

CULTURAL POLICY BAROMETER REPORT

PROFILES DRAWN FROM PERCEIVED HINDRANCES TO THE VITALITY OF CULTURE

What are the conditions for the vitality of cultural life in a country? What are the main characteristics of its environment? Which are the strengths and the weaknesses? (Yes, the opportunities and threats...) What kind of cultural policy model prevails?

The search for answers takes various forms. Comparing statistics is one way, probably the simplest. The Council of Europe – EricArts [Compendium](#) programme does so in an on-going manner. [Eurostat](#) publishes aggregations of national statistics every now and then. [Eurobarometer](#) has released its latest survey on cultural access and participation in 2013. The American [Arts Index](#) has inspired the quest for similar indicators in Europe.

The Executive Opinion Survey of the Global Competitiveness Index

The operations mentioned above are large projects, requiring considerable resources. The relatively simple instrument that the Budapest Observatory initiated in 2013 is modelled from a small component of the large Executive Opinion Survey, itself part of a sophisticated operation, the Global Competitiveness Index of the [World Economic Forum](#). Taking the latest edition of that survey lasted five months and involved 14,000 business leaders in 148 countries in 42 languages. Most of the 140 questions ask respondents to evaluate, on a scale of 1 to 7, one particular aspect of their operating environment. The format that served for the model of the BO barometer constitutes one question out of the 140. Respondents are asked to select the five most problematic factors for doing business from a list of 16 and rank them from 1 (most problematic) to 5. The list has not changed in the past few years. The lists of most problematic factors are established for over 140 economies every year. See for example the top of latest sets of complaints in two European countries:

Bulgaria	Sweden
Corruption	Tax rates
Inefficient government bureaucracy	Tax regulations
Access to financing	Restrictive labour regulations
Policy instability	Access to financing
Inadequately educated workforce	Inadequately educated workforce

The Cultural Policy Barometer of the Budapest Observatory

The BO barometer seeks answers to the question: “What are the most problematic factors for culture in your country?” Participants to the survey must select five from a list of 28 statements:

1. Absence of clear goals and transparent planning
2. Contemporary creation gets too little priority
3. Cultural policies lack relevance to fundamental issues of society
4. Declining private contributions (sponsorship, philanthropy)
5. Declining resources for local (municipal) culture
6. Education does not prepare for contemporary culture
7. Excessive political influence in cultural matters
8. Exodus of cultural talent from the country
9. Failures in engaging excluded social groups to culture
10. Favouritism and biases in the distribution of public grants
11. Financing mainstream institutions dominates government budgets
12. Government budget reflects low priority for culture
13. Hegemonic influence of commercialism

14. Indifference of the political and economic elite
15. Inefficient coordination with other sectors
16. Inefficient incentives for private contributions (sponsorship, philanthropy)
17. Lack of visionary leadership
18. Low professional level of cultural managers
19. Marginal place of the arts in school curricula
20. Outmoded structure of cultural institutions
21. Public's one sided preference for easy entertainment
22. Too little promotion of culture in the media
23. Too much emphasis on culture's impact on the economy
24. Unequal access to cultural infrastructure across the country
25. Unequal access to live culture across the country
26. Vanity projects absorbing too much money
27. Weak culture ministry
28. Weak financial situation of the public

The list has been distilled in two steps. A first variant of 25 items was tested in September 2013 among subscribers of the monthly newsletter of the Budapest Observatory. The selection rate of the respective items as well as comments received from the respondents led to the re-editing of the list. The new set was composed of 27 statements and was offered to the same subscribers' group in October 2014 who were asked to select five items in response to the question "What are the most problematic factors for culture in your country?" The higher response rate allowed for more nuanced analysis. Nevertheless, although the list grew, the distribution of the answers was slightly even more tilted than at the first run: 27% of all choices went to the top three items against 25% a year earlier. This, and the constructive comments sent by the correspondents prompted an instant revision of the list. Each answerer on any of the three most frequently chosen statements was consulted with sets of alternative wordings on the respective item. Finally, the top three factors were replaced by seven new statements. To keep the list short, in two cases two items were contracted into one and one factor was deleted. The revised list of 28 was sent out with the following month's newsletter in November 2014. The answers produced a healthier spread, producing less than 22% of hits for the top three choices which allows for a subtler analysis. (The [Annex](#) presents the evolution of the list.)

The function of the barometer

Both the original model and the BO barometer are based on opinions. Debate is going on about the reliability of opinion surveys in comparison to hard statistics. Nevertheless no major serious decision in the economy, politics or other field of society is made today without the use of opinion polls. Obviously, the more people's opinions are sought, the more convincing the surveys will be. Eurobarometer surveys contact large numbers of citizens and the value of the quests are increased by careful sampling of the respondents so that each important segment of society was included. Similar is the approach applied at the Executive Opinion Survey: there the large number is nevertheless taken from a well defined segment of business leaders in the 140 plus countries which makes it an "expert survey". By the use of subtle methodologies smaller scale surveys may also produce valuable results for analysts and decision makers.

The primary function of our barometer is diagnosing the actual state of the environment of culture in the given country, just as we could see in the economic competitiveness surveys. There the expert survey was one – albeit the most often cited – element of a huge examination consisting in majority of hard macrostatistics. The Cultural Policy Barometer, too, should be a complement to analysis of statistical data on various aspects of culture in the respective countries.

By its nature, however, the barometer can produce conclusions easier than what figures by themselves would imply. Expert views communicate signals about upcoming trends. Just like in weather forecast, barometers act as early warning systems.

There is a dilemma though. When “Marginal place of the arts in school curricula” is named by experts as the most problematic factor for culture in some countries (which indeed happened in our survey as you will see later), factual diagnosis is mixing with a value statement. Or when “Failures in engaging excluded social groups to culture” is deplored: to what extent does this reflect the affirmation of a priority rather than a verifiable truth?

Why is it that seeing the rank lists of the economic competitiveness survey this dilemma is less apparent? Why is it, that reading about “Inefficient government bureaucracy” in Bulgaria or “Restrictive labour regulations” in Sweden we sooner tend to take them as objective truth rather than (inverted) wishful thinking? “Inadequately educated workforce” appears to be equally sound in those very different countries, supposing proper (and very different) understanding by “adequate education” in the two places.

Disparity in evidence and discourse is the answer. Much less factual evidence supports assertions about culture than the economy. Also, public discourse dedicates much less space to the discussion of the state of affairs, strengths, weaknesses, opportunities and threats (to use swot terms) with regard to culture than to the economy. Businessmen facing the list of possible problematic factors have an easier task. They experience more hearing, talking and thinking about fundamental conditions defining their environment than is the case in the cultural sector. Participants of the economic competitiveness survey tend to have stable opinions. Most of the terms are familiar for the readers of the survey reports who find it easier to accommodate themselves to the findings.

This is where instruments like the Cultural Policy Barometer can play a role. Other than drawing genuine pictures about cultural life in a country, participating in, and musing about the findings of the surveys helps to identify and understand the factors that define the vitality of culture.

The 2014 autumn surveys

On both occasions the main aim of the Budapest Observatory was to introduce and test the new instrument. The proof of its merit was of course whether the barometer produces convincing portrayals about the conditions of culture in the various parts of Europe. This report hopes to give a positive account about the experiment.

As described before, the revised list of 27 statements was disclosed in October 2014 and generated 98 answers on 28 countries (including 3 from outside Europe). The instantly amended list of 28 was sent out in November on which 61 answers came.

Both sets of responses were processed and a choice had to be made. Whether to draw two sets of profiles and find a way of collating or interrelating the findings of the two rounds, or else to base the procedure on the longer set of 98 responses by somehow inserting the November answers, or again the other way round: to use the 61 answers given on the final list as a basis. Neither of the three are fully correct by recognised survey analysis standards.

As the main emphasis is on the instrument, the third version was followed. The profiles are based on the 28 final statements, combining the 61 responses arriving on them in November with the answers sent on the list of 27 in October. The 20 statements that were identical on both lists posed no problem. The remaining eight new items could all be related to items on the previous list in one way or another: the votes cast on those antecedent items during the October round were added to the new statements using simple arithmetic formulas regardless of statistical rigour.

In the 11 cases when the same person took part in both rounds the later responses were included in the analysis that follows on the next pages, based finally on 147 answers from 37 countries (including 4 from outside Europe).

The top seven factors

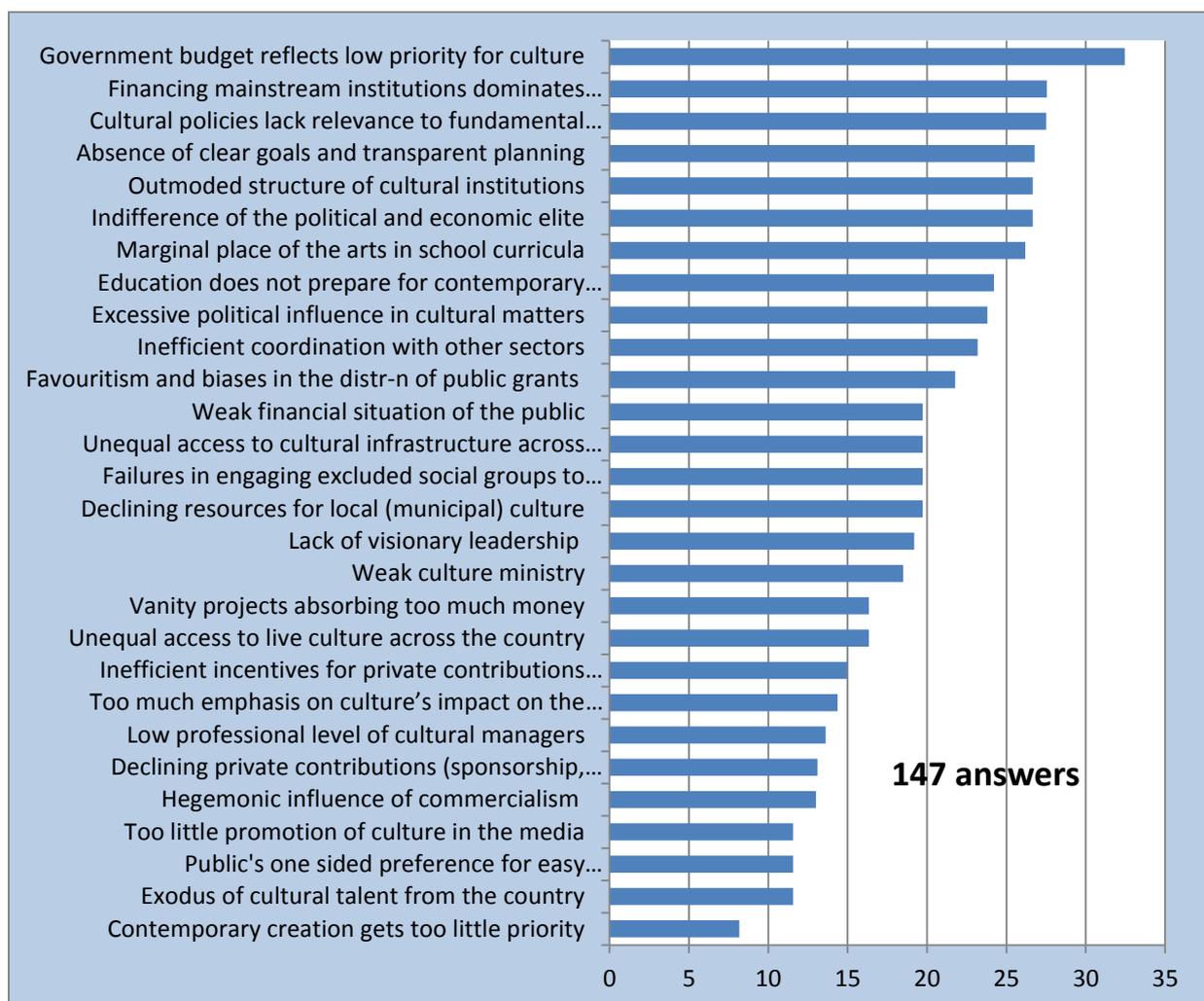
The total choices of the 147 respondents to the BO barometer are contained in [Diagram 1](#).

Together with “Government budget reflects low priority for culture” that was identified as the greatest plague of all, seven statements occupy top positions. These seven factors seem to currently embody the main difficulties for culture across Europe and beyond.

Interestingly, at the first survey a year ago the predecessor of the actual Nr.1 item occupied the tenth position only as “Insufficient subsidies from central (government) budgets”, and reached the 3rd place in October 2014 as “Declining subsidies from central (government) budgets”. The final wording of the statement may be the clue to the advance to the top: “low priority” suggests a greater trouble and threat than mere shortage of funds.

Positions 2-5 are occupied by statements that relate to strategic issues in the culture ministers' remit. “Financing mainstream institutions dominates government budgets” is apparently a claim opposed to financial regimes that favour projects, innovations, independent groups and individuals. This fairly straightforward assertion was followed by two more general basic requirements of culture policies: “relevance to fundamental issues of society” and “clear goals and transparent planning”, to return again to a more concrete complaint about the “Outmoded structure of cultural institutions”.

Diagram 1 Distribution of choices made by the 147 respondents



While culture ministers rarely have decisive influence on government budget which is the top complaint, the next four “problematic factors” in the rank list are worthy of their special attention. Not that reform minded ministers can overnight

- create a balance between financing established institutions and upcoming initiatives
- relate cultural policy priorities to burning social, political and economic needs
- announce priorities in clear and accountable terms
- and push through an overhaul of the structure of institutions

but they can (and should) act in a spirit that acknowledges the importance of these matters.

Two more items were selected in high numbers across all regions involved. Both grievances refer to the environment of cultural actions: “Indifference of the political and economic elite” and “Marginal place of the arts in school curricula”.

A brief reflection over the top of the list of problematic factors shaped by the 147 answers tempts one to take it as a general consensus about the state of culture across Europe and beyond. Nevertheless by breaking down the responses into East and West one arrives at two characteristically differing pictures as revealed in Diagram 2. On the following pages we shall examine the two sets separately to identify the systemic logic behind what appears like random disarray on this drawing.

Diagram 2 Diversity of priorities between choices made in the east and west of Europe

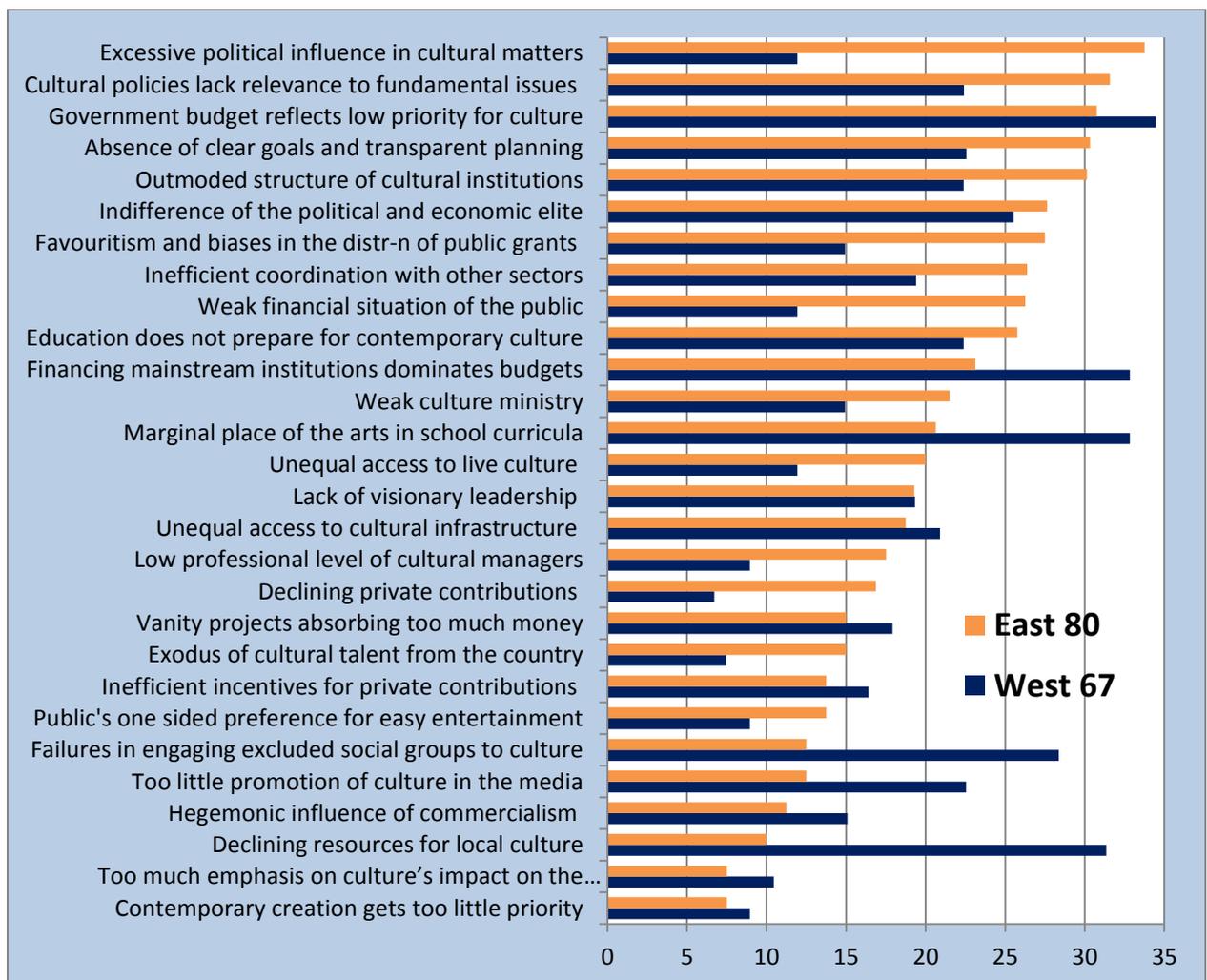


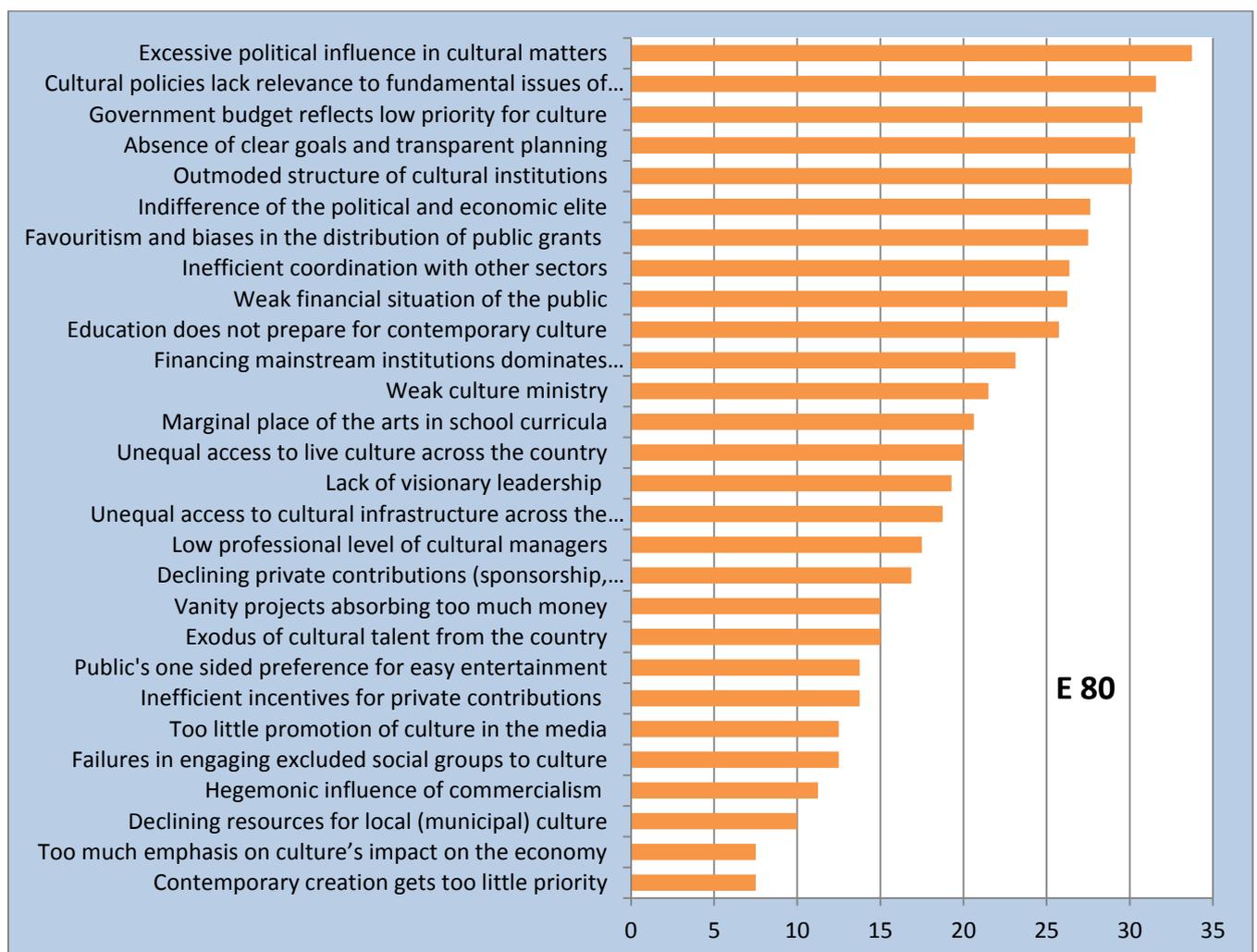
Diagram 3 is identical with Diagram 2 except that the “western” answers are removed. The remaining 80 responses came from former communist countries plus Turkey: besides geographical reasons this latter was added owing to similarities in content.

The barometer indicates that political interference into cultural matters is the greatest single problematic factor in this part of the continent. The other item that made its way into the top seven is the complaint about favouritism and biases in financial decisions, which is very closely connected to the excessive political influence. Cultural policy is of course “politics” by definition; but the majority of the eighty correspondents to the survey from the dozens of “eastern” countries deplore that direct or indirect power prevails over governance.

Besides these two politics-related statements “eastern” experts found two more items at least twice as problematic as their “western” colleagues did. That “Weak financial situation of the public” was rather high on the eastern rank list should hardly astonish anyone. It is a surprise, however, that in post-communist countries the decline in sponsorship and philanthropy is deplored much more than in part of the continent that is usually considered to be a model in this respect.

A glance at the bottom of the western list on Diagram 4 tells the real irony of the issue. The phenomenon of shrinking funds coming from private sources is widely discussed across Europe. Why it was found the as the least important of the 28 evils in the old democracies calls, however, for explanation.

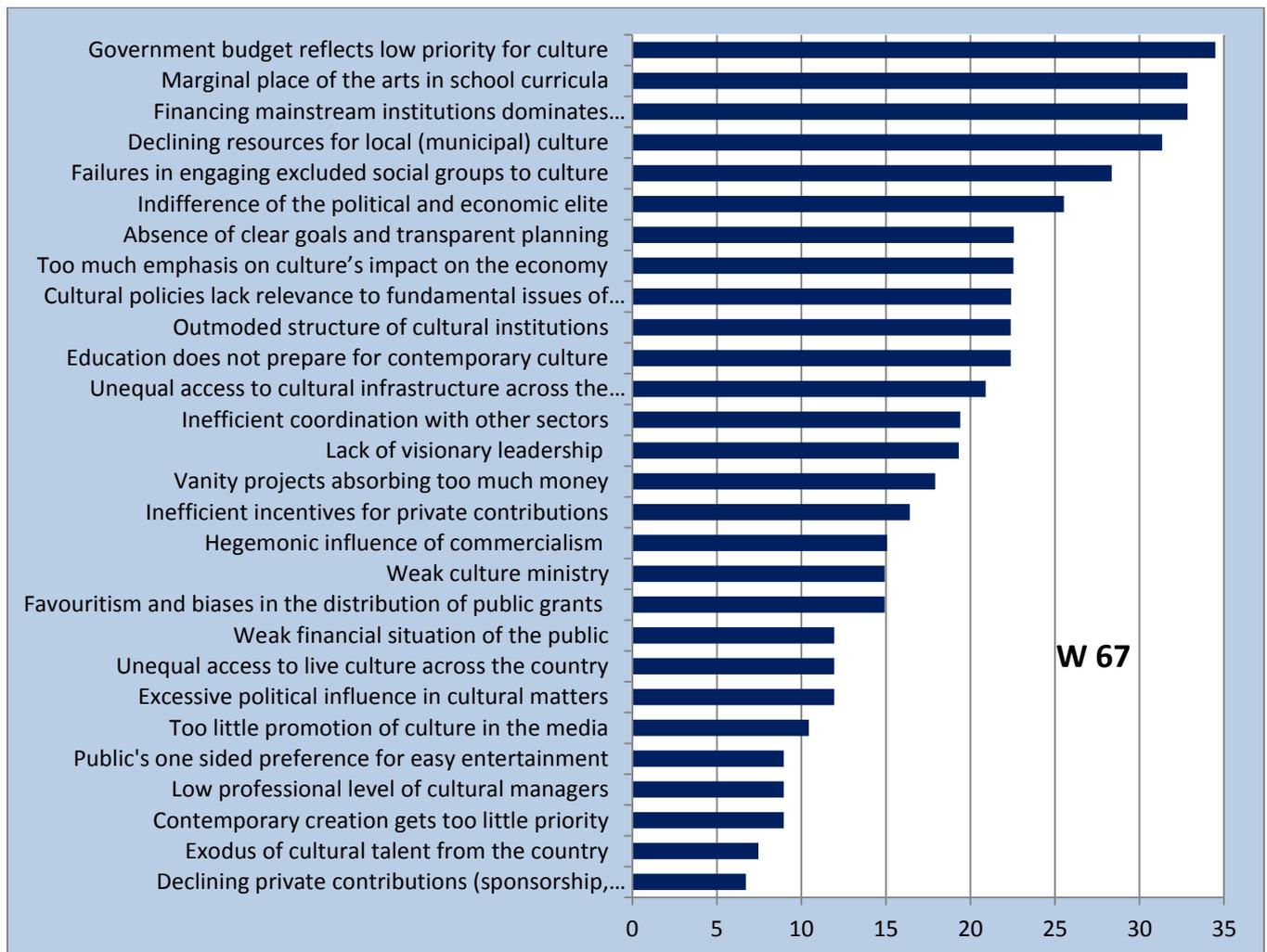
Diagram 3 Choices made in the new democracies of Europe



One more sharp divergence between the two halves of the continent raises eyebrows: why does the strong emphasis on culture’s impact on the economy bother western experts much more than their colleagues in the east?

Two other issues were identified much more problematic for culture in the west than in the east: “Declining resources for local culture” and “Failures in engaging excluded social groups to culture”. Especially the size of the east-west gap is a surprise, yet the explanation comes easier. Both statements express the social responsibility of culture. An ideological engagement that is probably less felt in the east where entire societies feel deprived (also culturally) and thus less attention is left for those below and outside.

Diagram 4 Choices of the old democracies



Centre 43

The analysis continues along the smaller units consisting of groups of countries.

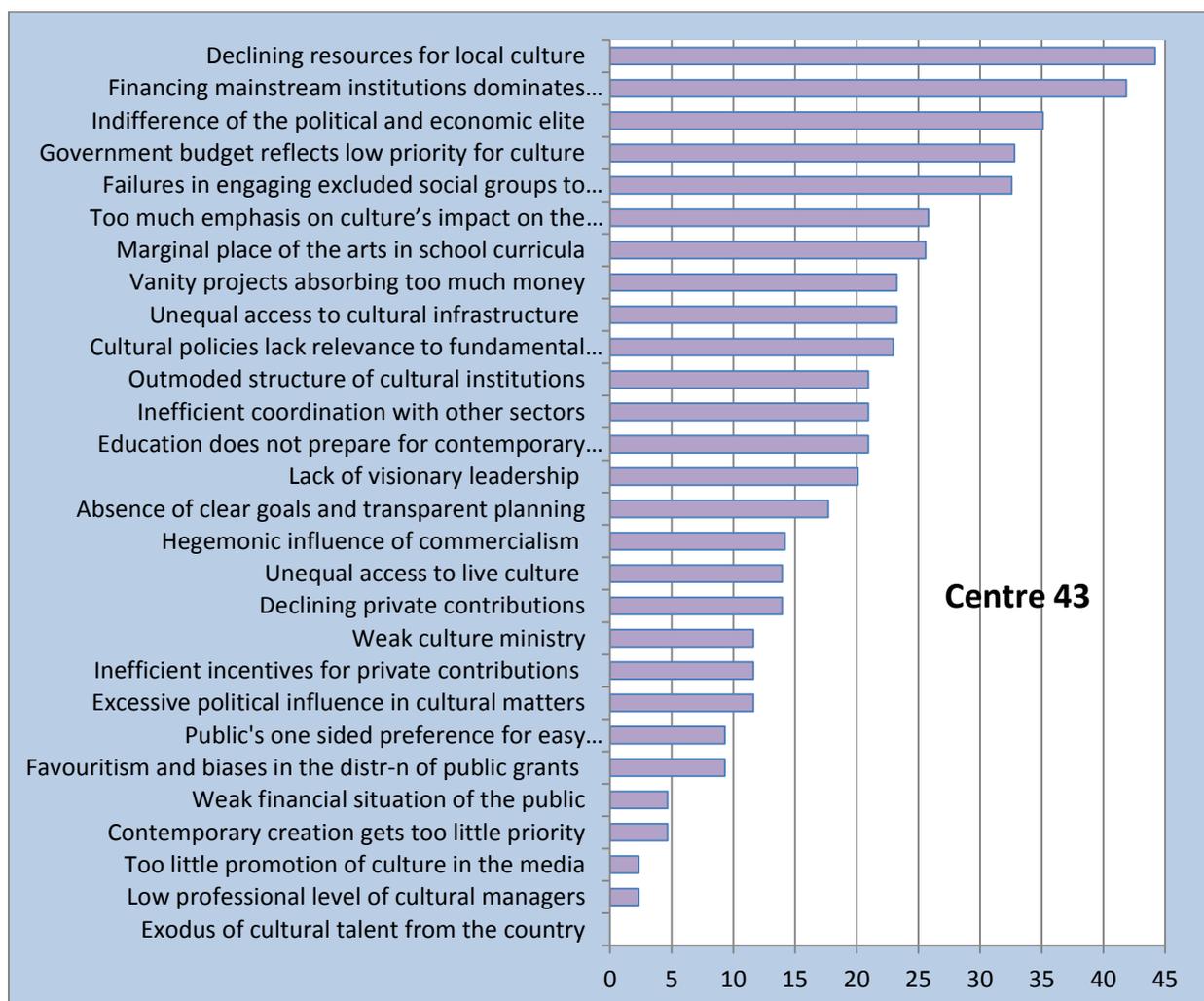
The largest relatively homogeneous region was formed from the north-western and central countries in Europe. Since these 43 expert views represented two thirds in the “western” culture policy profile based on 67 contributions and presented above, the similarity between Diagrams 4 and 5 are obvious. Nevertheless specificities are also meaningful.

Concern for local culture dominates the thinking of the 43 respondents in this region, over three times more than anywhere else. No other problematic factor is chosen by any one region detached this far from the rest as this one!

There are a number of issues in which regard this central group of countries is isolated from the other regions, nevertheless to a lesser degree than about local financing and in the opposite sense. Namely the following were chosen much less than elsewhere: the professional level of cultural managers, the financial situation of the public, promotion of culture in the media as well as biases in cultural funding. The issue of the exodus of talent was not taken up by anyone in this group, no wonder.

From those items that experts from advanced central countries mentioned as problematic factors in greater number than the other regions for some the explanations does not come easy. Why are vanity projects a greater issue here than anywhere else? Also the emphasis on the economic impact of culture? Are culture ministries indeed the weakest in this group of countries?

Diagram 5 Centre 43



Southeast 35

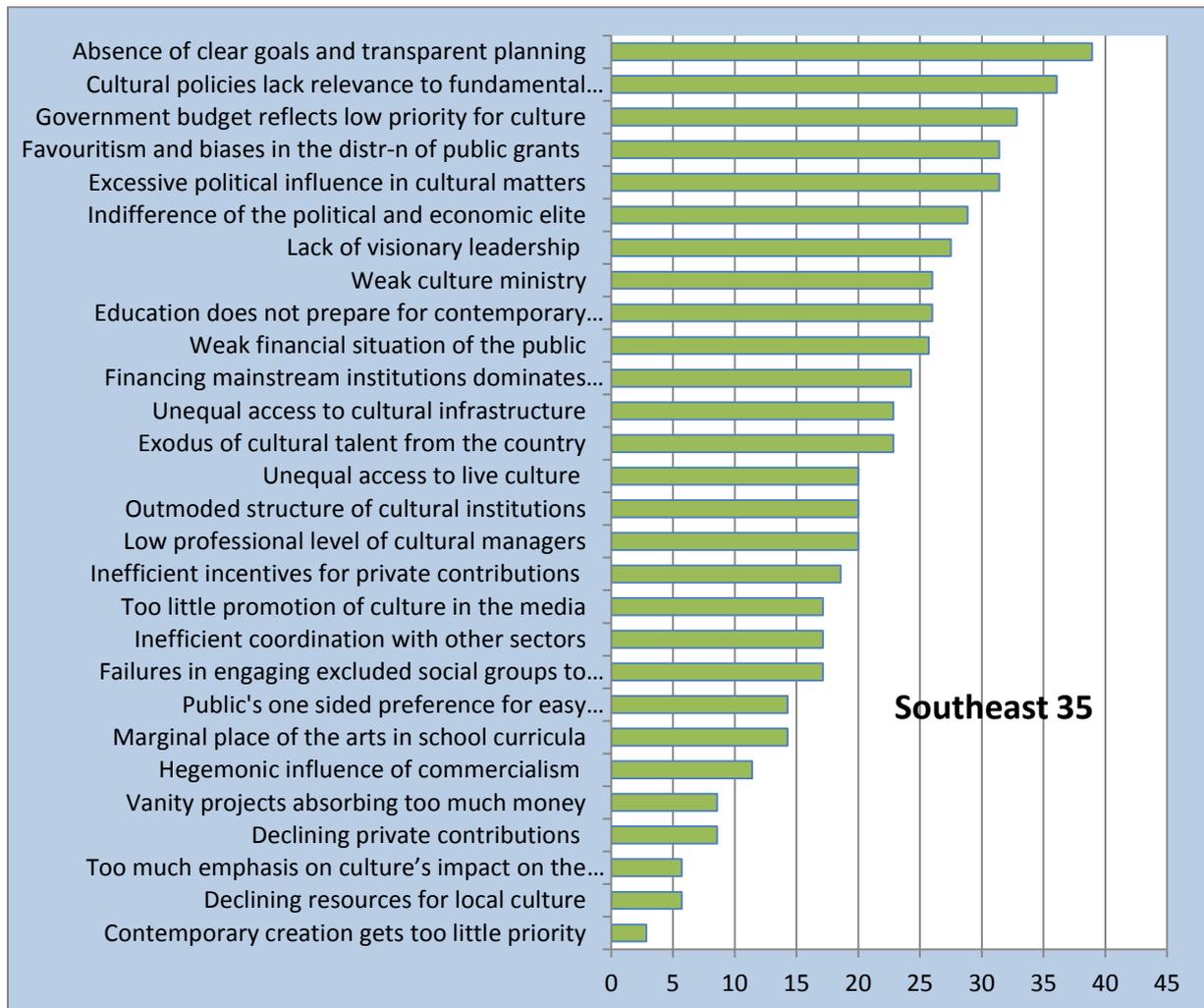
The second largest bunch of answers came from the southeast, where eight Bulgarian and seven Turkish responses constituted the biggest contingents.

In contrast to the more concrete and practical items that were on top of the north-western rank list, the main concern here is about general features of cultural policies: clarity of goals, transparency in planning and relevance to fundamental issues in society. The frequency with which these two items were selected stands apart from all other regions. Apparently, in this part of the world there is a deep deficit in these properties at the expense of improvised decisions. At the same time, in the absence of articulated culture policy measures to dispute, culture fans’ wishes tend to remain in the abstract realm. This is corroborated by the wish for visionary leadership which was marked in this group significantly more often than in the other regions.

At the lower end of the list, experts from the southeast named the declining resources for local culture less often than in the other regions, and particularly sharp is the contrast to the central (and north-western) countries.

The weak position of the arts in the school curricula was also chosen fewer than anywhere else, the greatest distance was from the Mediterranean group where this is the top grievance.

Diagram 6 Southeast 35



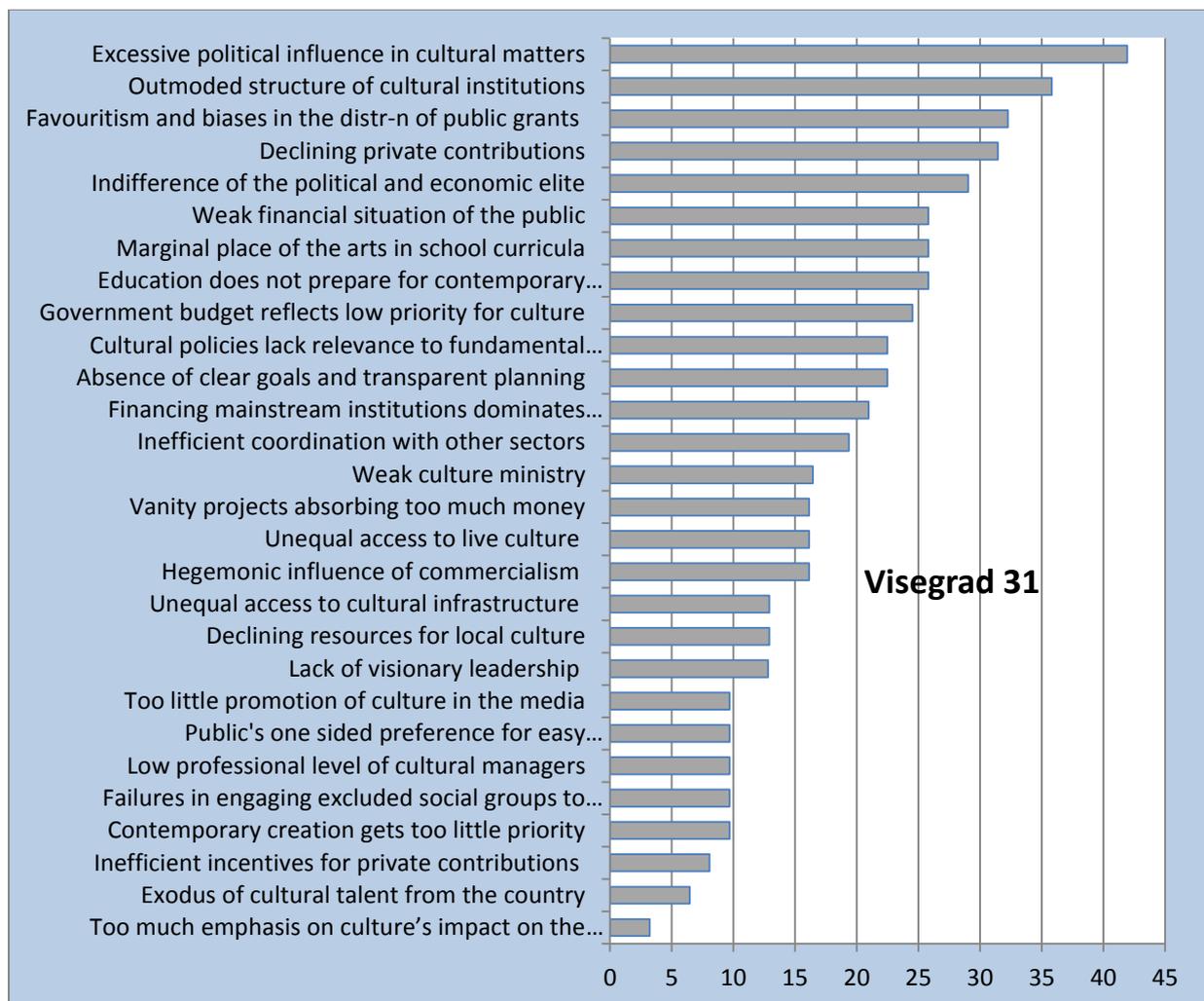
Visegrad 31

From the Czech Republic, Hungary, Poland and Slovakia – the four Visegrad countries – 31 answers came, featuring strong aversion about political interference into cultural matters. This seems to be in slight discord with the relatively high position of “Indifference of the political (and economic) elite”, yet is corroborated by frequent complaint about favouritism and biases in funding.

At the other end, the economic function of culture does not appear to be overemphasised in the V4 region.

Correspondents from this east-central European area are tired about the outmoded structure of their cultural institutions and they probably long for reforms significantly more than in all other regions.

Diagram 7 Visegrad 31



Mediterranean 20

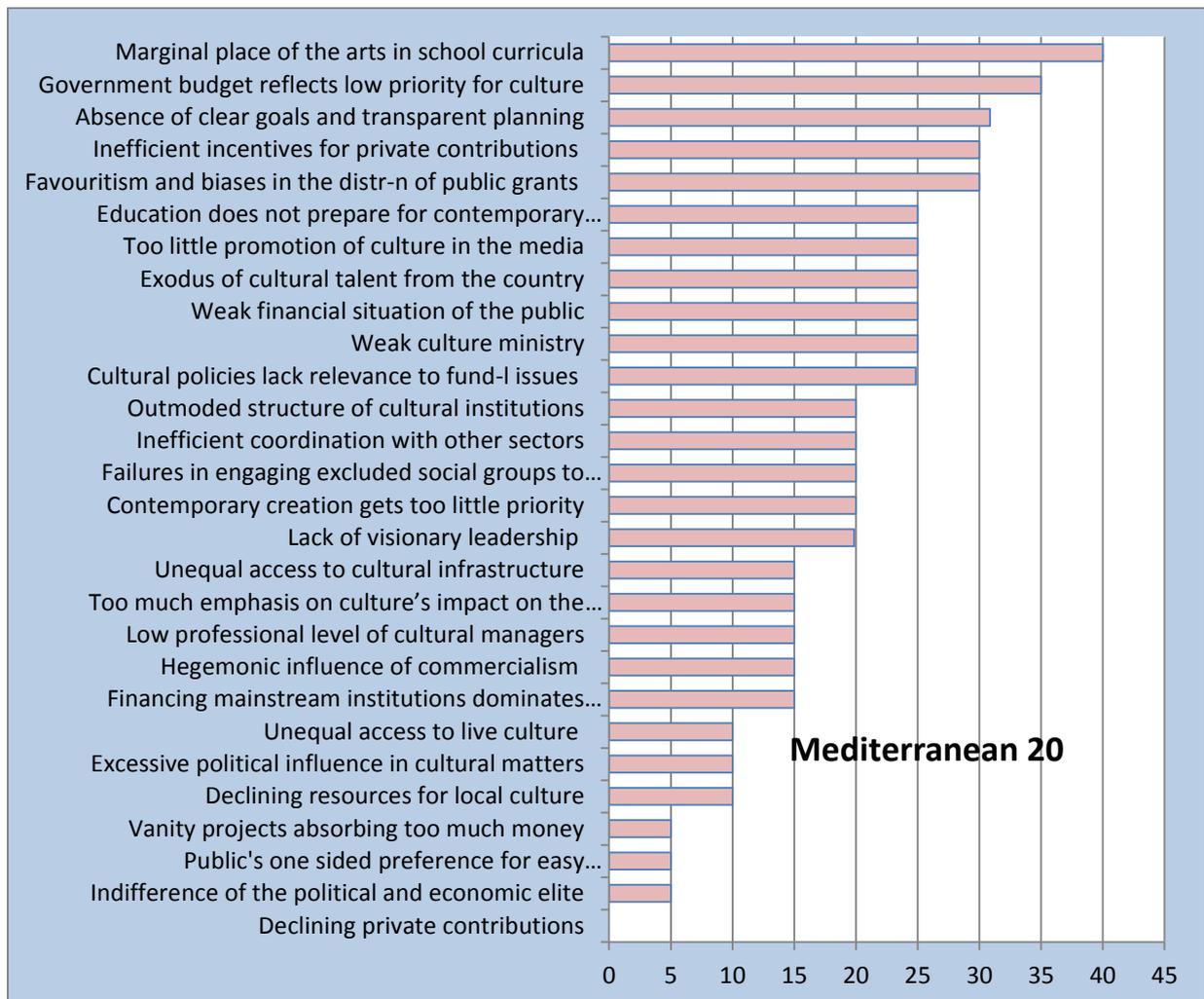
The twenty responses arriving from five Mediterranean countries are displayed in Diagram 8. They are more determined than in any other region about calling for a larger place for the arts in the schools. This is coupled by a stronger than average reproach about the conservative character of cultural education.

The Mediterranean list of problematic factors contains a contradiction that a much larger number of responses could probably solve or nuance. No-one pointed at the decline of sponsorship and donations but the large number of complaints about the related incentives indicates that the issue is high on the agenda.

There is however logic in the correlation between the low – lowest between regions – reference to political interference, vanity projects and the indifference of the elite.

Although lamenting about the limited attention that contemporary creation receives and about the too little role of culture in the media are both in the middle section of the rank list, they are underlined by Mediterranean experts stronger than in all other regions.

Diagram 8 Mediterranean 20



Smaller sets

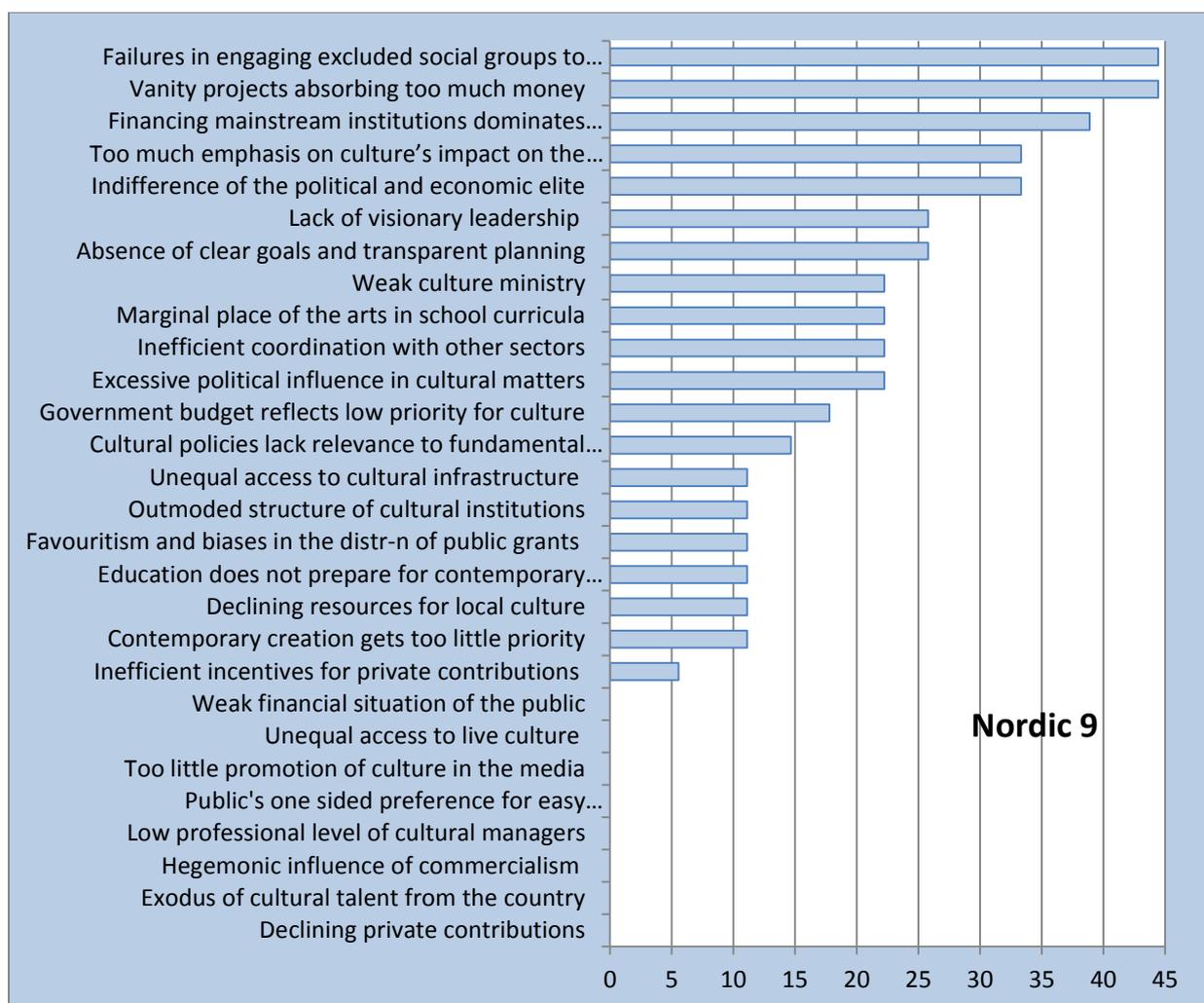
It is tempting to draw country level profiles, nevertheless the 147 responses do not allow for breaking down further. Only a couple of countries are represented with more than ten persons which is too little a number for robust results. A greater number implies a more even distribution by field (heritage, performing or visual art, audiovisuals...), background (cultural organisation, independent artist, administration, research...) etc.

To illustrate how a rank list with few responses looks like Diagram 9 shows the distribution of choices made by the nine answers sent from the north of Europe.

The eminent concern about the excluded meets our perception about Nordic cultural policies. This, however, cannot be said of the top complaint about vanity culture projects.

Also, the limited attention that sponsorship receives meets one's expectation. On the other hand, strong resistance to emphasising culture's impact on the economy may contradict the advances of the concept of creative industries in the Nordic countries.

Diagram 9 Nordic 9



Thematic clusters

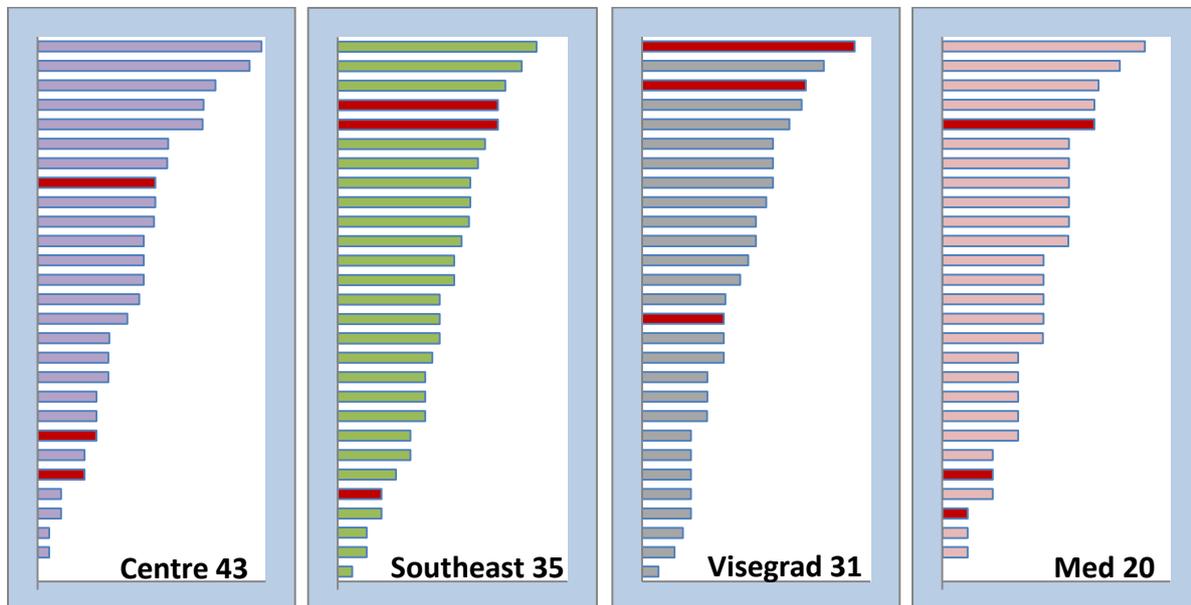
Besides watching divergences on the level of individual items, problematic factors can be grouped into thematic clusters like the following:

“Political interference”: Excessive political influence in cultural matters + Favouritism and biases in the distribution of public grants + Vanity projects absorbing too much money

This cluster is mentioned first because it showed the greatest distance between the two basic groups of countries, much to the advantage of the east (i.e. these statements were chosen much more often in the east). It goes without saying that these differences appear on the level of the four regions as well, as visualised in the following graphs.

On Diagram 10 the red lines stand for the three statements relating to “political interference”. These three problematic factors were positioned the highest in the four Visegrad countries while the centre, and almost to the same degree the Mediterranean countries appear to be fairly immune to these manifestations of political power.

Diagram 10 Position of politics related statements



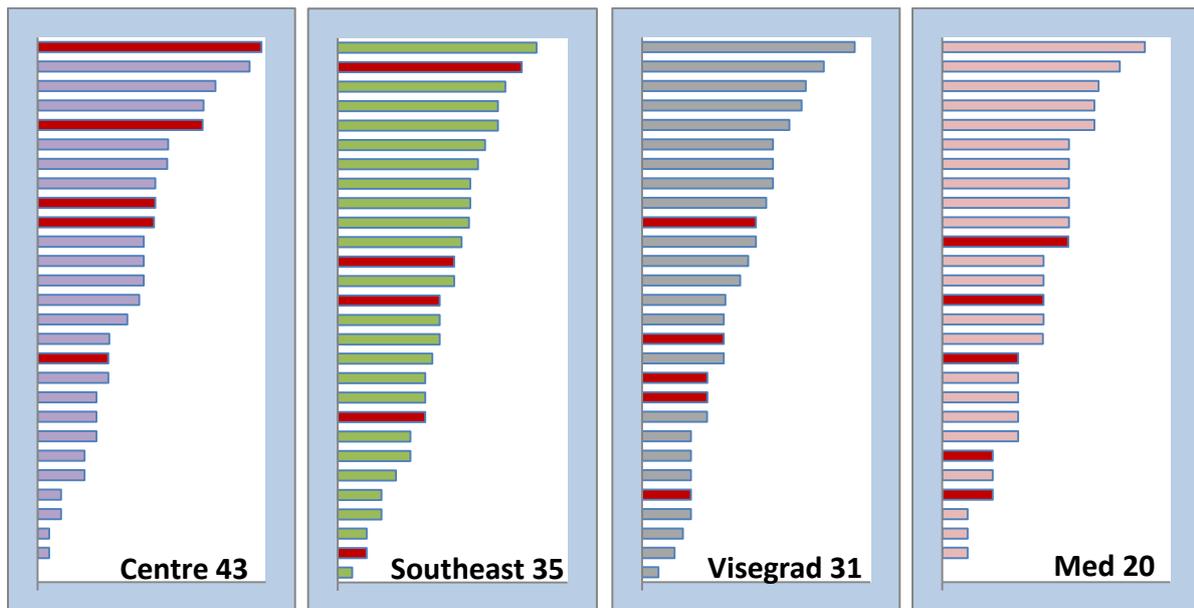
The next group of statements is about “Democracy”, although it may as well be labelled “Good governance” and “Equality”.

“Democracy”: Cultural policies lack relevance to fundamental issues of society + Declining resources for local culture + Failures in engaging excluded social groups to culture + Unequal access to cultural infrastructure + Unequal access to live culture across the country

Diagram 11 best illustrates the dilemma whether the positions express value statements or facts. It is improbable that democratisation of culture or cultural democracy is the most problematic in the north-west and centre of Europe, much more than in the Visegrad four. In this case the barometer signals priorities in expectations rather.

In general the south-eastern countries (ex-Yugoslav countries, Bulgaria, Romania and Turkey) show similarities to their Visegrad and Mediterranean neighbours but not in case of features of democracy where the opinions were closer to those of the advanced centre. Except for the issue of funds for local, municipal culture which is valued here less than anywhere else. This may imply sensitivity for the social functions of culture but less keenness on decentralisation.

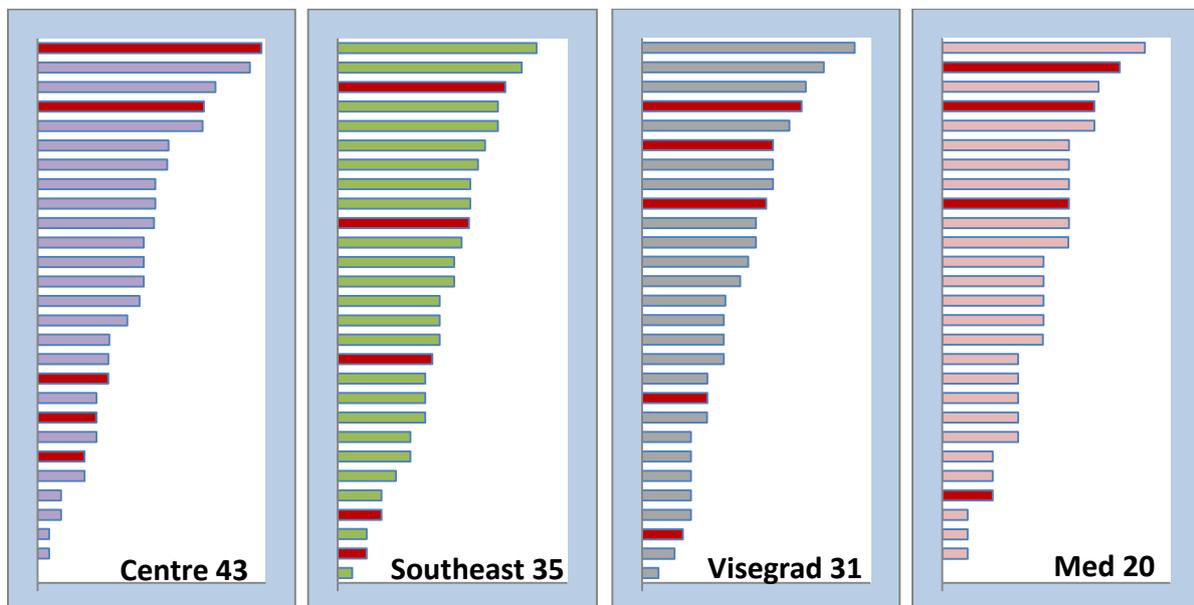
Diagram 11 Position of statements about democracy (inclusion, equality, local culture)



Differently from the previous two cases, the distribution of statements relating to financing culture in the four regions on **Diagram 12** does not show sharp differences. Divergence exists on the level of the individual items but not on the level of the cluster. (The item on local financing is included in both this and the preceding cluster.)

“Financing”: Declining private contributions + Declining resources for local culture + Government budget reflects low priority for culture + Inefficient incentives for private contributions + Weak financial situation of the public

Diagram 12 Position of statements connected to financing



The three clusters above have been composed hand-picked. The usual processes of mathematical statistics require larger samples of respondents. Nevertheless our survey also produced several couples of items whose choices showed certain correlation although the thematic relationship is not obvious at first glance. The last two graphs show two such coincidental couples, leaving the interpretation to the reader.

Diagram 13 Failures in engaging excluded social groups to culture + Too much emphasis on culture's impact on the economy

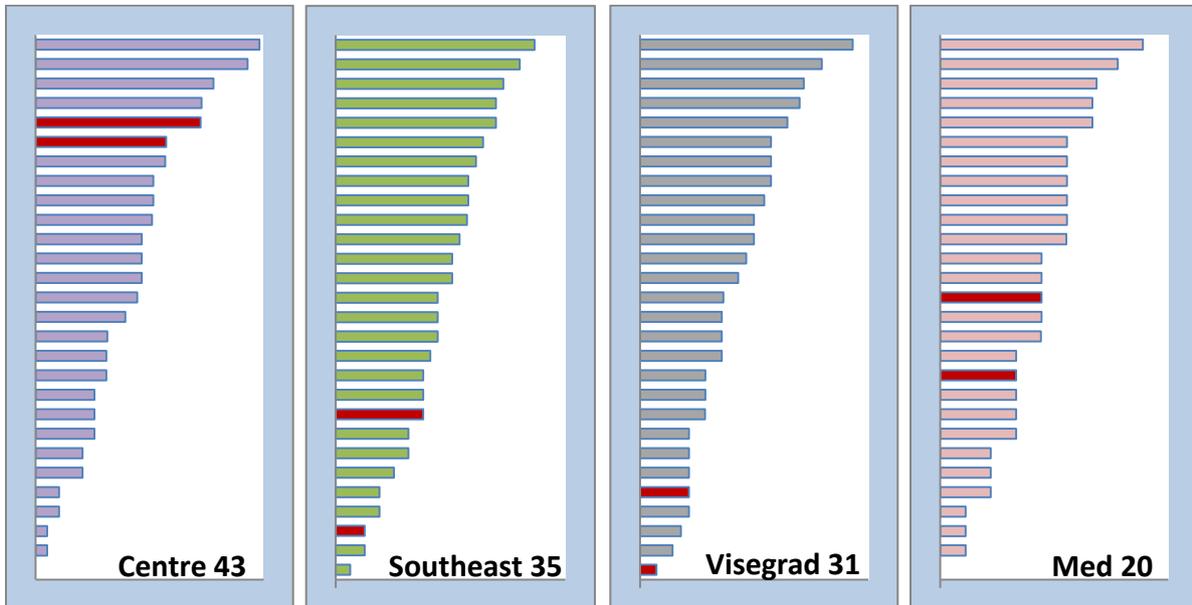
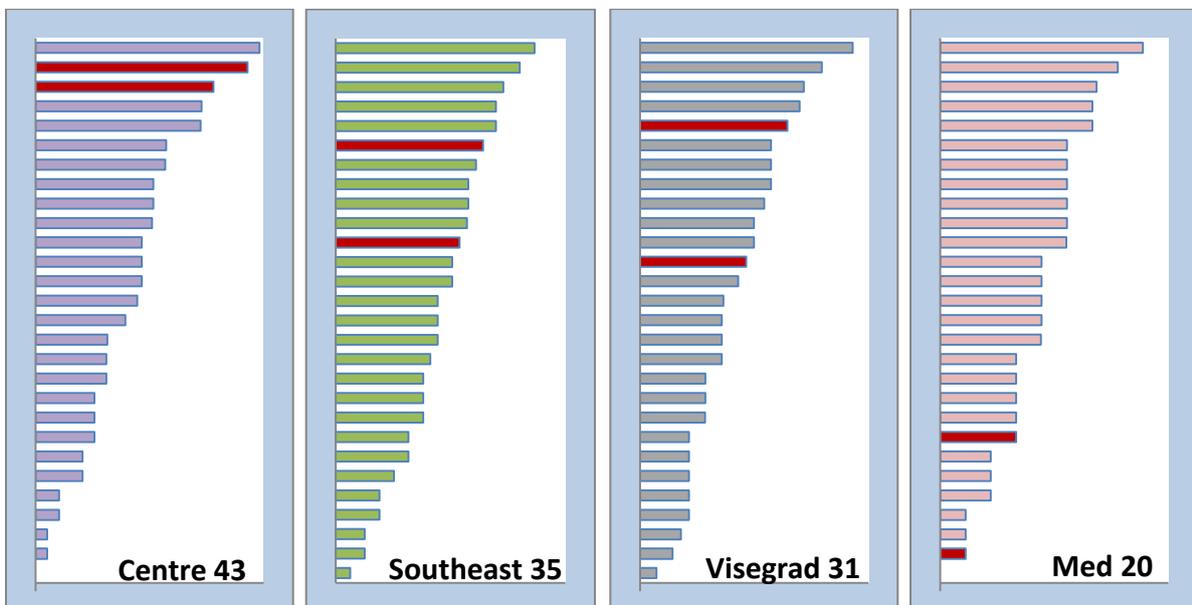


Diagram 14 Financing mainstream institutions dominates government budgets + Indifference of the political and economic elite



Conclusion

In spite of the efforts spent on the analysis of cultural policies over the past decades, including their main types and models, considerable conceptual uncertainties prevail. The delineation and assessment of “culture” (cultural life, the state and vitality of culture etc.) in a given society lacks the clarity with which most other societal areas are described. True, the lack of descriptive concepts is connected to the dearth of factual indicators, namely consolidated and harmonised reliable statistical data.

This state of affairs lends special significance to heuristic approaches like opinion surveys, especially if these rely on competent stakeholders. The Cultural Policy Barometer has been conceived with such intentions.

The patterns and profiles that the barometer has drawn highlight features of the conditions for cultural life in respective geographical areas in 2014. The majority of findings indeed confirm guesses shaped by prior knowledge, offering nevertheless further insight into the relative hierarchy of perceived hindrances to the vitality of culture, with special regard to the differences between groups and types of countries. On the other hand, unexpected responses were also produced in considerable numbers. In a way, they are the real asset of pursuits like this: issues that require further thinking and inquisition. Some of the unanticipated findings may bring latent weaknesses to the foreground. Others point at dissonance between cultural policies and developments in real life. In some cases they qualify for “weak signals” of future phenomena.

Unforeseen responses have of course a self-referential side as well. The evolution of the list of statements of the barometer was partly steered by learning from unanticipated response rates. Correcting the items of the list is nevertheless more than an issue of survey methodology. It is part of the monitoring of the progress of language about culture and cultural policies, which mirrors the evolution of concepts and priorities.

Beyond the snapshots taken about the constellation in which culture lives in the various part of Europe (and beyond), the precious contribution of some two hundred correspondents along the three pilot rounds enabled the BO barometer to demonstrate its potential as an instrument. Besides serving as a tool to detect, describe and assess conditions and trends of culture and cultural policies, it may contribute to the consolidation of the usage of relevant concepts and terms.

5 January 2015

Annex. Evolution of the list of statements

25 items, September 2013	27 items, October 2014	28 items, November 2014
Lack of cultural policy vision	Lack of robust cultural policy vision	Absence of clear goals and transparent planning
Lack of transparency in decision making		Cultural policies lack relevance to fundamental issues of society
Low level of innovativeness and creativity	Contemporary art gets too little priority	Contemporary creation gets too little priority
Not enough funds from business sponsorship	Declining funds from business sponsorship	Declining private contributions (sponsorship, philanthropy)
Not enough funds from philanthropic donation	Declining funds from philanthropic donation	
Insufficient subsidies from local (municipal) budgets	Declining subsidies from local (municipal) budgets	Declining resources for local (municipal) culture
Inefficient cultural education	Marginal place of culture in education	Education does not prepare for contemporary culture
		Marginal place of the arts in school curricula
<i>Excessive political influence in cultural matters</i>	<i>Excessive political influence in cultural matters</i>	<i>Excessive political influence in cultural matters</i>
<i>Exodus of cultural talent from the country</i>	<i>Exodus of cultural talent from the country</i>	<i>Exodus of cultural talent from the country</i>
	Failures in engaging excluded social groups to culture	Failures in engaging excluded social groups to culture
Favouritism and biases in the distribution of public grants	Favouritism and biases in the distribution of public grants	Favouritism and biases in the distribution of public grants
Insufficient subsidies from central (government) budgets	Declining subsidies from central (government) budgets	Financing mainstream institutions dominates government budgets
		Government budget reflects low priority for culture
Hegemonic influence of commercial media and events	Hegemonic influence of commercialism	Hegemonic influence of commercialism

25 items, September 2013	27 items, October 2014	28 items, November 2014
Political and economic elite offers no model to follow	Indifference of the political and economic elite	Indifference of the political and economic elite
	Inefficient coordination with other sectors	Inefficient coordination with other sectors
Inefficient incentives for business sponsors	Inefficient legal incentives for business sponsors	Inefficient incentives for private contributions
Inefficient incentives for philanthropic donors	Inefficient legal incentives for philanthropic donors	
<i>Low professional level of cultural managers</i>	<i>Low professional level of cultural managers</i>	<i>Low professional level of cultural managers</i>
<i>Outmoded structure of cultural institutions</i>	<i>Outmoded structure of cultural institutions</i>	<i>Outmoded structure of cultural institutions</i>
Public's preference for easy entertainment	Public's one sided preference for easy entertainment	Public's one sided preference for easy entertainment
Indifference of the public		
Too conservative taste of the public		
	Too little promotion of culture in the media	Too little promotion of culture in the media
	Too much emphasis on culture's impact on the economy	Too much emphasis on culture's impact on the economy
<i>Unequal access to cultural infrastructure across the country</i>	<i>Unequal access to cultural infrastructure across the country</i>	<i>Unequal access to cultural infrastructure across the country</i>
<i>Unequal access to live culture across the country</i>	<i>Unequal access to live culture across the country</i>	<i>Unequal access to live culture across the country</i>
	Vanity projects absorbing too much money	Vanity projects absorbing too much money
Inefficient culture ministry	Weak culture ministry	Weak culture ministry
Precarious financial situation of the public	Weak financial situation of the public	Weak financial situation of the public
Dominant positions of foreign culture		
	General complacency instead of exigency for quality	