TOWARDS BROADER CULTURAL INDICATORS? PERFORMANCE INDICATORS AND JUSTIFICATION OF CULTURAL POLICIES IN QUEBEC AND EUROPE

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Summary

This study examines the relationship between the justification of cultural policies and performance indicators in Quebec, the European Union and the United Kingdom. While these three geographic zones continue to widen their definition of cultural participation and emphasize partnerships with cities, the private sector and civil society, considerable differences exist between Quebec and Europe. In an attempt to measure the social impact of the arts on individuals and communities, the European Union and the United Kingdom apply an increasingly broader definition of cultural indicators. This conforms to their latest cultural policy objectives that target economic development and the development of individuals and communities. By contrast, Quebec mostly defines cultural indicators according to economic and traditional themes (production, consumption, audiences, etc.). As a result, there is a discrepancy between the policy objectives – based on personal and economic development as well as collective identity affirmation – and the main indicators. The study reflects on the range and limitations of broader cultural indicators, particularly in relation to urban governance and the development of cultural citizenship.

Introduction

The main objective of this document is to report on a preliminary study, carried out at the request of Canadian Heritage, on the development of performance indicators in Quebec, Europe, and (in particular) the United Kingdom. The study's goal is to review and analyze the main indicators developed by the governments of these jurisdictions. Indicators are recurrent and updated measures that allow individuals or organizations to describe conditions, record trends and identify results. They exist within a framework of evaluation procedures that examines whether or not set objectives are achieved. As such, developing performance indicators is a crucial step in the evaluation process, something the increasing number of conferences and documents on the subject indicates (see bibliography).

This document is not the proper forum for a detailed analysis of how and why the evaluation policies sector has evolved. Instead, in the context of difficult choices concerning public investment priorities and the need for governments and organizations to be efficient and accountable, we emphasize the need, as expressed by artists, cultural organizers and government officials, for practical tools to evaluate, measure and justify the impact of their practices and policies.

In order to bring our research to a successful conclusion, we hypothesize that a close link exists between the development of indicators and the principal justifications for cultural policies. Policy evaluation principles and government-developed indicators are linked to their main parameters – parameters that serve to justify cultural policy and the various programs stemming from cultural policy. This type of linkage is not new. Luis Bonet and Emmanuel Négrier demonstrated a global evolution connecting rationales, purpose, intervention sectors and indicators in the Western world (Bonet and Négrier, 2002). Indeed, from the 1800s to 1945, we witnessed the influence of cultural heritage, elitism and nationalism, the purposes of which were conservation, national identity building, public education, training of an artistic elite, national heritage intervention sectors, libraries, fine arts, monuments, school books, art schools, etc. The years 1945 to 1960 represented an artistic phase based on the distribution of high culture and creativity. In this context, the intervention sectors were the fine arts and the contemporary arts, and the indicators were quality institutions and festivals.

From 1960 to 1980, a socio-cultural approach prevailed, its purpose directed towards cultural democratization and participation. Intervention sectors favoured multifunctional facilities, popular culture, communication tools and indicators measuring the participation of

different social classes and non-professional practices along with the decentralization of the cultural supply side, etc. Economic and cultural development dominated between 1980 and 2000. The goals were production and distribution, economic development, competitiveness and growth, cultural diversity, intervention areas linked to television, radio, NTIC and multimedia. The period also showed indicators focused on the production, consumption and export of cultural products.

We propose, however, to make this outline more complex and to examine the relationship between justifications and indicators. The relationship exists in two parts: harmonious (where the policy foundations and the indicators are linked) and conflicting (where there is a lack of coherence between justifications and indicators). This outline will allow us to closely examine historic and contemporary interaction between development and the evaluation of cultural policy.

We will focus on three jurisdictions: Quebec, the European Union and the United Kingdom. Throughout the years, the institutions and governments of these areas have developed ambitious cultural policies and expressed the need to create impact-measuring indicators. Our analysis will demonstrate two main elements: First, the trend towards developing basic statistical indicators; and second, the trend towards a strictly economic definition of performance (identifiable within the three jurisdictions). It should be noted, however, that statistical indicators increasingly involve an all-encompassing definition of cultural participation, including amateur practices, new media, audio-visual links, popular culture and cross-media cultural participation (e.g., to admire a painting on the Internet). Increasingly, targeted surveys of selected audiences are also undertaken.

Also, significant differences exist between the three zones. In an attempt to measure the social impacts of the arts on individuals and communities, the European Union and the United Kingdom are adopting an increasingly broad definition of cultural indicators. This is in accordance with the recent planned outcomes of their cultural policies. Their aim is economic development as well as the development of individuals and communities. For its part, Quebec is adopting a mainly economic and traditional definition of indicators (production, consumption, attendance at cultural events, etc.). Therefore, there is no conformity between the main indicators that have been developed and policy objectives combining essential elements of economic development, affirmation of collective identity and personal development.

The analysis will be presented in four sections. The first three will examine the situation in Quebec, the European Union and the United Kingdom. Each of these three sections will be divided into two parts consisting of an historical context (and recent policy objectives), followed by a description and analysis of the developed indicators. The final section offers a few thoughts about the breadth (and limits) of using broader cultural indicators. The links between these types of indicators and urban governance will be addressed, while some of the practical challenges of developing indicators will be highlighted.

1.   Quebec

1.1. Context and justifications for cultural policy

Despite the many institutions and organizations established by the Quebec Government – often in partnership with the Catholic Church – at the end of the 19th and beginning of the 20th century (who have, incidentally, played a major role in the protection and cultural development of French Canadians), the Quebec Government became principally involved in the early 1960s (Poirier, 2004). The first priority of this government was to set up a ministry of cultural affairs (April 1, 1961), the first political platform initiative of Premier Jean Lesage's

Liberal Party which rose to power in June 1960. The mandate of the ministère des Affaires culturelles (MAC) was to encourage the growth and development of the arts and literature in Quebec as well as their influence and prestige outside the province. Despite the ambitions of Minister Georges-Émile Lapalme (who wanted to adopt a broad definition of culture), the definition finally adopted by the government was a traditional, elitist conception of culture based on funding artists and creators.

Under Pierre Laporte, the ministry wrote a Livre blanc (white paper) that was never registered in the National Assembly, (nor published), because the cabinet judged it too "nationalist," and because, incidentally, the provincial Liberals were defeated in June 1966 (the next minister responsible for cultural affairs did not follow up in any way). The white paper, however, provided a glimpse into the 1970s by linking culture, national identity and state intervention. As a sign of the openness of the emerging Quebec identity towards plurality, Minister Laporte gave special and sustained attention to immigration issues by integrating them into the ministry's responsibilities. Very quickly, a more anthropological and all-encompassing definition of culture emerged (see the recommendations of the commission of inquiry into arts education – the Commission d'enquête sur l'enseignement des arts au Québec – under the direction of Marcel Rioux, in 1968).

In the early 1970s, the ministry's approach was based on the distribution and accessibility of works. Later, culture went progressively beyond the realm of the individual and caught up to the concept proposed by Pierre Laporte in 1965: a cultural policy must be a policy of the person and of the community; it must aim to define identity, and the state must support the community. Premier Robert Bourassa, who expressed his desire to emphasize Quebec's cultural sovereignty within the Canadian context, also supported this new direction. In 1975, Cultural Affairs Minister Denis Hardy implemented the joining of distribution, democratization of culture, and development of the spécificité québécoise through control of the means of production and the commercialization of cultural goods and services.

Jean-Paul L'Allier proposed a Livre vert (green paper) in 1976. It suggested intensifying the ministry's move towards administrative de-concentration and general decentralization through increased collaboration with cultural outreach organizations, municipalities and regions. The green paper also suggested transferring responsibilities to arm's length organizations such as Quebec's arts council, heritage public trusts, regional commissions, the museums commission, etc. (Conseil de la culture; Régie du patrimoine; Commissions régionales; Commission des musées; etc.), and it suggested an increased role for arts organizations. These directions heralded the arrival of the organizer/coordinator roles – soon to become trademarks of the MAC – rather than the traditional manager/planner roles (interventionism).

The René Lévesque Government took power in 1976, putting culture at the centre of its collective plan, both in terms of public actions and political deeds. One of the government's first initiatives was to create four permanent ministerial committees linked to the Conseil exécutif. The objective was to increase inter-ministerial cohesiveness by grouping several ministries around a large common theme. The targeted areas were land management, economic development, social development and cultural development. A cultural development cabinet minister was appointed (Camille Laurin) to work with the ministère des Affaires culturelles and the ministère des Communications and gave culture a new social and political reach.

Two years later, the government's cultural policy was presented in a white paper (Ministre d'État au Développement culturel, 1978a, 1978b). Rather than being reduced to individual works or museum pieces, culture was imagined as a place for living (milieu de vie). As it came within the scope of every sector - language, education, work, economy, housing,

environment, leisure, tourism, communications - culture became linked to the community's collective identity. According to Camille Laurin, cultural identity gave a cohesiveness to the collective project of reclaiming Quebec's destiny. The key lever of this policy was an important semantic shift from culture to cultural industries. The cultural industries were characterized by a symbiosis (and the balance to achieve) between industrial re-productibility (large scale production to minimize costs and maximize profits, and a limitless extension on the number of times a service may be used) and the content corresponding to a mode of personal or collective expression (identity). Policy, economy and culture now formed a single reality in government discourse. A conference on cultural industries, held December 3-5, 1978, confirmed this direction (Secrétariat permanent des conférences socio-économiques, 1979). French researcher François Rouet maintains that Québec was the precursor to the generalization of public support for cultural industries (Rouet, 1991).

Another important stage was the government legislation adopted December 22, 1978, establishing Quebec's culture and communications development corporation: the Société de développement des industries de la culture et des communications (SODICC). This public corporation fosters the development (with financial tools such as loans, loan guarantees, and participation in capital stock) of culture, communications and built heritage. The stated objectives were to maximize job creation, increase exports, involve traditional financial institutions, and apply certain economic development approaches (normally applied to the manufacturing sector) to culture. It was hoped that SODICC would allow the ministry to focus on defining major directions, regionalizing a number of responsibilities, and delegating management functions to autonomous special interest organizations. Starting in the early 1980s, MAC gradually decreased its direct interventions in Quebec institutions equipped either with their own legislation or with public corporation status involving a board of directors (Quebec's National Library, museums, etc.). This shift marked an important administrative decentralization.

Year after year, the number of public organizations or autonomous corporations increases considerably (Société générale du cinéma, Institut québécois du cinéma, Régie du cinéma, Commission des biens culturels, Société de développement de l'industrie de la culture et des communications, Institut québécois de recherche sur la culture, Musée du Québec, Musée de la civilisation, Musée d'art contemporain, Régie du Grand Théâtre de Québec, Régie de la Place des Arts, Commission de reconnaissance des associations d'artistes, Bibliothèque nationale, and Radio-Québec (now Télé-Québec). This coordination trend constitutes an increase of horizontal rather than vertical responsibilities.

In order to rationalize and group together government structures, the Robert Bourassa Government (re-elected in 1985) decided in 1987 to merge SODICC and Société générale du cinéma into a single state corporation under the banner Société générale des industries culturelles (SOGIC) - a decision that joined together all government activities in the cultural industries sector. Within the context of tumultuous constitutional negotiations (Meech Lake and the attempt to redefine the political relationship between Quebec and Canada), the ministry put an emphasis on the "Quebec identity" aspects of its cultural policy. The objectives were to promote the development and influence of Quebec's cultural identity and dynamism in the arts, letters, cultural industries and heritage.

This combination of collective identity and economic objectives (job creation and competitiveness on the international stage) is particularly evident in the report produced by the Groupe-conseil sur la politique culturelle du Québec (Quebec cultural policy advisory group), chaired by Mr. Roland Arpin (Groupe-conseil sur la politique culturelle du Québec, 1991). In 1992, to follow up on the Rapport Arpin, the Bourassa Government made public *La politique culturelle du Québec : Notre culture, notre avenir* (Quebec's cultural policy: Our culture, our future), in which three directions of a new cultural policy were developed:

	Strategic	Recherche	
Paper from the	Research	et analyse	SRA
Accounting for Culture Colloquium, November 13-15, 2003	and Analysis	stratégiques	

cultural identity assertion (the French language, cultural heritage and a dialogue of cultures); support for creators and for the arts (including cultural industries); and citizen access to and participation in cultural life. Ministerial activity would centre on policy directions, follow-up, and an increasing focus on coordination of actions. The ministry would be responsible for the decentralized management of programs linked to heritage and cultural facilities as well as manage cultural development agreements with municipalities and regional governments. The ministry's regional branches, in collaboration with the conseils régionaux de la culture (regional consultation boards), would be responsible for planning regional activities.

As a direct result of suggestions made in *La politique culturelle du Québec*, the ministère des Affaires culturelles became the ministère de la Culture et des Communications (MCC), effective January 1, 1993. In addition to former responsibilities (museums, cultural and scientific heritage, arts, letters, libraries, cultural industries), the ministry's new responsibilities include media, telecommunications, teledistribution, new information technologies, the information highway and francophonie. The ministry, in the context of globalization, massive distribution of American cultural products, multimedia conglomerates and accelerated technological development, must coordinate a cohesive set of actions for each of these "new" economy sectors, and leave the selection of major directions to the principal players of the field. The ministry also coordinates the activities of government, culture-related ministries and public organizations. As electronic images and sounds become the modern vehicle of l'identité québecoise, cultural industries become the priority of Quebec's economic development strategy. The prime objective of cultural policy is to better position Quebec businesses within domestic and international markets, thereby making economic policy a good fit inside the government's industrial clusters strategy.

The Parti Québécois, re-elected in the fall of 1994, intensified the ministry's coordination role and established l'identité concerns as a significant presence in cultural industries. A national training school for cinema and audio-visual arts was created under the banner Institut national de l'image et du son (National institute of image and sound). The government launched a broad developmental program for the information highway. On April 1, 1995, it merged SOGIC, the Institut québécois du cinéma and certain mandates of the MCC to create the Société de développement des entreprises culturelles (SODEC). The former government, whose adoption of Bill 14 created SODEC on June 17, 1994, decided upon this merger as part of a growing trend that involves broad sectors of the cultural industry in the Quebec economy.

Like its predecessors, SODEC is a state corporation within the jurisdiction of the MCC. SODEC's mandate is to promote and support the establishment and development of cultural companies (including media firms) in all regions of Quebec. As with SOGIC or SGC, the criteria for government grants (specifically, performance indicators) are based on the business plan as well as the production, distribution and export of cultural products and the competitiveness of those products. SODEC acts alongside cultural enterprises to promote quality products and services through stable businesses, structure-building initiatives, targeted interventions in concert with the Conseil des arts et des lettres du Québec (Quebec council of arts and letters), simpler management models, and ongoing evaluation of economic spin-offs. Accordingly, a financial, industrial and economic approach is fully applied to culture.

Given that SODEC is granted such a major role, MCC focuses fully on a coordination role in relation to established organizations and funding bodies. In 1994, the creation of the Conseil des arts et des lettres du Québec (CALQ) accentuated this trend. While under the authority of the MCC, CALQ independently selected the artists and projects (in visual arts, letters, dance, theatre, etc.) to which they gave their financial support. The Sommet socio-économique, convened by Premier Lucien Bouchard in Fall 1996, confirmed the orientation

Paper from the
Accounting for Culture Colloquium, November 13-15, 2003

Strategic	**Recherche**
Research	**et analyse**
and Analysis	**stratégiques**

SRA

of Quebec society towards government support of the economies of culture, audio-visuals and multimedia. On top of existing tools, the MCC created and funded the Fonds d'investissement de la culture et des communications (a culture and communications investment fund) to inject venture capital into companies engaged in structure-building projects. The overall objectives are quality French-language services and content as well as job creation and competitive cultural enterprises. However, very little is mentioned about a national or collective identity in MCC documents dated after 1995 (compared, for instance, to those of 1990 to 1993). The attention is now on cultural identity most commonly defined from a personal-development perspective. Building the Bibliothèque nationale du Québec (National library of Quebec) demonstrated a will to affirm the collective identité québécoise However, actions taken by the MCC in the realm of culture are directed more towards the arts as a contributor to the development of the individual - a point made in the annual program of the Journées de la culture (the "days of culture").

We may also note, among the directions set out by the MCC, an important increase in transfer expenditures made on behalf of public corporations and other decentralized organizations. Decentralization (towards regional levels of government and municipalities) is also on the agenda, as is the intensification of partnerships with the private sector, the professional class and citizens (Ministère de la Culture et des Communications [Québec], 1999). Under Louise Beaudoin and Agnès Maltais, the MCC moved towards the democratization of culture and access to knowledge, the production of French-language services and content (cultural industries and multimedia), and the adaptation of companies to 21st century economic realities. The MCC also emphasized the development of sectoral policies (e.g. a books policy or a museums policy).

1.2.   Indicators

As we have seen, SODEC is a key player within the Quebec cultural milieu. Accordingly, its evaluation criteria for grant-supported projects, organizations and businesses are of critical importance. Now, SODEC's activities are essentially directed towards consolidating existing companies (with more capital and more regular funding) and promoting businesses that are performing very well on domestic and international markets, while at the same time supporting the most fragile stages of the creative process (multimedia, in particular) and encouraging project development. The performance indicators adopted by SODEC are, therefore, essentially economic and even financial. For example, support given to a film producer is based mostly on estimates of a screenplay's commercial potential and past box office records of the producer. No evaluation is made of the film's impact on personal identity, the community or l'identité québecoise.

Statistics are the responsibility of the Observatoire de la culture et des communications du Québec (affiliated with the Institut de la statistique du Québec). This observatory, created at the end of the 1990s, is charged with the collection of data and indicators. Its mandate is to develop an integrated system for statistics in the fields of culture and communications as well as to develop partnerships with art, government and academic communities. Additionally, it must document the importance of this sector within Quebec society. The Observatoire has adopted a broad definition of "indicator," (a definition inspired by the Conseil des affaires sociales et de la famille), and it reads as follows: "Particularly significant statistics able to summarize information, inform quickly on the state of a phenomenon, or make intelligible the processes and changes taking place in a given society," (Observatoire de la culture et des communications du Québec, 2002a, p. 2.). However, the observatory limits this approach significantly by accepting only standard quantitative and economic indicators (total numbers, characteristics [describing the artists], incomes, establishments

Paper from the
Accounting for Culture Colloquium, November 13-15, 2003

Strategic	**Recherche**
Research	**et analyse**
and Analysis	**stratégiques**

SRA

and infrastructures, consumption, attendance, cultural practices, preferences, timetables, government spending, etc.).[1] This data is compiled and updated regularly (OCCQ, 2003).

OCCQ cites its mission as one to produce indicators derived from the analysis of existing statistics. As a result, there are no research surveys to articulate a problematic situation and no content analysis of messages and symbols. It is a measure of the supply and demand of cultural products and services - from creation to consumption. (For an example, see OCCQ, 2002b).

A principal quality of these statistics is their regularity (ongoing since the end of the 1970s) as well as their reach. All categories are now studied, including visual arts, media arts, crafts, performing arts, heritage, museums, institutions, archives, books, periodicals, libraries, cinema and audio-visuals, sound recordings, radio and television, multimedia and new media, architecture and design, advertising and public relations, art schools, cross-cultural relations, language, lobbying organizations, multidisciplinary activities and cross-sectoral establishments. Cultural practices surveys further include crafts which one makes for oneself – a category that demonstrates a widening of the range of indicators (Institut de la statistique du Québec, Observatoire de la culture et des communications du Québec, 2003). Moreover, OCCQ is currently developing – in partnership with several Quebec cities – indicators of cultural activities and participation that takes place in an urban setting. For the moment, the emphasis is on the consolidation of basic data. Les Arts et la Ville, an organization that serves as a meeting point and resource provider for Quebec municipalities involved in culture-related activities (it campaigns for the active involvement of local governments in cultural policy), has developed only basic indicators. However, these developments may clear a path for indicators that are not strictly based on economics. For its part, the Conseil des arts et des lettres du Québec distributes an e-bulletin (Constats du Cala) that contains just basic data.

The work of Gilles Pronovost confirms those trends which put an emphasis on descriptive studies. His research underlines the fact that no relationship exists between cultural participation and other factors (family, school, work, community). In short, very little is known about the context of cultural practices and their wider social impacts (Gilles Pronovost, 2002).

The economic justification of Quebec's cultural policy is therefore consistent with the indicators being developed. At the same time, the other identified aims (collective identity, personal development) are not reflected within the realm of indicators – with the possible exception of indicators newly developed with municipalities. Because there are few tangibles linked to the arts and its contribution to society at large (urban revitalization, the fight against social exclusion, enrichment of communities, health…), logic dictates that indicators attempting to measure such broader cultural impacts do not exist.

2.   The European Union

2.1   *Context and justification of cultural policy*

Economic, political and legal issues have historically dominated the development and consolidation of the European Union and its diverse institutions. The Council of Europe began collecting statistical data on cultural policies as early as 1985, but it was not before 1992-1993 that the Maastricht Treaty (establishing the European Union) gave the Council powers to act within member states in the fields of culture and audio-visuals. After

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[1] An interview conducted with Mr. Bernier, OCCQ Director (November 4, 2003), confirmed these directions.

Paper from the
Accounting for Culture Colloquium, November 13-15, 2003

Strategic	Recherche
Research	et analyse
and Analysis	stratégiques

SRA

establishing appropriate structures, the goal was to establish a free trade zone and monetary union and to develop a genuine European citizenship. Culture and the new means of communication were to become the principal driving forces behind the development and creation of a common European social and cultural environment. Article 128 (later to become Article 151 of the 1997 Amsterdam Treaty) defines four principal objectives:

1) Contribute to the opening up of member state cultures (with respect to national and regional diversities) while emphasizing a common heritage (notably, public access to a European heritage).
2) Promote the creative arts.
3) Give the European political framework a sound cultural dimension.
4) Encourage cultural cooperation between member states as well as between the EU and non-member states (for example, artistic cooperation among professionals).

Several programs were created during the 1990s (notably, the ongoing European Cities and Capitals of Culture program). It was, however, the Culture 2000 program which led the European Commission, through its Education and Culture Division, to establish a mechanism designed to achieve the targeted objectives. The program, operational from 2000 to 2004 (and likely to be renewed in 2005 and 2006), has since widened to include candidate countries for membership in the EU. As a result, the program affects 30 countries (the 15 EU member states, the 12 candidate countries and 3 countries from the European economic space). The program's principal objectives emphasized the development and enhancement of a common cultural environment. Culture is perceived both as a factor of social and political inclusion (symbolic actions promote a sense of belonging to a community and to a shared European social space) and as a lever for socio-economic development (jobs, cultural industries, international competitiveness). The goal, therefore, is a proper balance between economic factors (jobs, competitiveness) and identity factors (culture, community development), (see Viviane Reding, 2003b). It is also a balance between globalization and cultural diversity (Viviane Reding, 2003a).

Art projects are then developed with a European dimension and all sectors involved. Youth and economically disadvantaged populations are particularly targeted. The mobility of artists, the circulation of art works, intercultural exchanges, multilingualism and multiculturalism are all encouraged. Additionally, regional and local levels are given priority, particularly through money allocated to culture by way of structural funds for regional development.

At the start of the 21st century, another general premise underlies European politics as a whole: responsibility for cultural issues is (and must increasingly be) shared between public sectors, private sectors and civil society operating in networks. What is proposed, therefore, is the "creative governance" concept (European Institute for Comparative Cultural Research, 2003). The recommended philosophy is redeployment (and not withdrawal) of traditional state intervention in partnership with regional and local players. Dorota Ilcuzk conducted a study of nine European states, concluding that cultural policy is increasingly influenced by citizen participation (2001). States are loosening their grip on direct management of culture but maintaining their culture-funding levels. With a combination of increased assertions by outside sectors (group associations, foundations, churches, non-profit unions), a relaxation of the traditional relationship between public institutions and the state, a growing importance of regional and local levels, and a new approach that distances itself from elitism, culture is emerging as witness to citizen empowerment and democratization of management methods.

Paper from the
Accounting for Culture Colloquium, November 13-15, 2003

Strategic	Recherche
Research	et analyse
and Analysis	stratégiques

SRA

2.2. Indicators

To date, evaluations have focussed mainly on basic indicators. The European Institute for Comparative Cultural Research (ERICarts) carried out a vast empirical and conceptual survey (European Institute for Comparative Cultural Research, 2003). Additionally, ERICarts developed and routinely updated an extensive statistical and qualitative index examining the history, policies, institutions, responsibilities, administration, funding, goals, recent claims and legal environment of cultural policy among European countries (Cultural Policies in Europe: A Compendium of Basic Facts and Trends). An impact evaluation of Culture 2000 is underway (with findings to be published in 2004). The European Commission recently announced (August 2003) that it will carry out a vast study in 2004 on the set of methods best able to link culture to formal, non-formal and informal education in Europe. The Commission also plans to create the European Observatory on Cultural Co-operation.

There is no doubt that the indicators of choice will be economic as well as a wider integration of aspects linked to cultural impacts on societies and communities. The European Commission underscores this by defining the success of state regulation, policy and programs (supporting the creative arts) based on how well they guarantee that innovative ideas and products are made and distributed (economic aspect) and contribute to local and regional cultures (social impacts). To this end, new criteria (indicators) and a new information system will soon be developed with a challenge to establish relatively standardized indicators regarding quality of life for individuals and communities. The European Task Force on Culture and Development mentions the importance of taking the social impacts of culture into account (individual development, community development, the capacity to innovate, etc.) [1997].

A resolution on European cultural cooperation (titled the Ruffolo Report) was adopted in September 2001. It anticipated that European cultural space would be reinforced through an expanded role for culture in the areas of social cohesiveness and diversity. The goal was for culture to become a key player in the building and extension of Europe's political and economic foundations. The resolution asked the Commission to produce an annual report to Parliament on the cultural policy of Europe and its member states. It also recommended the creation of a European Observatory of cultural policy for the purpose of standardizing statistics and developing indicators.

3.   The United Kingdom

3.1.   Context and justification of cultural policy

The British engagement in the cultural sector originates from the 1940s when the arts started to be perceived, in the context of World War II, as instruments promoting a free and democratic society. The government created the Council for the Encouragement of Music and the Arts (CEMA), under the leadership of John Meynard Keynes. The Council was renamed the Arts Council of Great Britain in 1946. It was one of the world's first government agencies to distribute public funds to artists "at arms-length," (the celebrated principle of keeping political pressure at a distance). In 1948, the government provided cities with the legal right to become involved in the arts. In 1965, the responsibility for the Council shifted from the Treasury to the Department for Education & Science, and a minister responsible for the arts was named. A first cultural policy was adopted that significantly increased the funding provided to the Council. As in other Western countries, the U.K. was marked (during the 1970s) by a debate on the definition of culture. The Council was increasingly criticized for funding only artists and institutions that corresponded to an "elitist" cultural approach. The Council also closed its regional offices and regional associations were developed.

During the 1980s, in the context of wide budget cuts and neo-liberal policies of the Thatcher government, there was a recognition that new sources of funding had to be found. An emphasis was put on the "marketing" of art works and artists, and the economic impact of culture was underlined. The Department of National Heritage was established in 1992. A national lottery was created in the 1990s, initially to fund infrastructure and public facilities projects (museums for example), and later on, increasingly, to fund local and community projects. In 1997, the new Labour Government of Tony Blair created the Department for Culture, Media and Sport (DCMS) and increased the available funding. The "arms-length" principle remained as DCMS funded a range of non-departmental public bodies (similar to our public corporations and various commissions) that distributed funds and took responsibility for the selection of funded projects. In 2002, the Arts Council was reunited with the regional associations to create a single, strongly centralized structure. It is worth noting that municipal authorities also have an obligation to develop cultural policies.

From a global perspective, the current objectives of the cultural policy (DCMS, 2001a) are two-fold: contribution to economic development and improvement of the quality of life of individuals and communities. The British government emphasizes, therefore, the economic impacts (creation of an efficient, competitive cultural market, development of cultural industries, promotion of British culture abroad, cultural tourism), social impacts (contribution of culture to urban and rural revitalization and to the fight against exclusion) and education impacts (better universal access to the arts, development of arts training and education in order to have, at last, a competent workforce within the culture and tourism industries). Consequently, there is government recognition that culture plays an important role in the more global objectives of promoting social inclusion and urban revitalization. According to the Arts Council (2003-2006 Plan), culture has a major influence on the identity of communities, the improvement of public health and the fight against crime. The government is aiming to publicize the "transforming powers" of the arts in individuals and in community life.

The other social justifications that support public cultural programs funding (funding that has been constantly increased by the Labour government since 1997) are: promotion of racial equality and preoccupation with cultural minorities (Decibel program - raising the voice of culturally diverse arts in Britain of the Arts Council of England; creation of the National Cultural Diversity Network for museums, bookstores and archives; emphasis on festivals and theatres fighting racism); gender equality and women's rights advocacy; linguistic diversity (the United Kingdom has signed the Council of Europe's Charter for Regional or Minority Languages); youth involvement (National Advisory Committee on Creative and Cultural Education, 2000); and a contribution by heritage to quality of life, employment and the regeneration of cities, rural landscapes and communities (DCMS, 2001b). New technologies are also brought forward (Culture Online program), motivated by economic, social and educational factors.

This is all taking place in the context of better dialogue between London and the regional/local authorities (by way of partnerships), and in the framework of a decentralization of the arts towards Scotland, Wales and Northern Ireland. Public-private partnerships are also encouraged. The government recognizes the role of volunteer work and the amateur arts in the development of local communities (creation of the Voluntary Arts Network in support of various projects). As a result, more and more emphasis is put on local level projects that involve civil society, the private sector, the city, regional political structures, and the British government (Landry, et al, 1996).

3.2.   Indicators

In accordance with cultural policy justification, the Performance indicators developed by the British government (in this case, DCMS assisted by the Quality, Efficiency and Standards Team [QUEST] and the Arts Council of England), were two-fold: economic and social. An evaluation of the economic impact was regularly presented in the Creative Industries Mapping Document (2001c) and in Arts in England (2002). In these documents, one can find basic, traditional data (production, consumption, audiences, etc.) as well as a set of indicators revealing an expanded concept of culture (participation at a carnival, cultural festivals, street art, circus, mime, all dance performance genres, video and electronic art performances). From a social-impact perspective, an evaluation was also done on how people perceived the role of the arts in their lives (their attitudes and opinions), as well as on the involvement of individuals from ethnic communities and young people over the age of six. Local authorities were involved (see the 2002 evaluation of the National Policy for Theatre in England) and support was provided to cultural organizations for their self-evaluations. Through targeted analysis and qualitative and quantitative methodology, the government evaluated the contribution of the arts to the fight against social exclusion (Carpenter, 1999; Jermyn, 2001). This was how the development of culture, self-confidence and individual potential was examined: community efforts and a stronger local identity were encouraged; positive interpersonal relationships were built; and assets for job finding were provided. DCMS plans to put an emphasis on these social indicators in the future (DCMS, 2003).

The Arts Council was also doing considerable research into the development of social indicators (2000, 2003). As early as 1993, the Council was subsidizing Comedia (a British organization specializing in cultural policy research) in order to evaluate the social impact of the arts, based on a series of case studies. The findings were published in 1997 in *Use or ornament?* (Matarasso, 1997). The paper established a methodological framework to examine the social impacts, and provided precise evaluation instruments. The paper's publication coincided with the election of the Labour Government and, on the one hand, its will to include culture in the revitalization of cities and the fight against exclusion, and on the other hand, its desire to bring more efficiency and accountability to civil service and government structures. And as mentioned above, changes occurred in public funding (stemming from the national lottery) as a result of grants being redirected from large projects to cultural facilities and then on to small projects run by local associations and organizations. In order to attract maximum funding, these organizations had a powerful incentive to develop indicators that highlighted the social impact of their projects.

Numerous other studies have also focused on the social impact of culture. According to Landry, et al. (1993) and Lingayah, et al. (1997), focusing on social impacts means examining all the effects (or results) that go beyond the production of cultural products or events and have an influence on individuals and the community in general. In this way, a distinction is made between "outputs" (the product or event) and "outcomes" (the social consequences of making a product or event). Landry, et al (1996), Matarasso (1996, 1997), Moriarty (1998), Shaw (2000), Kelly and Kelly (2000), Blake Stevenson Ltd. (2000), and Jermyn (2001) all considered the development of social indicators. For example, Landry, Matarasso, et al. from Comedia (1996) examined 15 case studies of the links between the arts and urban renewal programs, social cohesiveness and local identity.

Matarasso (1997), from Comedia, analyzed the social impacts of several cultural projects from numerous British cities based on six general themes: personal development, social cohesiveness, community empowerment, identity and local image, imagination and vision, health and wellbeing. He has made a list of 50 social effects, presented in Chart 1. The list can form a basis for the development of indicators.

Chart 1   Matarasso Indicators (1997)

• Increase people's confidence and sense of self-worth	• Facilitate the development of partnership
• Extend involvement in social activity	• Build support for community projects
• Give people influence over how they are seen by others	• Strengthen community cooperation and networking
• Stimulate interest and confidence in the arts	• Develop pride in local traditions and cultures
• Provide a forum to explore personal rights and responsibilities	• Help people feel a sense of belonging and involvement
• Contribute to the educational development of children	• Create community traditions in new towns or neighbourhoods
• Encourage adults to take up education and training opportunities	• Involve residents in environmental improvements
• Help build new skills and work experience	• Provide reasons for people to develop community activities
• Contribute to people's employability	• Improve perceptions of marginalized groups
• Help people take up or develop careers in the arts	• Help transform the image of public bodies
• Reduce isolation by helping people to make friends	• Make people feel better about where they live
• Develop community networks and sociability	• Help people develop their creativity
• Promote tolerance and contribute to conflict resolution	• Erode the distinction between consumer and creator
• Provide a forum for intercultural understanding and friendship	• Allow people to explore their values, meanings and dreams
• Help validate the contribution of a whole community	• Enrich the practice of professionals in the public and voluntary sectors
• Promote intercultural contact and cooperation	• Transform the responsiveness of public service organisations
• Develop contact between the generations	• Encourage people to accept risk positively
• Help offenders and victims address issues of crime	• Help community groups raise their vision beyond the immediate
• Provide a route to rehabilitation and integration for offenders	• Challenge conventional service delivery
• Build community organisational capacity	• Raise expectations about what is possible and desirable
• Encourage local self-reliance and project management	• Have a positive impact on how people feel
• Help people extend control over their lives	• Be an effective means of health education
• Be a means of gaining insight into political and social ideas	• Contribute to a more relaxed atmosphere in health centres
• Facilitate effective public consultation and participation	• Help improve the quality of life of people with poor health
• Help involve local people in the regeneration process	• Provide a unique and deep source of enjoyment

Paper from the
Accounting for Culture Colloquium, November 13-15, 2003

Strategic	Recherche
Research	et analyse
and Analysis	stratégiques

SRA

Matarasso maintains that culture can be evaluated according to numerous indicators: development of self-confidence and various personal skills (planning, seeing a project to its end…), improvement in the communication of ideas and information, development of educational potential, creation of social capital (reciprocity, civic cooperation, mutual trust within networks, capacity for community action development (Putnam, 2000), strengthening of communities, and development of a collective, local and national identity), a reduction in the area of social exclusion, better understanding of different cultures, improved social cohesion and reduced tensions/crimes, activation of social change, increased public awareness concerning certain socio-political issues, improved physical and mental health and well-being, and contribution to urban revitalization.

In order to evaluate the local impact of culture, François Matarasso has also developed three major impact types along with corresponding indicators (1999). First, there are indicators linked to "inputs" with basic data (number of cultural facilities, organizations and artists, culture expenditures at the different government levels, and national, regional and local cultural policies). Second, there are indicators linked to "outputs" such as the impact of activities, access and participation (number of performances and events, audiences, scope of participation), the diversity of the cultural supply-side and the involvement of ethnic minorities, education and training, and economic impact (jobs, return on investments, etc.). And third, there are targeted outcome indicators such as personal development (self-confidence, a more active social life, personal identity, project management capability, improved physical and mental health) and community development (inter-generational and inter-cultural contacts, cooperation, crime reduction, capacity for change, collective identity, urban environmental improvements, volunteer work and help).

Kelly and Kelly (2000) have developed a questionnaire to gather information from thirteen sectors. Chart 2 shows the adopted indicators. There are some traditional economic indicators (indicators 1 to 7), and others to measure the social impacts (indicators 8 to 12).

Chart 2   **Kelly and Kelly's Indicators (2000)**

Impact	Indicators
1. Organisation	Art form and activities, amenities provision and opening hours.
2. Income	Contributed income– grants, lottery awards, donations, sponsorship, earned income admissions, sales, fees, membership, room hire, café/bar, bookshop, interest.
3. Outgoing	Staff costs – wages, travel, training, running costs, marketing, fund-raising, VAT, National Insurance and PAYE, local trade as percentage of turnover.
4. Capital Improvements	Income and expenditure.
5. Attendances and performances	Total number of audience opportunities (for example, performances, cinema screenings) in city/town, region, nationally and internationally, number of admissions/attendees (paid full, concessions, free, website and hits.
6. Staffing	Paid, full- and part-time staff and

	volunteers, mix of artistic, marketing and technical staff, board.
7. Current and Future Plans and Challenges	Facilities development
8. Cultural Benefits and Impact	Work which took place which otherwise wouldn't have reached the area, new work created, role of organisation in promotion of a positive image for city/town, contribution to tourism.
9. Social Capital	Contribution to the communication of ideas, information and values, helping improve participant's skills in planning and organising, improving understanding of different cultures and lifestyles, improving the understanding of the role of arts and culture in the community, partnership building, active membership of staff/board in other organisations and artistic collaboration with others.
10. Building and developing Communities	Contribution to developing sense of community identity, social cohesion, recreational opportunities, development of local enterprise, improvement of public facilities and amenities, and help to convey history and heritage of an area.
11. Social Change and Public Awareness	Contribution made to stimulating and developing public awareness of important issues and changing people's attitudes on political, ethnical, religious or moral issues.
12. Human Capital	Contribution to improving participant's human and communication skills, analytical and problem-solving skills, creative talents, and social awareness.

The Arts Council, in collaboration with West Midlands Arts, Comedia and the New Economics Foundation, conducted further evaluative research concerning the actions of the Belgrade Theatre. The relationships between theatre and the arts, the community and the city (as well as other types of organizations) were examined according to indicators combining economic, social and cultural aspects (Matarasso and Pilling, 1999).

The New Economics Foundation also developed social indicators linked to human capital (self-confidence, self-esteem, attitudes towards living space, acquiring skills and knowledge, involvement) and to social capital (reciprocity, participation within community organizations, networks, collectively developed and realized projects, partnerships) [see Walker, et al, 2000]. Social capital, referred to by Putnam as components of community life allowing citizens to act together more efficiently in pursuit of common goals, constitutes a particularly important element of these social indicators.

The firm of Annabel Jackson Associates did an evaluation of the social impact of the Millennium Awards (2000). They identified four zones of impact and developed the appropriate indicators. Chart 3 presents the evaluation outline.

Chart 3   **Annabel Jackson Associates Indicators (2000)**

Impacts	Indicators
Develop personal skills	• confidence • motivation • team working • leadership • communication and public speaking • negotiation skills • literacy/numeracy • other skills
Develop personal knowledge	• environment • health • social issues • community
Develop personal practical experience	• making something • how to engage the community • research • arts and sport • teaching or training others • caring, therapy • computing • managing projects • business planning • fund raising • media and publicity
Community impacts	• raised awareness of an issue • provided new service or facility • improved the quality of life • improved the environment • reduced isolation/enabled networking • increased local pride • strengthened links within the community • increased understanding of local history

Jermyn (2001) has developed an evaluation framework to analyze 18 cultural projects. She has identified four major categories and corresponding indicators, as presented in Chart 4.

Chart 4   **Jermyn indicators (2001)**

Impacts	Indicators
Direct impacts	• Improvements in the fields of health and education • Reduction of crime • Better employment rates
Human capital	• Self confidence and self esteem • Acquisition of skills • Future prospects
Community impacts	• Social contacts • Tolerance • Team work • Interpersonal relationships
Civic impacts	• Community involvement • Community identity • Local democracy • Active community

It should be noted that most methods take a multifaceted approach when collecting both quantitative and qualitative data in surveys, interviews, case studies, focus groups, observations of participation and self-evaluations. The development of indicators that may extend beyond the economic aspects (and still respect the basic principles of governance) requires the use of a joint quantitative and qualitative approach from which a maintenance outline is developed with citizens to facilitate the emergence of participants' viewpoints.

4. Discussion: Broadening performance indicators - range and limits

We step back to identify, in more general terms, the range and limits of a wider concept of cultural indicators.

4.1. Indicators in synchrony with a local level resurgence

It is particularly interesting to note that the preoccupation with developing widened cultural indicators is part of a local level, Western World resurgence and a growing affirmation of the political role of indicators. Canadian cities, having experienced major disruptions throughout the last two decades, are no exception. Among these transformations, two phenomena appear particularly important. First, we observe an intensified political role for municipalities (Andrew, Graham, and Philips, 2002) and second, we notice their increasing responsibilities within numerous polymorphous sectors – a faithful reflection of shifting provincial responsibilities and recent processes of territorial restructuring of local governance (amalgamations). Although past-governed exclusively at the provincial and federal levels, social issues pertaining to culture, transit, environment, poverty, immigration, heritage preservation, sustainable development, the role of certain identifiable categories (women, ethnic communities, homosexuals and the handicapped), etc., are now increasingly reformulated on the territorial basis of cities. The need for integrated public policy combining several sectors of intervention also places cities in a position of strength. This is because cities are presumed to be closer to groups and institutions and also presumed to have more flexible bureaucracies.

Furthermore, the local level enjoys a privileged relationship with citizens that creates a space allowing for policy expression as well as collective deliberation (Hamel, 2002). This is how we can see (since the 1990s) the emergence of references to sustainable development, coordination, and citizen integration in public debates on the planning of urban environment and cultural development. In the wake of amalgamation, the cities of Quebec City, Montreal and Gatineau have all undertaken vast public consultations to establish strategic plans defining the principal parameters of city development. These three cities have also adopted a cultural policy proposing a broad approach that positions culture at the precise point where economic, social and community objectives are realized.

It is from this perspective that Mario Polèse and Richard Stren underlined the contemporary importance of what they refer to as "social sustainability," defined as "development (and/or growth) that is compatible with the harmonious evolution of civil society, fostering an environment conducive to the compatible cohabitation of culturally and socially diverse groups while at the same time encouraging social integration, with improvements in the quality of life for all segments of the population," (Polèse and Stren, 2000, p. 15-16). According to the authors, this capacity for social development and support, while linked to national policies (social, immigration, fiscal, etc.), is above all linked to decisions and directions (concerning governance, cultural policies and social policies) defined at the local level.

Paper from the
Accounting for Culture Colloquium, November 13-15, 2003

Strategic | **Recherche**
Research | **et analyse**
and Analysis | **stratégiques**

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4.2. Indicators linked to good governance

The establishment of broadened cultural indicators is equally in line with certain developments linked to the concept of governance (Poirier and Andrew, 2003). Cities have been forced to review their political process and integrate principles of urban governance due to the economic development imperative, the logic of competition between cities (to attract investments), the need to fight social exclusion, and increased sectoral involvement by municipalities following more senior-level government downloading (Le Galès, 1995, p. 75). Bagnasco and Le Galès define governance as "a coordination process for actors, social groups, and institutions to reach goals discussed and defined collectively in fragmented, uncertain environments." (Bagnasco and Le Galès, 1997, p. 38). Governance questions traditional methods of regulating the economy with Keynesian policies, and of regulating the social sphere with the welfare state (Chiasson, 1999, p. 15). Governance reflects a search for intermediary mechanisms and new forms of collective management between price regulation (the marketplace and its anarchic logic) and hierarchical regulation (government and its directive logic) [Proulx, 1999, p. 62].

While proposing a revision of shared responsibilities between the state and civil society, governance could establish administrative and political coordination mechanisms based on civil society (groups) and private sector involvement, horizontal coordination, negotiation, polycentrism, networks, ongoing training, bureaucratic flexibility, social capital, and urban intelligence – and not based on inflexible, hierarchical, "top-down," authoritarian decisions by elected officials or experts (Jessop, 1998; Paquet, 1999; Stoker, 1998). As such, governance refers to interactions between state and society as well as to methods of vertical and horizontal coordination of public action. It involves a reformulation of collective action mechanisms and the presence of players and institutions (with respect to concrete management of public affairs) from outside the traditional government sector. In theory, governance must not only take into account the diversity of legitimization procedures related to public action, but account for the dynamic of negotiations between players (above all else). The objective is to involve associations and the private sector in decision-making and service management. From within this context of governance, therefore, the role of the state is less to direct and more to coordinate and guide (the "state as guide"). As we have stressed several times, recognizing the social impact of culture implies a parallel interest in those players directly involved in the various cultural activities (artists, managers, citizens, etc.).

4.3. Important challenges

We may now consider the principal challenges related to the development and gathering of expanded performance indicators.

The first challenge is to attain a good balance combining quantitative and qualitative approaches. While it is important to develop more qualitative indicators, the production of quantitative indicators must not be overlooked.

Later on, it may become particularly difficult to quantify the general social impacts which create long-term effects only (Galloway, 1995). Moreover, how can we identify and differentiate between social impacts in the short, medium and long terms? Developing indicators for concepts as broad and complex as identity, community, social capital, (and others) is also not easy. In this regard, more hard data is required and an increased number of case studies (so that pertinent indicators may emerge) is imperative (Arts Council of England, 2003). It is also very important to distinguish between the specific impacts produced by cultural initiatives. In other words, we need to ask if identified social impacts are linked to the arts alone or are they connected to other factors as well. The risk, in this

case, is to oversimplify by establishing a cause-effect link between a cultural activity and a broader social impact.

Notwithstanding the important progress made in England, there is still no cultural sector consensus on the development of common, broader performance indicators (a result of the diversity of programs, funding methods and supported projects). It seems particularly difficult to make generalizations based on case studies that are sometimes hard to compare. It is important, therefore, to develop standardized questions that allow us to achieve systematic comparisons while respecting local specificity and variance.

In reference to organizations and artists, Matarasso (1996), Moriarty (1998), Shaw (2000), and Jermyn (2001) have all emphasized that artists and managers in the cultural realm rarely consider evaluation and monitoring as integral parts of their creative work. Thus, an evaluation of economic, social and cultural impacts is perceived as an additional and secondary task, one that (if done properly) requires the time and resources that artists and organizations don't have. Additionally, the measure of performance is made according to government-defined criteria (i.e. financial terms). These criteria do not give organizations the incentive to evaluate the community impact of their activities. Governments must recognize citizens, program managers and artists not simply as survey subjects but as partners in the creation and establishment of evaluation studies. On the other hand, these individuals must develop the impulse and tools required to systematically collect data based on their knowledge and experience. To this end, governments must provide the resources and expertise needed to facilitate a cohesive and systematic base for collecting data linked to specific indicators.[2]

There is also the fear that evaluations may greatly weaken the complexity of the artistic process. Some artists worry that an evaluation of the economic and social impacts of the arts would reduce culture from being an end in itself to the means by which other ends are achieved. The risk, ultimately, is a global devaluation of culture. In short, measures must <u>not</u> replace our faith in the importance of culture.

Conclusion

This study has examined the sometimes harmonious, sometimes conflictual relationship between justifications of cultural policies and the performance indicators used to evaluate these policies. As we have seen, Quebec demonstrates an important dichotomy between these elements based on legitimizing the purposes of public cultural activity through economic, identity, and personal development requirements while, at the same time, positioning indicators under basic economic categories. Yet efforts to develop cultural partnerships between government and cities point to a movement (particularly from within non-cultural groups) towards increased recognition of the importance of culture. The increasing involvement of Quebec municipalities in the cultural sector can only encourage a broader conception of the social impacts of culture to emerge. That said, culture is still not perceived as a tool able to contribute to community, education, health and social services improvements. Consequently, no indicator addresses these aspects despite their increasing importance.

The European Union, and the United Kingdom in particular, presents a better balance between justifications and indicators. There are many goals that address the principles of economic, social and personal development as well as community identity, urban revitalization, and more. Through a combination of quantitative and qualitative approaches (case studies, semi-structured interviews, etc.), indicators have been developed that also attempt to measure the impact of culture in these sectors.

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[2] For more information about participative evaluation, consult: Whyte, 1991 and Fetterman, 2000.

However, our literature and knowledge of the social impacts of the arts is very recent and has emerged only in the last few years. In this respect, it is essential to conduct case studies, particularly in Quebec and Canada where gaps remain. Studies from other countries should be examined, especially those of the United States (see the work of Maria-Rosario Jackson and Joaquin Herranz Jr. from the Urban Institute, 2002) and Australia (Williams, 1996, 1997) where there is an exceptional amount of activity in this area.

While its national indicators are chiefly linked to traditional, basic characteristics (Donnat, 2003), France might also constitute a preferred investigative field since more and more targeted studies tend to view the impacts of culture on communities from a broader perspective.

Furthermore, the decentralization process that started in France in the early 1980s placed local governments in a position of strength and legitimized interventions within sectors traditionally reserved for the national stage (notably culture). Studies on local cultural policies in France are abundant (see, among others, Dubois, 1996; Saez, 1985; David and Dubois, 1996; Poirrier, 1996, 1997; Taliano-des Garets, 1996; Urfalino, 1996; and Pourcher, 1995). These developments open the door to a broader conception of cultural impact on communities. After having adopted a wider concept of cultural participation, governments must now seek to broaden their approach to the impact of culture within society. Traditional performance indicators must co-exist with a new breed of cultural indicators. Not only would this allow governments to further legitimize important investments in the cultural sector (currently perceived as ends per se and as tools of other public policies such as social, identity, health, etc.), it would also demonstrate, in the ideal context of shared governance, a contribution by the arts towards creating a cultural citizenship (through civic and community commitment and the social capital implied) and strengthened communities (through a social space and common identity created with respect for diversity).

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