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Arts Panorama: International Overview of Issues for Public Arts Administration

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INTRODUCTION

The 6th World Summit on Arts and Culture with the theme *Creative Times: new models for cultural development* (Santiago de Chile, January 2014) will focus on how globalisation, shifts in social and economic development, and new forms of communication are generating an array of challenges and opportunities within the cultural field, and how this is impacting on the development of our societies and nations. In the preparation for the 6th World Summit, IFACCA and the National Council of Culture and the Arts (Consejo Nacional de la Cultura y las Artes, CNCA) of Chile launched a joint research process to prepare for the Summit. The IFACCA research focussed on the perception of the global cultural sector of the overarching themes and challenges facing the sector. The research carried out by CNCA dealt with the conceptual understanding of the main features of new models for cultural development including a set of case studies. This document presents the main findings of the IFACCA research process.

In May 2013, IFACCA invited public arts funding agencies, cultural policy experts and other members of the IFACCA network to respond to the questionnaire: *International Overview of Issues for Public Arts Administration*. This questionnaire was distributed in parallel with a questionnaire developed by CNCA in Chile. The goal of the IFACCA questionnaire was to identify the main strengths, weaknesses, opportunities and threats facing the cultural sector and governmental agencies, to provide background for discussions at the 6th World Summit.

By 1 October 2013, IFACCA had received 140 responses from 70 countries. 46 of the responses were from the Americas and the Caribbean, 43 from Europe, 35 from Africa, 8 from Australia, New Zealand and the Pacific and 8 from Asia. More than half of the respondents were independent cultural policy experts (76), 27 represented a national government agency, 12 represented regional or sub-national agency and 25 described their professional role as 'other', (which included various non-profit roles, activists, researchers, cultural foundations, experts, private institutions and academics).

The IFACCA questionnaire was based on the SWOT analysis model, a frequently used tool in policy analysis. SWOT analysis is a 'structured planning method used to evaluate the Strengths, Weaknesses, Opportunities, and Threats involved in a project, policy or in a business venture.'

The questionnaire was divided into two parts: public arts administration; and the cultural sector. In the first part of the survey, the respondents were asked to describe the main strengths, weaknesses, opportunities and threats to the public arts administration in their country. The second part was focused more generally on the cultural sector of the country. The responses were then analysed according to the 'role' of the respondent (national arts agency, subnational or regional agency, independent cultural policy experts or other). The responses were also contrasted by region to explore whether any regional differences could be detected (Africa; the Americas; Asia; Europe; and Australia, New Zealand and the Pacific).

While the respondents represented many different policy and cultural environments there was substantial consistency around the key issues. The global cultural sector shares a vision of the

cultural sector as a fundamental structure of society with important social and economic impacts. There is a strongly shared view that art and culture are crucial in critical times and need to be encouraged, protected and supported.

IFACCA would like to thank all the respondents to the questionnaire who are listed at the end of the report and Annamari Laaksonen and Natasha Eves for their work in compiling and analysing the responses.

We hope this report provides a useful overview to inform discussions at the World Summit and related IFACCA member events.

Sarah Gardner
Executive Director
IFACCA

PART 1: PUBLIC ARTS ADMINISTRATION

The first part of this report describes the views of respondents about the public arts administration in their country.

Overview of main themes

The following tables summarises the main findings by organisational type of respondent.

National government agencies

Strengths	Weaknesses
Political commitment Cooperation with civil society, arts community and other stakeholders Solid structure (arms-length) and positioning	Reliance on government funding Complexity of funding systems (including fragmentation) Lack of training and support system for arts administrators
Opportunities	Threats
Vibrant arts sector Reform of arts administration and funding structures Arts curriculum and trained professionals New technologies	Budget pressures (including further cuts) Limited number of qualified staff Political ideology Lack of recognition, accountability requirements

Regional or sub-national agencies

Strengths	Weaknesses
Professionalism Committed arts sector Visibility of the arts in the society	Inconsistent policies, strategies and funding Fragile sector for budget adjustments Poorly reflect existing realities
Opportunities	Threats
Partnerships and networking Promotion of the arts Transformation and development of new audiences	Economic instability Lack of political will to support the arts Lack of training and leadership

Independent cultural policy expert or other respondents

Strengths	Weaknesses
Professionalism, dedication and commitment Established governmental support, strong institutional structure and experience Funding levels	Economic uncertainty Lack of political support, vision and strategy Professional skills of arts administrators Bureaucracy and old working models
Opportunities	Threats
New audiences and operators Digital environment Innovative arts forms and creative industries Transnational collaboration	Funding cuts and economic crisis Political interference/intervention Shrinking arts curriculum at schools Incompetence in the sector

Public Arts Administration – Strengths

The respondents associated the public arts administration in their country mostly with strengths such as a strong sense of commitment and duty. Descriptors such as enthusiasm, competence, accountability, visibility and professionalism were frequently used. Other respondents described their cultural policy administration as solid, committed to the cause of public arts support and in contact with the civil society. At a more operational level, the respondents noted a strong emphasis on funding, policies, programs, organisational structures and committed professionals.

Respondents from national government agencies in most countries underlined the existing political commitment to public support for the arts and culture. The contribution of artists and civil society actors to policies and grant decision-making was also frequently noted. The contact and cooperation with the arts community was considered an important feature together with cooperation with civil society actors. The state institutions were valued for their long history and stable position, and for their established and well-functioning funding structures and procedures. The opportunities for the growing sector and the commitment of public institutions in supporting this growth were mentioned by respondents from the African agencies, Barbados and Singapore. The strong arms-length tradition was praised particularly by respondents from Northern Europe and New Zealand. Diversity of actors was mentioned in the responses from Singapore and New Zealand. Respondents in Sweden and Scotland noted the maintenance of the arts budget despite the economic crisis.

Respondents from regional and sub-national agencies were naturally influenced by their sub-national or regional perspectives. Respondents from large countries emphasised the vast differences within the countries; and regional respondents emphasised the difference between the policies adopted by different countries. The strengths mentioned by these agencies were mainly related to the professionalism of the sector, creativity of programs and recognition of the arts in the society. One respondent commented that due to outdated and unprofessional public administration, there are no strengths.

Even if critical at times about the overall system, the independent policy experts (including the category 'other') praised the professionalism, dedication and commitment of arts administrators. Arts administrators were described as being able to create large projects with limited resources and in some countries 'a handful of' committed individuals form the bedrock and backbone of the entire sector. Public arts agencies were acknowledged for their policies, strong funding support (when possible) and seen as facilitators of national arts events and international promotion, promoters of national excellence and giving a voice to the arts. Some respondents valued the peer review system and often artist-led councils or boards where stakeholders represent different disciplines and can influence policy and strategy.

The respondents noted the strong institutional structure, cultural infrastructures, long experience of arts administrations and the legal framework that seem to be decisive features of contemporary cultural policies and making culture a '*recognised part of the general administration*'. The administration was also acknowledged for the difficult task of combining traditional culture and contemporary arts and for the value of recognizing investment in culture

as a 'common good'. The acknowledgment of the arts administration in protecting cultural heritage was especially strong in Latin America.

In several countries the public arts administration is concentrated on government institutions/organisations which result in strong support for the arts by the government but the respondents also underlined the importance of independence of the sector where possible. Respondents from countries with the tradition of arm's length administration acknowledged the absence of direct governmental interference as an overall positive feature. Decentralization of public administration in some countries was considered a strength and international/regional cooperation (and international support) was frequently mentioned as a necessary task of the administration.

Public arts administration is seen not only as the playing field of state agencies but the presence of many stakeholders is considered an indicator of interest in the arts and its diversity at regional, local and municipal level. In some countries the public administration is the only provider of employment and professional development opportunities for arts students. All these actors were acknowledged for their role in fostering accessibility of culture and the arts to the general public.

Public Arts Administration – Weaknesses

Respondents from national government agencies lamented the situation in which public administration for the arts is obliged to compete for resources and recognition with other sectors. The main weaknesses of public arts administration include a strong reliance on government funding and the complexity and fragmentation of the funding system. The funding systems are expected to cover a large number of institutions and cultural operators, which then lead to problems such as the underdevelopment of certain sectors, and the favouring of established institutions and infrastructures. Lack of adequate training and qualified staff is problematic especially in newer agencies that also call for stronger cultural policies as a basis for action. European agencies referred to the constant need for economic justification and argumentation for public arts funding and African agencies referred to the lack of cultural policies. Respondents were also concerned about the possibilities of adequate funding reaching the whole population, and in larger countries like Canada the difficulty reaching dispersed population and long distances were identified as a weakness. Respondents also lamented that the *'historical funding patterns cannot keep pace with the growth of the sector'*.

Respondents from sub-national and regional agencies criticised the public arts administration for concentrating on urban areas and for the lack of consistent and long-term policies, strategies and funding. According to respondents, in some countries there is a lack of adequate institutional structures and in others administration and policies fail to reflect realities of the multicultural society. In some cases, new structures were identified as uncertain and therefore weak. The respondents also identified operational weaknesses such as a minimal development of legislation related to sponsorship.

According to the independent cultural policy experts (including the category 'other'), low levels or lack of adequate funding was one of the main weaknesses of the public arts administration

and as was the numerous inequities in funding structures. When public funding for the arts remains low it makes the sector especially vulnerable to economic uncertainty and turbulence. According to respondents, this has a long-standing effect on the sector itself and on the quality of artistic creation, working conditions and the development of the sector.

Even if the respondents value arts administrators, they were also critical of the deficit in trained staff and professional training. The stability of employment was considered very insecure at 'lower levels' of the administration and too settled at the higher levels. Young arts administrators seem to have more difficulties in establishing themselves in the administrative structure due to unstable contracting practices. There seems to be a notable 'brain drain' of talented professionals that find better remuneration and professional acknowledgment in non-cultural sectors. As for the higher-level officials they were often seen as getting too comfortable in their positions in order to take risks or adopt innovative policy actions. Transparency of selection processes and appointments seem to be problematic. One respondent noted that the: *'disappointment over the appointment of political senior managers or directors for positions they often are not qualified for'* and another respondent states that *'when top officials are political appointments this affects the quality of work and the interest given to arts policies but also brings in succession problems'*.

Public arts administration is also seen as excessively bureaucratic, inefficient, with slow administrative cycles and closed to new players. The respondents were particularly critical of the lack of clear leadership and profound understanding of cultural development or sector dynamics, and for the lack of cooperation with other national or international stakeholders. A long-term inability to engage in the creative economy agenda and the strategic potential of subsidised arts forms in this context was mentioned frequently by respondents. The administration was also seen to focus more on funding than on other types of support (research studies, cultural facilities, marketing assistance) and more on 'high arts' than on popular forms of culture. The evaluation methods of the public arts administration system were found to be insufficient.

The respondents reported a lack of consistency and continuity when political priorities change, resulting in an absence of clarity and cohesiveness. Some of the respondents also experienced a lack of political support when art does not form part of the political priorities or there is no visible connection or relevance to other sectors.

The sector is seen to be vulnerable to economic determinism when art and culture are not valued in political terms, and access to culture is not considered a basic right. Political trends affect every field of the arts – the sector is seen to have to conform to the pressures of new government agendas and in some countries the pressure has eroded the arm's length relationship with cultural agencies.

The respondents feel there is a lack of recognition of the economic or social impact of the cultural sector and a weak connection with other policy areas. They also find that conservative working models that favour dominant cultural forms tend to persist and leave less space for experimental programs and priorities. The respondents called for more attention to operational matters such as satellite accounts, creative industries (especially in Latin America and Africa),

legal frameworks (that currently relate more to corporate sponsorship interests), statistics and to place less attention on entertainment shows, unsustainable large infrastructure projects and mainstream art production.

Some respondents defined their cultural environment as excessively centralized or extremely decentralized. A centralised system may bring lead to one-sided policy design and a lack of effective mechanisms for the inclusion of all stakeholders in public policy. In a decentralized system the number of actors leads easily to fragmentation and difficulty in setting an agenda – and disengagement from political realities.

Some of the respondents painted a picture of an oppressive cultural environment where freedom of expression and artistic freedom remain at risk and a system is filled with corruption, lack of transparency and the exploitation of artists and cultural operators. They report no autonomous public art administration. One of the respondents expressed: *‘Experimental creative non-conformist civil initiative, aimed at social and cultural contradictory topics are being oppressed’*.

But other respondents reflected a different reality as described by one respondent; *‘too little discussion about artistic quality and too much emphasis on social dimensions in relation to funding schemes. The result is an influx of social arts project or projects aimed at specific demographic segments to the detriment of quality.’*

Public Arts Administration – Opportunities

An opportunity frequently mentioned by respondents was that many national government agencies have recently undergone structural reforms. New funding structures are considered to help increase the freedom to experiment with new programs and to support innovative art forms, and to create connections with more traditional sectors not previously included in their remit (e.g. film, heritage, museums, libraries).

Increased higher education and training opportunities in the arts, not only for artists but also for arts administrators, was strongly welcomed by respondents in many countries. Agencies across the globe have experienced significant growth in the arts sector (including the emergence of new forms of practice) and if political will is on their side e.g. in the form of implementing strong national cultural policies, this is considered highly beneficial.

A vibrant arts sector and the involvement of artists and arts practitioners in the development and implementation of arts policy seem to be important features for national agencies. The arts were also described as resilient and *‘not to be disadvantaged by the public funding pressures’* (for example in Wales, the Netherlands, Botswana). The respondent from El Salvador also noted the social role of the arts administration in combating violence.

At the operational level, the application of new technologies represented a great opportunity for arts administrations around the globe. In more established agencies electronic grant application systems seem to eliminate administrative barriers and reduce bureaucracy and in many agencies offer opportunities for access to the arts for a greater proportion of the public.

Surprisingly, national and international partnerships were not included in the main opportunities listed by respondents from national agencies except in Canada, Finland, Niger, Scotland and England. Local cultural policies were mentioned as opportunities by respondents from New Zealand, Finland, Sweden, Barbados, England and Tunisia.

Respondents from sub-national and regional agencies acknowledged the importance of partnership from a regional perspective as well as cooperation with diverse operators. They also referred to the promotion of the arts to different stakeholders and a greater role of cultural diplomacy in investment and trade. One respondent acknowledged the '*interinstitutional solidarity*' due to economic crisis and lack of economic resources. Digitalisation was also noted especially in the form of enhanced access to collections online.

For independent policy experts (including 'others') engagement of new audiences, especially young people offer fresh opportunities (particularly in countries with a large youth population). New social media-heavy audiences are linked with the use of new technologies and digitalisation and considered to be '*more inclined to try new things*'. New technologies and digitalisation are also providing opportunities for different stakeholders in the cultural sector as the skills, experience and creativity of cultural operators can provide content direct to their audience via digital platforms. New audiences are forcing the sector to become more efficient, innovative and creative in their approach, and are proving to be a catalyst for ideas and creating new concepts and emerging art forms. More aggressive engagement with the digital online environment for creators, makers, promotion, sales and consumers is providing many untapped opportunities. Respondents also called for action to maximize economic development opportunities by enhancing creative industries and cultural management programs.

With new audiences there is also an emergence of new operators – local administrations, cities, communities – as major players in the cultural sector. Arts investment by city governments is mainly related to urban renewal (referred to as '*creative placemaking*'). One respondent notes: '*Cities and communities are doing some very creative thinking and programming in arts and cultural administration. For example, they are trying to increase accessibility, promote sustainability, and deliver more services using digital technologies.*'

Maintaining and increasing the level of civil society participation in the discussion and in cultural policy formulation represents a major task and opportunity to the public arts administration. Respondents underlined the opportunity represented by the diversity of products, audiences and arts forms including the sense of representation and accessibility of and to Indigenous artists. The opportunities of arts education seemed very predominant across the globe. From a regional perspective, the role of art in social cohesion in Latin America represents a strong opportunity for the region, as does the development of cultural tourism in Africa.

Respondents praised the global opportunities to connect, share ideas and partner with other countries to work on creating a stronger role for the arts in '*contributing within the public education system and through community arts organizations to a more socially just and inclusive society*'. Transnational partnerships, partnerships with other agencies and with the private sector as well as strong organizational infrastructure are leading to a willingness for inter-organisational collaboration – also with other disciplines and sectors – and increased

international competence (including foreign investment in countries with fewer resources). Respondents also noted the opportunities to collaborate with collectives, cultural associations and independent artists in the promotion of the arts and protection of cultural heritage (especially in Latin America), academic institutions and private institutions.

At the operational level, African and Latin American respondents particularly acknowledged the application of the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005). Respondents also mentioned other international instruments such as free trade treaties, international agreements and cooperation with international organisations as opportunities and the role of media was also underlined.

Even if the economic crisis is mentioned as one of the main threats to the survival of the public arts administration, there seems to be a consensus that the new opportunities created by the situation has had a positive effect in requiring the development of new models. One respondent stated that: '*The crisis can be a window for opportunities to rethink the objectives and instruments of public policies.*' Finally, there seems to be a strong belief in the sector's ability to develop a public voice on behalf of the arts.

Public Arts Administration – Threats

As expected, budget pressures predominated as one of the main threats experienced by respondents from national arts agencies. Many of the agencies foresee further tightening of funding in the future due to reducing public budget and business sponsorship. Respondents agreed that reduced investment threatens the development of talent and services and limits the accessibility of the public to the arts.

Respondents from national agencies noted the reduced number of qualified staff as a threat. As well, qualified staff rotate from one administrative office to another and valuable knowledge is lost in the process. In countries such as Malawi and Niger there is a lack of proper training both for artists and arts administrators in managerial and entrepreneurial skills, and in Barbados the lack of business skills is a threat to advancing the vision of organisations.

Respondents noted the '*conservative priorities*' and lack of adequate policy frameworks can lead easily to excessive bureaucracy and constrained fiscal environment. Some of the main threats seem to be the political ideologies that do not have the needs of artists at their heart.

Overall, respondents from the state agencies reported as a threat the marginalisation and lack of recognition for the arts in governmental policies. This leads to a need for '*continued justification*' of public funding of the arts, accountability requirements and excessive measuring of the impact of public investment in the arts.

Respondents from sub-national and regional agencies also referred to the economic and political instability as threats. Respondents mentioned scenarios where government is not committed to public arts using as an argument, that the arts need not to be administrated or publicly funded. Political corruption is a great worry in a sector that '*speaks on behalf of social sensibilities*'. Some respondents fear that current political and severe economic pressures will result in a situation where the cultural and artistic panorama might be difficult to reconstruct. The

lack of proper funding results in *'a frenetic system of people working when they have funds and not when the money runs out.'*

The independent cultural policy experts (including the category 'other') mention that further funding cuts and economic crisis represent a real threat to projects, programs, infrastructures, institutional stability, creativity and development of talent. There is a great concern about the increasingly challenging economic and political environment combined with a lack of strategic vision in leadership. Respondents were concerned about political ideologies that consider art and culture as a 'market tool' more than a social or democratic strength that can promote diversity, cohesion, citizenship and cultural sustainability.

Respondents expressed concern about a situation where the funding might only come from the private sector, which leads to problems of accessibility to the arts outside big cities and to the reinforcement of solely commercial activities. They are also concerned about the public's inability to understand the benefits of arts support. Respondents reported that the loss of public interest in public arts administration may favour local and private initiatives but at the same time there is a clear disengagement of local and regional authorities from cultural activities that are not compulsory. This leads to a scenario where arts and culture become the domain of a select group of arts administrators and *'not a matter to be discussed along with public welfare, well-being, educational success and thriving economies'*.

For some, one of the biggest threats was simply the government and its policies. Some of the respondents referred to upcoming elections and their impact on the continuity of programs and funding and changing priorities especially if *'policies come in narrow form'*. Other government policy downfalls were the instrumentalisation of culture, the lack of protection and preservation and the enormous dependence of the cultural sector on public funding.

As expected, arts education was a great concern of many respondents. According to respondents, the eradication of arts education in schools leads to the reduction of public and political importance attached to the arts, and reduction of international competence in cultural and creative industries.

Some respondents noted *'nothing changes'* as a threat. But as an overlying positive note one respondent stated: *'the arts will always survive'*.

Public Arts Administration – Challenges

Respondents listed a variety of challenges that they consider important for public arts administration and policy making. One of the most common themes was cultural diversity and how to engage and deal with it at a much deeper level. Several respondents referred to the difficult task of representation in policy-making and how to make sure that the public administration of arts funding represents and includes everyone. This was particularly important in countries with significant Indigenous or immigrant populations.

Another predominant theme was finding a robust way to collaborate and network with different stakeholders from academia to non-governmental organisations, and to find ways to connect with the private sector.

Many respondents in all groups referred to the low share of culture in the general budget. Most respondents reported the overall financial deficit of the sector. However, there were some positive exceptions including a reply from Norway: *The government aim that 1% of the national budget should be allocated to culture (currently 0.97%).*

Respondents commented on their regional priorities and a desire to find ways to connect with audiences throughout their own regions. The importance of the language and common cultural history was mentioned by many Latin American respondents. Eastern and Central European respondents referred commonly to the EU membership (existing or future) and its impact in international cooperation and artistic exchange. Cultural tourism seems to be of particular importance in Africa. Across the globe respondents underlined the opportunities of creative industries and the needs of the sector to respond to the changing society and its well-being.

There was general concern about the risk of connecting cultural policies with nationalism and the protection of cultural identity. According to respondents, these struggles do not always guarantee respect for diversity and the *'hybrid nature of cultures'*.

PART 2: CULTURAL SECTOR

The second part of this report describes the views of respondents about the cultural sector in their country.

Overview of main themes

The following tables summarise the main findings by organisational type of respondent

National government agencies

Strengths	Weaknesses
Diversity and vibrancy Institutions and infrastructures Professionalism and artistic excellence	Economic instability and limited resources Uneven cultural provision Competition for existing funds
Opportunities	Threats
Arts development and new funding models New technologies International cooperation and networking	Cuts in public funding Lack of policy orientation Emphasis on economic measurements

Sub-national and regional

Strengths	Weaknesses
Diversity and vibrancy Professionalism and artistic excellence Networking and collaboration	Distances and isolation Lack of self-definition and orientation Lack of funding
Opportunities	Threats
Related to specific cultural environment Advocacy	Lack of political support and commitment Other (political) priorities

Independent cultural policy expert or other

Strengths	Weaknesses
Resilience Diversity Vibrancy and creativity High level arts education	Dependence on public funding Fragmentation and disorganization Marginalized position in policy-making Instrumentalisation of culture for other policy priorities
Opportunities	Threats
Partnerships, collaboration and networking Internationalism Audience development Diversity	Economic insecurity Privatisation Globalisation 'Brain drain' in the arts

Cultural sector – Strengths

Respondents from the national agencies seem to be proud of the vibrant, diverse and strong cultural sector in their countries. The cultural sector is seen as highly motivated, enthusiastic, innovative and professional. Respondents from sub-national and regional agencies agreed with this description.

Countries with a long institutional history recognize the role of cultural institutions and the diverse offering of cultural productions and services. Countries such as Canada, Finland and Sweden focus on the accessibility of the arts to the public through solid and well-organized sectors. The development of legal instruments is acknowledged as important in countries such as Barbados and connecting the diaspora populations with national culture in El Salvador.

Another strength identified is that funding sources have broadened and that has provided more opportunities for employment and raised the visibility of the arts and culture sector.

For respondents in subnational and regional agencies, the vibrancy of the sector, as well as cross-border cooperation seem to be priorities, as is networking with national and international arts centres and galleries. Some respondents acknowledged the internationally recognized cultural institutions in their regions as strengths.

Independent cultural policy experts (including the category 'other') also praised highly the vibrant arts scene where *'creativity and talent are abundant'* and there is a high degree of originality and self-driven and passionate professionals.

Respondents see the cultural sector as resilient (*'roll with punches'*) and praise the sector's ability to take advantage of new opportunities (such as partnerships with the private sector and collaboration with the local level) and to survive hardships varying from economic challenges to cultural colonization. It was seen as a strength, the ability to be ground breaking and innovative with little or no resources, with economic uncertainty and sometimes without institutional support. Hardworking professionals are seen as *'devoted practioners who continue even when ignored, marginalized and actively crushed'*.

Many respondents acknowledged the rich cultural traditions of their countries on which have been built strong contemporary practice, and the awareness of the public of that history. The importance of cultural heritage is especially strong in Latin America and Africa. European and Asia/Pacific respondents put emphasis on the existing infrastructure, large and important network of cultural institutions and institutional development.

High-level arts education is seen to benefit artists, performers and the audience in general. Diversity in its different forms in terms of expression, cultural activities, products, services, funding and investment models is a great strength of the system as is the variety of cultural forms from traditional to contemporary. As one respondent states: *'It's complex but rich'*.

The arts were praised for their democratising effect and access and participation in cultural services was seen as an important civic activity.

Respondents also mentioned arts disciplines that are particularly strong in their country such as performance, music and carnival arts in Africa, Indigenous art forms in Australia and the Pacific, several disciplines in Europe (design, creative industries).

Cultural sector – Weaknesses

Economic instability and limited resources are the main weakness of the cultural sector according to respondents from national arts agencies. There seems to be increased competition for limited sources (including public funding, private sponsorship, philanthropy), which leads to a lack of funding in certain domains. The agencies also report uneven cultural provision and infrastructures especially in rural and remote areas, minority and Indigenous communities, and the difficulties in reaching unengaged publics.

Respondents underlined some country-specific themes such as medium level of copyright protection, lack of sufficient public profile of the sector, the sector not seriously considered as an economic sector and fragmentation and disorganisation

Some countries are particularly concerned about a concentration of public funding in one main source (e.g. lottery in England and Finland) while others report the absence of new funding mechanisms (Tunisia, Slovenia) or severe lack of funding in general (most agencies in Africa).

The respondents from sub-national and regional agencies offer very different responses that are linked to the direct threats to their immediate cultural environment. They describe a sector that is suffering from a lack of organization, leadership and vision. They also see a sector in need of self-criticism and an isolated sector of '*ideological resistance*'. The arts sector is presented as a sector that has internal conflicts, does not always know what it wants and has no direction. Respondents also denounced the lack of geographical balance in accessibility of the arts and disengagement of young people from traditional art forms.

The independent cultural policy experts (including the category 'other') stated that inadequate funding is one of the main weaknesses of the overall cultural sector in their countries. The sector is quite capital intensive to run and very dependent on public funding. Some respondents report a weak private sector investment, which reduces the diversity and variety of funding. Others refer to the situation in which funding agencies insert their agendas into arts processes that leads to poor quality and inadequate productions. Several respondents mention the situation in which emphasis is put on big cultural corporations instead of small creators or producers and where major financial resources are going to a limited range of elite arts activity in urban centres.

The respondents describe the cultural sector as fragmented and disorganized which leads to a situation where there is no united voice or global vision. Some respondents criticise the cultural sector for thinking that it can '*do it alone*' and that there is no need for working with potential allies. The cultural sector often sees other sectors as threats and are not willing to engage in a constructive dialogue. There is also a visible gap between well-established institutions and artists with emerging initiatives.

Respondents noted that some art sectors are more vulnerable than others and there is a difference between sectors that have an industry arm and those that do not. They also worry about the low levels of cultural consumption and the public not valuing the effort or economic cost of cultural production.

Some respondents think that the opportunities offered by the richness and diversity of the culture within the country stay untapped and that the society is not feeling reflected in the arts. In the same way, some respondents report cultural insensitivity of the general public. It was also noted that there is a danger of instrumentalisation of culture for tourism or other purposes (e.g. economic boosting) rather than *'for the purposes of valuing, promoting and sustaining cultural traditions and practices to enrich the social fabric within a robust democracy.'*

Some respondents experience cultural barriers to international cooperation. The common language in Latin America is considered a great strength yet the common inability to speak English limits the possibility for real internationalism. Other respondents acknowledge the insufficient support of legal frameworks to aid creativity and private sponsorship and the lack of adequate arts research, documentation, catalogues, statistics and indicators.

Arts education was frequently mentioned as a weakness. Respondents mention the absence of innovative and educational programs in public institutions and the inconsistency of quality arts education in schools. One respondent states that the arts education is *'often serving privileged students more than students from low-economic incomes. As a result, exacerbated wealth disparity decreases opportunity for cultural and arts education to significant number of students.'*

As with other respondents, the individual cultural policy experts expressed a need for the sector to be much more open to self-criticism. The sector is seen as complacent, self-satisfied, corrupt (tribalism, nepotism, support of those of political value), inward-looking, ideologically driven, lacking criticism and reflection and with an over-production of potential contributors and not enough jobs for them to fill. Because other non-cultural sectors are so often considered by cultural operators as threats that compete for same limited resources, they often find themselves excluded from *'the table when development initiatives are rewarded.'*

Cultural sector – Opportunities

Respondents from national arts agencies have confidence in the development of the sector and arts disciplines. They praise the resilience of the sector in times of economic hardship through the creation of new business models and new funding forms. The new generation of artists is making use of new technologies and the opportunities for connecting with wider audiences through the digital environment.

Many respondents underlined the importance of international and national cooperation and networking in terms of creation but also in terms of empowering arts organisations and providing them with wider opportunities and lower production costs. Reaching out for new audiences and acknowledging diversity seem to be important. The social impact of the arts was mentioned by respondents from Canada and Malawi, the recognition of culture as part of development in Tunisia, Malawi and Barbados, and the role of art in building democratic values and citizenship in Tunisia.

Respondents from sub national and regional agencies again focused on region-based opportunities: technology for managing isolation and distances, partnerships and business sponsorship for funding, sector development and growth, advocacy, the role of cities, emerging artists and diversity.

Independent cultural policy experts (including category 'other') see partnerships, collaboration, and networking as environments with great opportunities for the cultural sector to promote local knowledge with support from foreign ideas and knowledge. This also includes increasing interest from foreign bodies, access to know-how, and collaboration with stakeholders across the world in developing new skills for cultural professionals and meeting demands from the global audience. Respondents from Africa underlined the importance of international south-south market and bilateral cooperation.

Audience development represents an opportunity for the development of the sector and is seen as a top priority for future action.

Creative industries and new arts business models get specific attention from respondents underlining that the sector would benefit from new forms of economic incentives and new investments, and bringing together cultural and creative industries in a managed model that creates business opportunities for producers and for the public. As one respondent notes: *'engaging digital value chain at every stage from creation through production and reproduction, to promotion and marketing, distribution, sales, and audience/market development. Export potential in a global market'*.

Latin American and African respondents highlighted that their cultural and industrial heritage could become an important asset if can be preserved and turned into a support mechanism for arts and culture.

Despite many threats to the sector, there is an underlining optimism for its future. As one respondent states: *'the main opportunities are the energy and enthusiasm from the workers. Its people, artists, community and society.'*

Cultural sector – Threats

The respondents from national arts agencies see the dependence on public support, cuts in the public budget and limited interest of the private sector as major threats to employment and overall cultural sector programs. They note that financial hardship brings pressures to everyone but especially to cultural expressions by minority and Indigenous societies. The public and the private sector seem to be in continuous need of being reassured of the benefits of the arts and requiring economic measures of success. Respondents also emphasised as threats the lack of policy orientation and priorities, and of new initiatives.

The respondents report competition from international markets and especially in Africa and Barbados *'apathy towards local content and products in favour of international content and products'*. The African respondents also find 'westernisation' as a great concern for local cultural forms.

Respondents from subnational and regional agencies painted very diverse pictures of current threats. These included the lack of policy commitment, dependence on central government, population growth in some countries and aging population in others, competition from other forms of entertainment and leisure, and financial and environmental sustainability.

Independent cultural policy experts (including the category 'other') identified economic instability and low and unstable funding as main threats to the arts and cultural sector in their country. Some respondents feel that the current financial position of the arts could mean a great loss of cultural work for a considerable time in the future. Some respondents report that many arts organisations will disappear or are on the verge of disappearance. In the same way, many independent artists will be unable to practice and activities will cease as there is no access to institutions.

Respondents noted as threats the slowness of big systems and inadequate support for small organisations working in the culture sector as well as lack of general awareness of cultural sector and general economic climate. The understanding of culture by the administration can be problematic when the dominating ideology does not give space for cultural forms that do not fit that ideology.

The respondents expressed concern that culture and education are being privatised in some countries meaning that cultural activities will remain in the hands and enjoyment of a lucky few. Isolated people, youth and the underemployed have less opportunity to express themselves.

As in other respondent groups, for the independent policy experts globalisation constitutes a '*deficit*' for the preservation of cultural heritage and national identities. Respondents especially in Latin America and Africa note the '*homogenizing and commodifying of the national culture based on the 'market-based' notion of popular culture*'.

The respondents seem to agree that a strong brain drain represents a threat to the survival of the cultural sector. In many countries artists leave the country due to lack of opportunities and funding or leave the sector and look for opportunities in better (paid) sectors.

Cultural sector – Challenges

Many respondents describe how physical access to cultural services and participation is a great challenge in their countries. This underlines the need to build a comprehensive transport system or design better accessibility policies. Transport and its various challenges, from long travelling times to lack of late night transport systems, was mentioned in various responses around the globe

The regional differences are most visible in the funding levels. One respondent from Africa states: '*the biggest challenge in Africa is fundraising for the arts and culture programmes. There is need to come up with initiatives that strive at promoting the indigenous arts and culture without attaching some conditionalities that negatively affect the cultural practices they intend to uplift.*'

In industrialized countries the aging of the population was perceived variously as an opportunity, a challenge and a threat.

The role of the arts in society prompted many comments from respondents. The presence, or lack of, rights inspired many reflections from respondents. One respondent states: *'Cultural policies require every time more perspective, vision and governance in order to guarantee fundamental rights'* while another reports a situation in her country in which: *'Civil society has to constantly fight for their rights but mostly as a watchdog for preventing illegal and non popular measures. Artists should create not constantly follow legal amendments or protest in the streets'*.

Some respondents from non Anglo-European countries lament the focus on those cultural areas instead of their own region and in mainstream cultural expressions instead of Indigenous ones.

There is an underlying understanding of the importance of the arts to the building of the society but a difficulty in giving evidence-based information. One respondent states: *'How to demonstrate the social and personal benefits of continuous investment in the arts' – requires benchmarking, placing intrinsic benefits of the arts and culture alongside economic benefits.'*

One of the biggest challenges for the cultural sector everywhere is to how to maintain public interest and support. As one respondent states: *'Very important that we engage and energise the public as advocates. We need to do more to make the connections in the public's mind between the night out or event that they enjoy, and the public investment that's needed to sustain it. Too often, the public is not making the connection and realizing the danger of losing these activities. People only seem to value things when they are removed or threatened. It's too late then.'*

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