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Understanding, Capturing and Fostering the Societal Value of Culture

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Introduction

The present deliverable concludes the work carried out under WP3 on "measuring and imagining the plurality of values of culture", together with D3.11 on the discussions held at the central UNCHARTED event in London (12-13 January, 2023).

The aims of this document are to:
- provide a systematic analysis of the nature of evaluative regimes analysed in D3.6-3.7;
- highlight the tensions observed within each evaluation regime and the approaches to tension resolution;
- discuss the connections between evaluation regimes;
- complement the analysis of evaluation regimes with broader reflections on participation and the influence of neo-liberalism in public administration;
- discuss how WP3 findings complement the work done under WP1 and 2 (looking backward);
- highlight connections between WP3 and WP4 and 5 (looking forward).

The aforementioned aims are achieved drawing on evidence collected through the 18 cases carried out in WP3.

To help the reader positioning WP3 activities in the UNCHARTED project, Appendix 1 retraces the themes investigated in WP1, and the case studies analysed in WP2 and 3. In addition, a glossary of the terminology employed in the UNCHARTED project is included in Appendix 2.

1. Outline of the nature and connections regimes of evaluation

In this section, we review the features of the evaluative regimes analysed in D3.6-D3.9 (i.e. grammars, technologies, methodologies, and systems) in terms of the evaluative tools used by social actors in different fields, the tensions emerging, and their forms of resolution. Next, we discuss the elements leading to the hybridization of evaluative regimes.

1.1 Exploring regimes of evaluation: tools, tensions, and resolutions

1.1.1 Evaluative tools by evaluative regimes

The actors and organisations analysed in the WP3 case studies implement different tools in their evaluations, namely qualifications, professional criteria, evaluation guides, quantitative, and qualitative indicators. The evaluative instruments employed vary according to the actors and organisations involved in the different evaluation regimes analysed (see figure 1).

Figure 1: Actors, forms of evaluations and evaluation tools
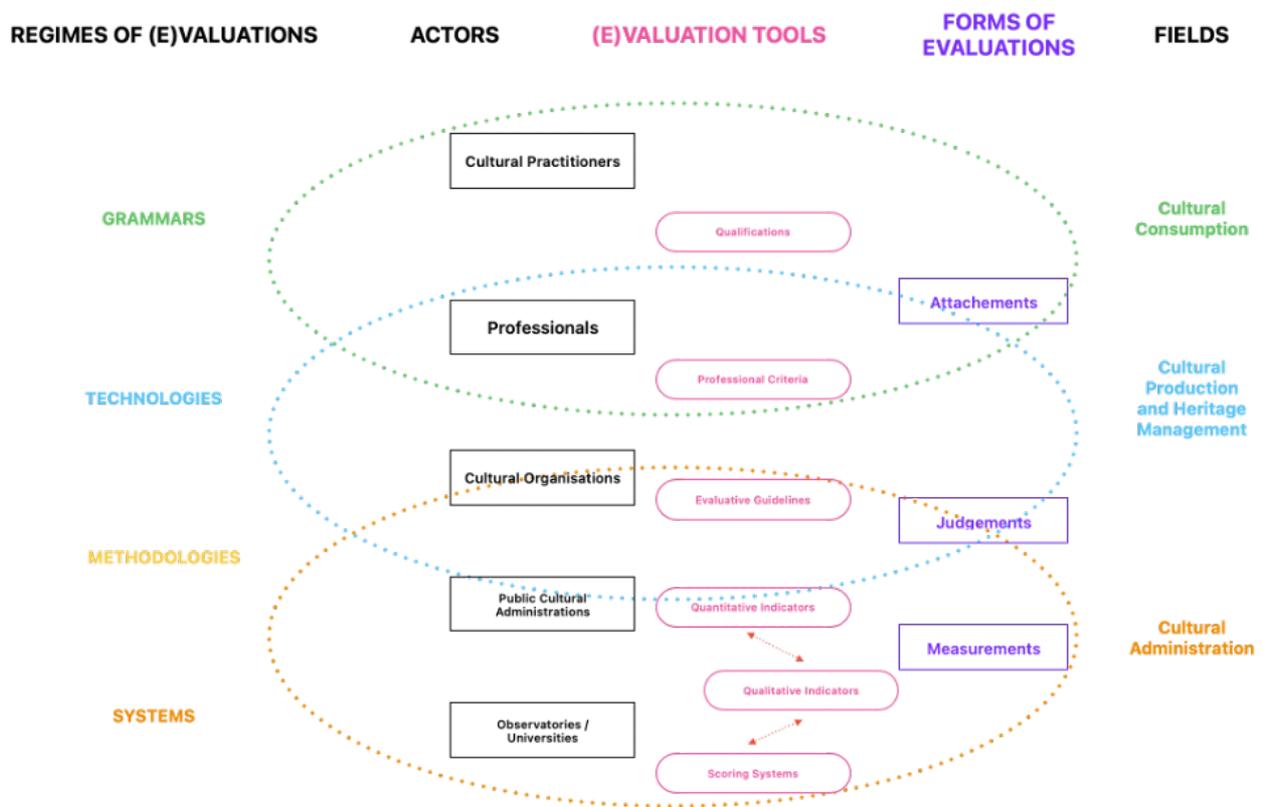
Source: Own elaboration

The cultural consumers-practitioners analysed– i.e. music listeners, non-professional dancers, artisans, jazz music amateurs - use **qualifications** to assess artistic expressions and cultural practices. In these situations, cultural practitioners do not validate their assessments beyond their peer group. Therefore, their qualifications are based on implicit individual judgements, feelings, emotions, and appreciation. Following Heinich (2020a), these evaluative practices can be considered **attachments** based on gestures and attitudes (emotions). They are implicit, manifested indirectly through behaviours or narratives. They organize as **grammars** that allow for a multiplicity of valuations, which combine value principles in different ways.

Evaluation tools diversify as more actors and organisations are involved in evaluation processes. We observed this situation in the evaluative practices implemented in the projects, programmes and policies analysed in the field of **cultural production and heritage management**. Architects and designers involved in the cultural projects studied in the city of Barcelona use **professional criteria** to assess the development of their projects. These criteria are based on intersubjective (dis)agreements between professionals (architects, acoustic consultants, construction companies, designers, producers, accountants, etc.).

In case studies involving participatory initiatives like RRR in UK (focus on yonger generations), and Mudec in Italy (focus on migrants), evaluations do not involve only professionals (external experts and evaluators), but also public administrations at different levels (Municipality of Milan, National Lottery Heritage Found), and associations (Forum Città Mondo). In these cases, we observe that evaluation tools are based on professional criteria centred on **subjective judgements**, and **meta-evaluations** carried out by the different groups involved in MUDEC, and on various **surveys** developed by RENASI, in charge of evaluating the RRR project (participant survey, project team survey, youth engagement in heritage survey, etc.) within the broater Kick the Dust programme (KtD). Here we observe that evaluation tools become more specialised as an external actor (RENASI) appears, and when more funds are involved in developing the programme (KtD).

The plurality of actors and organisations becomes even more significant in the evaluative practices related to the preservation of Venice and its lagoon and the Liverpool Maritime Mercantile City. Both cases involve entities and administrations of different scales, such as UNESCO and its various political and technical bodies (international level); the Italian Ministry of Culture and Heritage and the UK government (national level); and the city councils of Venice and Liverpool and civil society (local level). Evaluation tools implemented here are centred on **evaluation guidelines,** where values such as authenticity, integrity and universal value are operationalised and encoded, as well as on reports, laws and formal decisions where values are enacted. The different scales of action, the complexity of organisations and institutions involved, and their administrative bodies lead to higher precision and formality in the evaluation tools implemented, at least on paper.

Cases studies in the field of cultural production and heritage management are characterised by a form of evaluation based on **judgements**: mechanism of value attribution by a subject to an object. The focus is on the speech acts in which they are manifested (Heinich, 2020a). These judgements are key elements in expressing tensions in decision-making within cultural production and management processes. For this reason, we define the evaluation regime based on them as **technologies** of evaluation (Lamont, 2012). This regime includes judgement devices of different kinds, such as professional judgement or evaluation guides being more or less explicit or implicit, routinised or *ad hoc.*

The cases studies conducted in the field of **public administrations** explored the influence of cultural administration-led evaluations on urban regeneration (Fàbriques de la Creació and Matadorio programmes in Barcelona and Santiago de Compostela), cultural production (local grant making in Spain), and cultural mediation (the evaluation of state subsidised museums and educational projects for primary and secondary schools in Norway). In these cases, the actors involved are not restricted to cultural administrations, both local and national, and administrative bodies (Culture Institute of Barcelona, Santiago de Compostela City Council, Norway Arts Council). They also include other public and civil society organisations, experts and actors on which their evaluations impact: cultural organisations, cultural producers, local communities, museums, schools, etc.

Two distinct **evaluation methodologies** appear in these contexts. First, a **bureaucratic-led** methodology, in which public officials of the cultural administrations evaluate and assess the performance of cultural institutions involved in urban regeneration programmes (Barcelona and Santiago cases in Spain) or the achievement of specific goals by Norwegian state-subsidies museums. Second, an **experts-led** methodology in which cultural projects are evaluated by experts (as in the cases of public grant competition in Barcelona and Santiago in Spain). The dynamic of these two methodologies and their underlying legitimacy are different, they are in tension, but the line between experts and bureaucrats is thin because the same individuals often shift between those roles. In their evaluation practices, a double valence is detected in the type of evaluation tools implemented by both actors. Evaluative tools are based on **quantitative indicators** (to evaluate the performance of museums in Norway), a **scoring system** (to define which artistic projects should be subsidised in the city of Barcelona) or **evaluative protocols** (such as those implemented for the evaluation, selection and production of artistic projects for school pupils in Norway). These evaluations are complemented by evaluative tools based on informal and **ad-hoc interactions** and **qualitative indicators** (for the evaluation of Norwegian museums); **informal negotiations** (for the evaluation of cultural projects in Santiago) and **non-systematic feedbacks** (for culture-led urban regeneration programmes in Barcelona).

The twofold nature of evaluation tools (bureaucratic and expert led) is also detected in **cultural information systems**. On the one hand, cultural information systems rely on more formal and specific instruments based on **quantitative indicators,** like systematised in **index** (Cultural Index Norway) or **scoring systems** (such as the one implemented in the National Museum System in Italy). On the other hand, when actors managing cultural information systems interact with the object of evaluation (municipality or museums), the importance of less formal elements based on **qualitative indicators** increases. These forms of evaluation aim at achieving an in-depth and contextualised understanding of "data". The tension between these two evaluation logics, which in the analyses of cultural information systems we identify as **lumping** (data

management mechanisms produced by aggregation) and **chunking** (data management mechanisms based on segmentation), is key to understanding the nature of evaluative processes aimed to capture the evolution of cultural fields.

The forms of evaluation analysed in the cases of cultural administration and information systems have elements of judgement (detected in the cases of cultural production and heritage management) but also of **measurement**, as they require various instruments such as codes, or numbers to measure things. Both evaluation regimes are characterised by being the most explicit and formalised ones, linked to expert opinion and accountability (**methodologies**), but also to categorisations and commensuration procedures (**information systems**).

1.1.2 Tensions by regime of evaluation

Tensions provide privileged perspectives on valuation and evaluation dynamics in the cultural sphere because tensions trigger justifications and mobilise evaluation tools. Value tensions run through all the evaluation regimes studied, regardless of the type of evaluative tools implemented and the degree of complexity of the evaluative context.

We detected a plurality of emerging valuations in each evaluation regime studied, which can be distributed according to three main vectors: **Social, Cultural, and Economic Value Vectors**. Cultural valuations, and their different expressions, are in tension with social and economic valuations in different ways according to the different evaluation regimes. **Emotions, sensitivity, and expressiveness** define the core of cultural valuations in the evaluation regime of cultural consumption. This type of cultural valuation is in tension with social or extrinsic valuations of the aesthetic experience, like **identifications** (such as group identities), **sociability** (linked to the intensity of links and exchanges), **political identity** (related to a political connotation), and **well-being** (related to physical and mental pleasure, hedonism, and positive sensation). **Technical valuations** (which define the character of a cultural project) and **identity valuations** (associated with cultural heritage) define the specificity of cultural valuations in the evaluation regime of cultural production and heritage management. In contrast with the cases of cultural consumption, where economic tensions are implicit or external, cultural valuations in cultural production and heritage management are directly in tension with economic valuations (associated with **economic constraints** or **profit interest** of a cultural project or an instrumental or lucrative use of cultural heritage). Cultural valuations in the evaluation regime of cultural administrations are expressed in valuations linked to **artistic excellence,** based on assessing formal, technical characteristics or quality standards of a cultural project. The valuations of artistic excellence assumed by public cultural administrations in their evaluations and assessments enter into a double play of tension, both with social (expressed in **democratic** and **democratisation** values of a cultural policy) and economic valuations (expressed in the **instrumentalisation of culture** to achieve **economics goals**) (see figure 2).

Figure 2: Valuations and their tensions
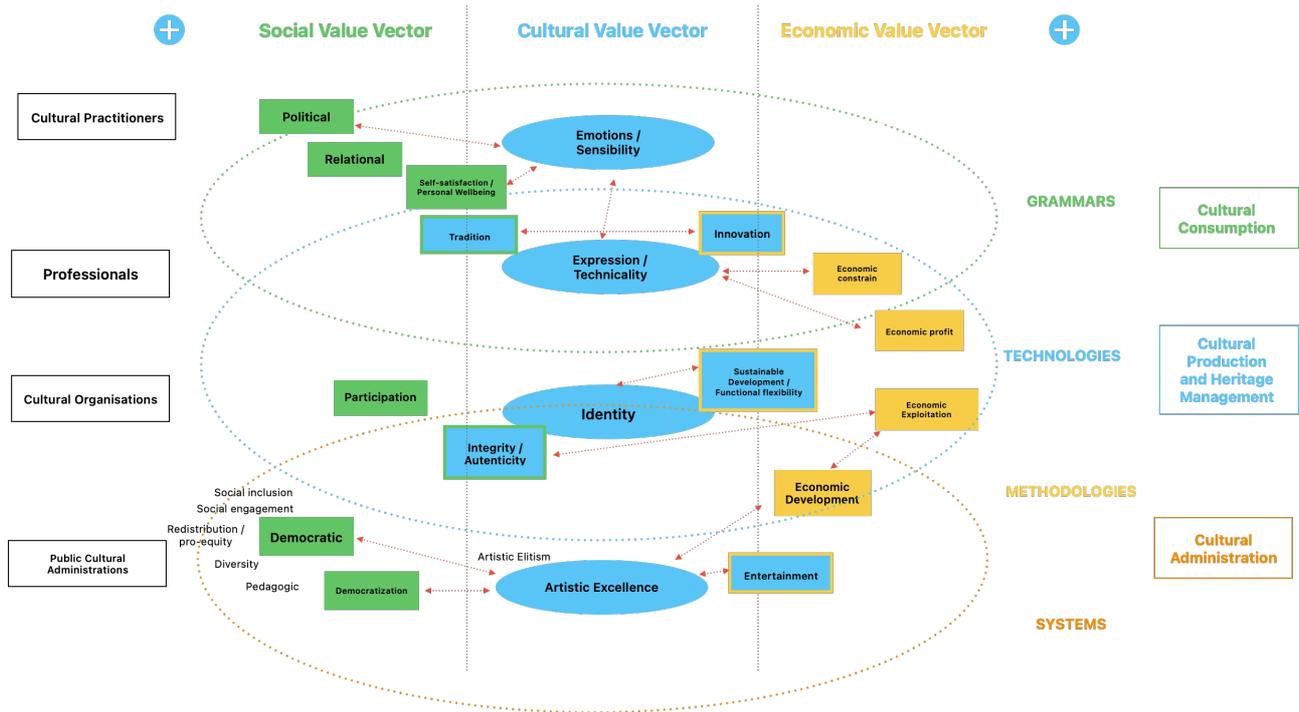
Source: Own elaboration

In our analysis, we have identified three ways in which value tensions (value oppositions and different interpretations of the same value) are expressed according to the evaluation regimes studied: *Variation in valuation*, *Axial tensions between actors* and *Evaluative tool tension* (see figure 3).

Figure 3: Tensions and resolutions
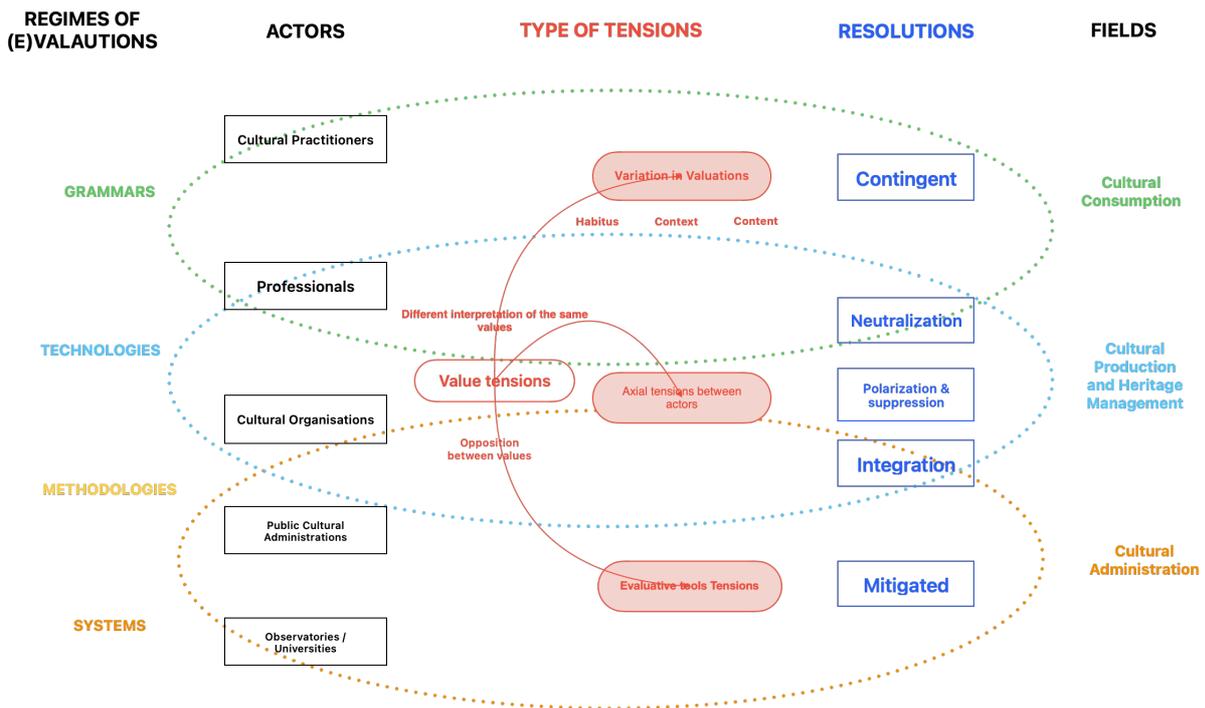
Source: Own elaboration

Variation in valuation

In the field of cultural consumption, the tension between cultural evaluations (sensory, emotional and expressive) and social evaluations (identity, political and relational) is latent and varies according to the **habitus** of the actors involved, the **context** in which the evaluations are made, and the **content** of the practices and objects evaluated.

Habitus, context and content affect the interpretations that cultural practitioners have of the same value. These interpretative variations become evident, for example, when the artisans (Loulé Criativo) and amateur musicians (Jazz ao Centro Clube) value their artistic expressions. In general, older artisans and musicians tend to preserve traditional forms of craftsmanship or play more traditional repertoires while younger ones search for contemporary or innovative repertoires. The same situation arises when music listeners value the aesthetic experience differently according to their habitus, the context where they listen, and the content of the songs, prioritizing either emotional and sensitive aspects or aspects linked to virtuosity, technicality, and complexity.

The low complexity of actors and organisations involved in evaluation processes in reception contexts makes value tensions latent and variable. The way tensions are solved is **contingent** on individual habitus, context and content.

Axial tensions between actors

In complex contexts like cultural production and heritage management, the emergence of tensions between opposing values, i.e. integrity vs economic development - or different interpretation of the same value - i.e. "economic value" – is trigged by the **diversity of actors** involved in distinct temporal stages of the evaluative process.

In the case studies analysed, we observed moments where value tensions are latent. This happens when there is an alignment between actors in pursuit of a common goal (as in the moments of ideation of the architecture and design projects) or when key players are temporarily out of the game (as in some moments of the dispute between Liverpool City Council and UNESCO over the preservation of the Liverpool Maritime Mercantile City). Value tensions become salient or explicit when the interests of some actors change or when a new player enters the game (such as when new actors appear in the development stages of architecture and design projects). Interestingly, tensions can also be **neutralized** when highly formalized evaluation technology reduces their visibility up to the point of neutralizing their potential effects. This does not mean that tensions do not exist, but that their effects are not allowed to emerge.

When tensions become salient, actors address them through two approaches: **polarization** and **integration**. Polarization happens when the value regimes underlying specific evaluative tensions are perceived and enacted as incompatible. Polarization typically leads to the exclusion of the actor supporting one of the poles from the debate. Integration instead happens if some alignment between different value regimes is worked out by the parties involved, re-framing conflictual situations into positive terms, so that different value regimes are no longer framed as oppositional.

Evaluative tool tension

The field of cultural administration and cultural information systems is characterised by value tensions centred on the evaluative tools and mechanisms employed. This situation marks a significant difference both with respect to the fields of cultural consumption, where tensions vary according to context, and cultural production and heritage management, where tensions are structured according to the interests of the actors involved. In cultural administration and cultural information systems**, tensions concern the most appropriate**

instruments to evaluate specific processes (such as culture-led urban regeneration through the Fàbriques de la Creació programme in Barcelona), the performance of an institution (such as the museums in Norway) or cultural projects (to be subsidised or produced, as in the cases of Barcelona and Norway). Besides, tensions emerge in specific discussions on the type of indicators (qualitative or quantitative) that are more suitable to measure the performance of the cultural and artistic sector at the national (Norway) or regional level (Italy), the cultural activity of a city (in Norway), or the performance of a museum (such as the National Museums in Italy).

In the case of cultural administrations, value tensions arise at the level of **instruments and indicators implemented for evaluation** (qualitative vs quantitative indicators or general vs specific evaluations), as in the cases of local grant-making in Spain or the monitoring of museums in Norway. However, at a more general level, tensions arise due to different valuations of the same assessed element (aesthetic vs social evaluations; aesthetic quality vs entertainment or pedagogic relevance) or in relation to how evaluations should be carried out. In Bureaucratic-led evaluation methodologies, value tensions arise in relation to the procedure, between tendencies toward its standardisation or its diversification, between uses of qualitative or quantitative measures, or in its adaptation to policy changes. In Experts-led evaluation methodologies, value tensions arise concerning the agency and proficiency of experts, as well as in relation with the criteria they use, which are more or less objective and transparent. On the contrary, in the case studies of cultural information systems, the value tensions focus on more specific aspects linked to the discussion about the indicators most appropriate to measure the cultural reality of a city, region or municipality or the performance of a museum. The discussion is therefore centred on whether it is more appropriate to use quantitative indicators (lumping) or whether these should be complemented with qualitative indicators (chunking).

In cultural information systems, **tensions are technical** and the ways to resolve or mitigate them imply a combination of quantification and qualification approaches. On the contrary, in the case of cultural administrations, the discussions focus also on the **content of the evaluative processes**. For this reason - and because of the number of actors involved - tensions are usually more explicit. Tension resolution is achieved by adapting the format and the dynamic of the evaluative procedure with the mediation of public managers (in bureaucratic-led methodologies), but simultaneously making the evaluation processes more participatory and accessible (in experts-led methodologies).

1.2 Connections between regimes of evaluation

In the prior paragraph, we presented evaluation regimes as silos for illustrative reasons. However, evidence from the case-studies shows that boundaries between regimes are permeable.

The **mechanism of participation**, in its various forms, plays a crucial role in hybridizing grammars, technologies, and methodologies of evaluation. This has been observed in the collaborative construction of indicators, the participatory management of an organisation, or in policy co-design. Through participation, **the subjective judgement of cultural practitioners is blended with the expert judgement of cultural professionals or administrators**. However, in many of these cases, the specificity and richness of the social context of the emergence of the evaluations made by cultural practitioners is lost in the instrumentalisation and quantifications made by experts and administrators.

On the other hand, the **logic of aggregation**, or lumping, connects information systems to public administration and, partially, cultural production and heritage management. A logic of aggregation implies judgements at the industry, field, or geographical area-level, whereby the specificities of the individual project, initiative or experience are lost in the pursuit of a broader perspective. Aggregation mainly characterizes cultural information systems. However, its logic is also present in cultural public administration as public officials use input from information systems to design policies and programmes. These actions, directly and indirectly, affect various cultural producers, organisations and cultural institutions. The use of

quantitative tools is due to the **need to generate global and precise evaluations of the cultural reality that are easily manageable by administrations**. However, this type of evaluation tends to omit specific aspects and contextual realities. Qualitative indicators, as evaluation tools, emerge from dialogues and confrontations with the actors and organisations affected by these evaluations. These actors (cultural practitioners, cultural producers or cultural organisations) often demand more participation and a less global and more qualitative approach to their realities.

2. Reflections

When selecting case studies at the beginning of WP3 (D3.1), an effort was made to highlight potential connections between cases belonging to different regimes of evaluation. That effort resulted in figure 3, which we report below.

Figure 4: Links between WP3 case studies
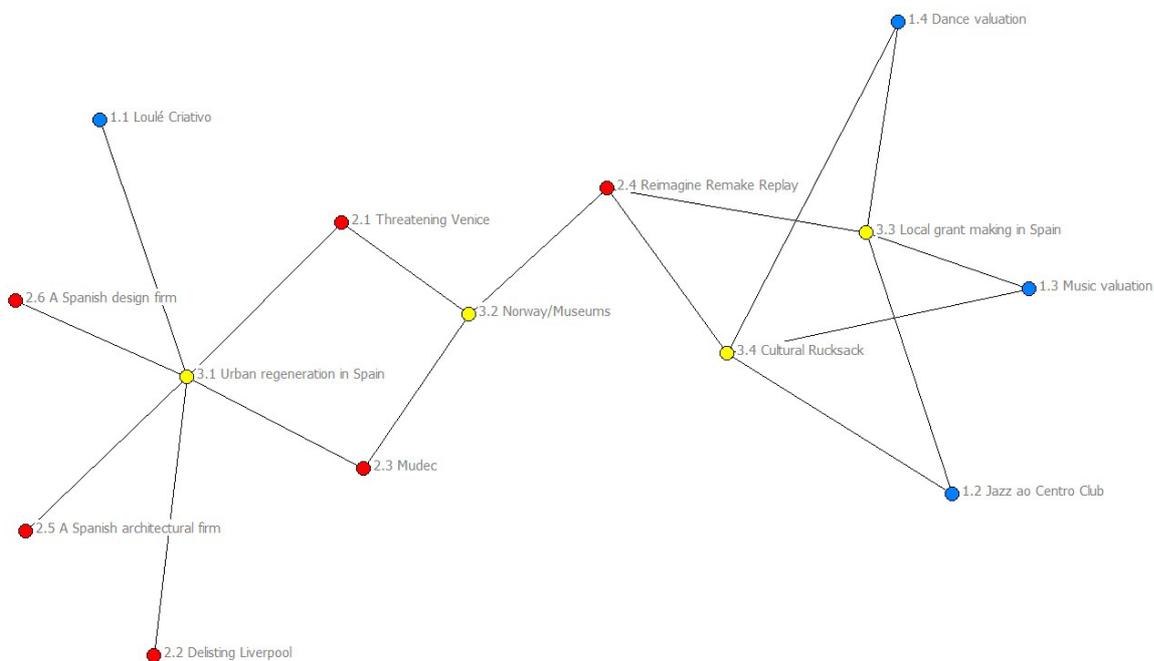
Source: D3.1.

The network was employed to trigger discussions on threads that could link not just WP3 cases, but also the work done under prior WPs. Indeed, the network suggested the existence of two main thematic clusters, one focusing on cases dealing with the issue of participation (right side), and one connecting case studies associated to public administration (left side). In the following pages, we present our reflections on these two themes.

2.1. Disputes around participation

In recent decades, gender and ethno-cultural diversity have been influential in changing and shaping cultural values, thus modifying how participation is perceived and fostered (see D1.1 in WP1). The feminisation of employment and socio-demographic changes (due to an increase in immigration) are two of the main factors that underlie an ongoing shift in European cultural policies from *cultural democratization*, "which involves a univocal hierarchy of artistic and cultural values and the promotion of selective types of cultural expressions",

towards a quest for *cultural democracy*, which is "linked to the promotion and participation of a diversity of artistic and cultural expressions without an apparent hierarchical order". This transition creates an underlying tension in contemporary debates around cultural participation (D1.1, p. 15, cf. Evrard, 1997). In essence, cultural democratisation has been criticized for dealing only with a limited set of cultural goods and actors (Donnat, 2011) that are derived from an institutional legitimation process and for neglecting the development of communities' own conceptions and valuations of culture (Evrad, 1997; Heinich, 2020a, 2020b). Empowered by the trends of *cultural democracy*, the destabilizing effect that diversity has on cultural legitimacy (Bennett, 2001) accompanies the emergence of a plurality of values, which unfolds in the challenges posed by the WP3 case studies in relation to cultural participation.

In this context of increasingly diverse cultural expressions and (e)valuations, across-topic comparisons focusing on participation challenges have revealed two **axes for reflection** that could contribute to negotiating, developing, and implementing more participatory processes, that is, more participatory initiatives, practices, and organizational arrangements.

2.1.1. Shades of participation

Expanding recognition of a wide range of forms of cultural participation implies different definitions of participation and involvement areas, including **participation in cultural practices, cultural decision-making, and institutional management.** Participation in cultural practices focuses on direct, personal engagement with cultural forms of expression (e.g., playing a musical instrument, dancing, pursuing a craft, listening to music, etc.). Participants' involvement in decisions-making related to, for example, an organization's cultural programming deepens their level of participative involvement, which can go farther to become integrated participation in the management of a cultural institution. Increasing participation in cultural decision-making and institutional management can be understood as a *cultural democracy* trend, since it involves citizenship as "active subjects and stakeholders in public policies by giving value to assembly decisions taken by active collectives and citizens" (Polityczna in Négrier, 2020, p. 21). Considering these different dimensions reveals the different shades of participation within the cultural sector.

Focusing only on more conventional forms of cultural participation (i.e., passive consumers or stakeholders that are not involved in decision-making) tends to overlook or conceal participation in cultural activities in which citizens engage more actively. In WP3, more committed forms of cultural participation practices place the very notion of cultural consumption at a crossroads and reveal the strategic influence of participants within institutions. Contexts of intense sociability and associative practices enable participants to become engaged to such an extent that they can influence and change the values promoted by their institutions (Loulé Criativo and Jazz ao Centro Clube). This grassroots engagement, eventually, may have an impact on formal aspects of the cultural organization itself, such as its institutional vision, objectives and partnership protocols (e.g., in Loulé Criativo´s network of partners, participants' active role has contributed to shaping the institutional protocols). In contrast, it can be challenging to involve cultural practitioners as institutional actors in the design and management of cultural programs (Mudec, RRR, and Spanish architecture firm cases). In most of the WP3 case studies analyzed, democratising valuations remain a matter of external representation, as institutional actors often remain solely responsible for translating democratising principles into cultural programs or making strategic decisions.

The difficulty of grasping the "core" valuations of participation, thoroughly representing the intangible values of culture and the different levels and complexities of cultural participation, challenges standard forms of informing cultural policies. While our research has revealed the broad scope of different possible valuations (and tensions) attributed to cultural participation, surveys on cultural consumption do not capture this wide spectrum of intangible dimensions. It is difficult to capture the "core" valuations of participation for two main reasons. First, the grammars of valuation for individuals are more diffuse and less rationalized than those used in formal technologies and methodologies of evaluation. Secondly, participants' valuations are site- and time-specific and relate to broader social spheres connected with participants' habitus and context, as well as the content of the specific cultural participation. In contrast, measures of cultural participation and consumption tend to focus on 'countable' aspects related to the content of the cultural

participation, such as frequency of participation in particular cultural activities (cf. D3.9). This is, in part, a function of a mismatch in methodologies for capturing the qualitative and intangible valuations associated with concrete practices of cultural participation, but also the larger challenge of adequately capturing the shifting nature of these valuations which are generated in specific circumstances, with specific experiences and practices.

2.1.2 Approaches to managing tensions of participation

Making visible participatory tensions can generate positive dynamics and effects. Institutional inertia and management tendencies to cover or subsume tensions can short-circuit the outcomes derived from the visibility of tensions relating to participation, such as self-awareness, debates, discussion, and facing problems instead of avoiding them. These outcomes can be tools to face dissonances and to imagine new agreements and arrangements that can enable the institution to evolve and adopt more fluid and open 14organizational strategies. Informal evaluative approaches tend to reveal value tensions underlying participation, which can enable citizens' awareness of the conflicting aspects involved and encourage discussions about participatory processes. This is highlighted, for example, when dealing with the participation of under-represented groups in heritage institutions (e.g., Mudec). In contrast, highly formalized evaluation regimes tend to subsume conflicts within internal management processes and to respond to a "neoliberal logic of fierce competition" (D3.7, p. 52), producing the expected positive outcomes to (continue to) secure monetary resources (RRR case).

(Im)balances of power among the organizations and actors involved also plays a role. When power is equally distributed among those involved, bottom-up citizen participation and discussions about participatory processes are encouraged. In a situation of asymmetrical power (i.e., power imbalance), a suspension of immediate tension mitigation at the management level appears to generate favourable consequences such as enabling open discussion and dialogue involving a variety of perspectives. This is especially highlighted in situations involving public authorities and bottom-up citizen participation on cultural matters, which contribute to the broader public sphere. In managing visible value tensions, participative initiatives interact with both the current and contingent distribution of political and administrative power. Furthermore, the interaction of different levels of power must also be taken into account. In some situations, a weaker central state presence can provide more discretion for local government actions and more space to civil society organizations and networks in advancing community participation and social inclusion (Spanish architect firm and Urban cultural policies in Spain).

2.2. The influence of neo-liberalism, competition and economic value on public actors

WP3 case studies analyzed a great number of public institutions or organizations operating in close relationships with the public sector. This public oriented-focus characterized, obviously, case studies in the field of cultural public administration. However, also actors operating cultural information systems, managing heritage or cultural producers are often connected to the public sector, if not part of the public sector themselves. By analyzing these cases comparatively, two issues emerged as crucial: the widespread use of competitive evaluative frameworks in the public field, and the role of "economic value" in shaping actions, with all possible internal contradiction and tensions in the meaning of "economic". Both issues relate to the influence of neo-liberalism on evaluation practices in the cultural field, thus giving the opportunity to further explore a research theme that has been already investigated under WP1 and 2.

2.2.1 Shades of competition and quantification

In WP1, neo-liberalism is defined as 'a politico-cultural belief that advocates monetary exchange and free markets as the best method to organize human activity' (Alexander 2018, p. 24). This implies a strong belief in the **market and competitive forces** as mechanisms for the distribution of resources in societies. When

markets do not exist on their own, public action shall try to replicate this logic through the adoption of administrative solutions aimed at the **construction of quasi-market**.

WP3 cases involving public administrations show many examples quasi-market arrangements, where **evaluative systems emerge as components of competitive schemes**. These schemes can be explicit, as in the cases of Local grant making in Spain or the Cultural Rucksack in Norway, where cultural producers openly compete for public funding; or implicit, as it has been observed when unique museums or municipalities are artificially set into competition through indexes and rankings (Monitoring Norwegian museums or National museum levels of quality in Italy).

In line with WP1 findings[1], country-level differences emerge when looking at how neo-liberalism informs evaluation systems, methods and technologies. In particular, **differences emerge in how neo-liberal principles are formalized and explicitly integrated in the administration of culture**. The contrast between Venice and Liverpool is particularly telling in this regard. While the neo-liberal agenda constantly inform policies in the UK, in Venice neo – or rather old - liberalism supports *laisse-faire* policies leading to economic exploitation (e.g. tourism, big ships).

As observed in the case studies, **competition is often coupled with quantification**, which may take place ex-ante and/or ex-post. Indeed, the efficiency of numbers is instrumental in monitoring agents' behaviours in competitive processes and providing evidence of value for money. Quantification has been observed in the form of advocacy-led measurement (RRR), ranking (Cultural Idex Norway), performance indicators (Norwegian Museums, Urban cultural policies in Spain), and scoring systems (Local grant making in Spain, the cultural Rucksack).

However, while at the outset the systems of evaluation analyzed are inspired by competition and quantification, **indicators are rarely the only judgment device employed by decision-makers**, as it has been extensively discussed in section 1. WP3 case studies show situations in which professional judgment complements quantitative information (Grant making in Spain, Urban regeneration cases), but also contexts where numbers play a marginal role in professional decision making (Cultural Rucksack), or even situations where indicators are molded to achieve an outcome reflecting the professional understanding of a field (National museum levels of quality in Italy). Moreover, the cases of Venice and Liverpool highlight situations of over-complexity where calculative efforts are often contested (see the great number of documents and quantitative studies used to "demonstrate" various issues).

2.2.2 Problematising economic value

In WP2, economic value emerged as central in the cultural production and cultural administration domains, embedded in discourses around profitability, cost control, and economic development.

Moving from WP2, in WP3 we analyzed diverse situations where actors mobilized "economic value" as a justification for action. However, the variety of justifications pertaining to the economic realm appeared so great that conflating everything under the label "economic value" turned out to be misleading, potentially running the risk of reducing "economic value" to an empty concept.

Indeed, we believe that one of the main contributions of WP3 case studies is to highlight **three distinct discourses involving the economic sphere** (the word value is avoided on purpose here) and operating at different levels:

- Economic (vested) interest: as the Venice and Liverpool cases show, *individuals or groups* aim at maximizing returns at the individual or group levels, often ignoring impacts of negative externalities for society at large. Surely B&B owners and cruise companies (Venice) or real estate developers

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[1] In WP1, countries were clustered according to the degree of influence of neo-liberalism on cultural policies. Four clusters where identified, namely situation where neo-liberalism is dominant (i.e. UK), established (i.e. Spain), emerging (i.e. Italy) or resisted (i.e. Norway).

(Liverpool) value the city in economic terms, but they do so from the perspective of short-term individual return, minimizing impacts in terms of over-tourism and/or heritage loss.

- Economic development: this discourse concerns the development of an area – city, region, or country – in terms of employment and economic well-being of its inhabitants. Heritage, or culture more in general, are seen as resources for economic development at the *societal* level, yet the interplay with other forms of development (social, cultural, environmental) is also considered.
- Financial viability: this is a key concern for *organisations* operating in the cultural domain, which also affects public administration funding decisions. Financial viability relates to organizational efforts towards breaking even, in not-for-profit contexts, or profitability, among for profit companies like architecture or design. The need to achieve financial viability justifies decisions at the organizational level, especially concerning the balance between artistic value and mass entertainment.

As we will outline below, unpacking "economic value" and how it is mobilized at different levels is crucial to understand how tensions and conflicts unfold.

2.2.3. Patterns in managing conflicts and tensions

Given the multiple meanings associated with "economic value", it is not surprising that, according to WP2 findings, the economic sphere triggers the highest number of tensions, contrasting with aesthetic, democratic and cultural diversity-driven valuations (and, often involving tensions within the economic regime itself).

WP3 complements the work done in WP2 by allowing a better understanding of how tensions are dealt with.

In terms of patterns in managing conflicts, focusing on tensions triggered by economic evaluations, two different ways of dealing with them have emerged, with distinctive effects on the tension itself:

- situations where the "hot moments" are **provisionally frozen**, but the tensions remain, waiting for the next conflictual round. This is found in Liverpool and Venice where economic interests interact with broader visions of economic development and heritage preservation;

- situations where the tension is **worked out**, reaching some balancing/solution. This was observed in Local grant making in Spain, where redistributing resources solved the tension relating to recurrent funding to the same entities. Similarly, in the Cultural Rucksack case, tensions concerning budgetary constraints are solved through long-term planning, balancing and improvement.

The situations above suggest that when economic interests are involved, actors can only temporarily mitigate tensions. When this happens, the idea of accepting the plurality of values sounds naïve as values are the expression of conflicts between opposed groups of interest. More than an ecumenical call for pluralism, a choice or selection is, in certain cases, unavoidable. On the other hand, we observed that actors can stabilize in a more enduring way the organizational-level tensions pertaining to financial viability.

3. Measuring and imagining the values of culture: looking back and forward

3.1 Looking back: links between W1, 2 and 3

The examination of a series of key factors of social and cultural change in WP1 (see D1.6) has allowed us to understand the axial space opened by the crisis of cultural autonomy and the values of artistic excellence in Europe. This crisis drew a space of continuously developing value vectors (cultural diversity connecting with cultural democracy and participation; economic value evolving in other extrinsic cultural values such as identity and wellbeing) refracted by specific social frames, political or territorial, and giving rise to new fields of axial tensions (in addition to the traditional tension between cultural and economic values, tensions between intrinsic and extrinsic values, between social and economic goals, between forces tending towards

homogenization and others towards diversity). The value configurations and tensions emerging in the different areas of cultural practice that we have analysed in WP2 took shape in the context of these underlying axial fields, variably activating some of their traits (see D2.7).

Axial tensions and conflicts have been further investigated in WP3 analyzing how they are managed in different regimes of evaluation using different evaluative tools and developing different tension resolutions. In this sense, our analysis has allowed us to identify the **contextual conditions** that activate tensions in different domains as well as to **unpack the complexity of specific values**, like "economic", or processes, like participation, that are understood and managed in different ways by actors. Going beyond the value configurations identified in WP2, we have been able to group the valuations detected in WP3 into three main evaluative vectors (social, cultural and economic). Finally, we have also been able to identify how cultural values come into tension with social values in the field of cultural consumption; with economic values in the field of cultural production and heritage management; and with both economic and social values in cultural administrations, so providing a more comprehensive and integrated vision of the conflicting dynamic of valuation in the cultural sphere today.

3.2 Looking forward: implications for WP4 and WP5 research

3.2.1 Implications for WP4

WP4 focuses on how to foster the plurality of values of culture and, in particular, cultural diversity, equality and inclusiveness. WP3 can inform these challenging tasks in three main ways.

First, WP3 cases have shown how tensions between values or different interpretations of the same value are **contextually contingent**. What leads to salient frictions in one situation can be worked out smoothly by actors in other contexts. Regarding policy implications, this observation suggests avoiding developing one-size-fits-all policy solutions and grounding instead policy guidelines on a comprehension of the local context.

Second, WP3 findings have shown how **different interpretations of the same value exist**. In section 2 of this document, we spoke, for instance, about different shades of participation and economic value. Understanding variations is crucial to make sense of complexity, tensions, and related resolution strategies. The implication for WP4 is to avoid looking at cultural diversity, equality and inclusiveness as closed boxes, exploring instead the variety of ways in which actors interpret and operationalize them.

Lastly, according to WP4 proposal, the work conducted should lead to recommendations for better capturing the plurality of cultural values in statistical information via quantitative data, and improving the assessment practices of cultural institutions. In this regard, WP3 findings can sound a word of warning. Overall, what has emerged by looking at the practice of cultural administrators, and even, to same extent, data producers, is **a limited "trust in numbers" in the cultural sphere** (Porter, 1995). This suggests a careful consideration about whether further investments should be directed towards developing additional indicators or focus on other strategies like training (and recruiting) more knowledgeable professionals or designing evaluation mechanisms involving qualitative information and deliberative processes.

3.2.1 Implications for WP5

The goal of WP5 is to allow a contextualized assessment of the research outcomes of previous WPs through co-creative work on selected cases, aiming to contribute to improving evaluation methodologies in some crucial areas of cultural policy. Co-creation approaches require the integration of different actors (i.e., participant-consumers, professionals, administrators, and policymakers), thus broadening the coverage of cultural values as they are integrated into practice. Some of the research outcomes of WP3 provide general guidance for the assessment processes involved in the three axes of WP5.

Axis 1 on cultural strategic planning. The UNESCO cases analyzed in the fields of heritage management and cultural production suggest that **multi-axial concepts** such as "sustainable development" have the capacity to **bring together different actors** within a common view for strategic planning. These results suggest that the analysis of cultural strategic planning should consider the identification of concepts that can help to build transversal cultural values in the process of achieving common perspectives on environmental, social, economic and heritage preservation strategies.

Axis 2 on culture-led urban regeneration. The research outcomes relating to the public administration field have shown that **bureaucratic-led evaluation methodologies tend to break down the barriers** between evaluators and evaluated actors that experts-led evaluation methodologies tend to create. In participatory urban regeneration processes, it is important to know the extent to which a local administration is willing to rely on more bureaucratic-led evaluation methodologies (allowing communication and negotiation between evaluators and those being evaluated) or to include expertise elements in the evaluation procedure that do not preclude effective dialogue with stakeholders.

Axis 3 on cultural information systems. To explore the feasibility of implementing innovative measures for cultural information systems in order to better cover the plurality of values, the research outcomes of D3.6 and D3.9 need to be considered simultaneously to assess the meaningfulness of the information produced. Based on WP3 findings, we conclude that in addition to combining the two ideal-types of information management to address *measurements* and *judgements* (Heinich, 2020a), **incommensurable value principles must be considered through qualitative methods** (i.e., participant and non-participant observation) to address emotional aspects related to *attachments*, "which arguably [are] the core of consumption values" (D3.9, p. 9).

Appendix 1: UNCHARTED project – synoptic table of WP1, 2 and 3

WP1 influences on the configuration of values	WP2 and WP3 fields of (e)valuation	WP2 cases on the emergence of values	WP3 cases on evaluation systems
Gender and rising diversity	Television and new media	Amateur involvement in online music creation **Young people engaged in online arts and culture initiatives (RRR)** Digital audiences at live-streamed concerts **Cultural education through digital media (Cultural Rucksack)**	Not covered
Urbanization and social and spacial segregation in cities	Cultural participation and engagement/Cultural consumption	**Loulé Criativo** Informal and illegal musical practices in the time of Covid-19 Circus practice and spectatorship in Occitania Community-engaged artistic projects	**1.1 Loulé Criativo** 1.2 Jazz ao Centro Club 1.3 Music valuation 1.4 Dance valuation
Globalization and digitization	Cultural production and heritage management	Publishing conglomerate Three architectural firms **Mudec** Ferrara busker festival Roma exhibition Buda castle project	2.1 Threatening Venice 2.2 Delisting Liverpool **2.3 Mudec** **2.4 Reimagine Remake Replay (RRR)** 2.5 A Spanish architecture firm 2.6 A Spanish design firm
Neo-liberalism	Public administration	Barcelona City Council Xunta de Galicia Portuguese ministry of culture Bragança city council	3.1 Urban regeneration in Spain 3.2 Monitoring Norwegian museums 3.3 Local grant making in Spain 3.4 Cultural Rucksack
European historical and political experience	Cultural information systems	Not covered	4.1 Cultural statistics Norway 4.2: Regional cultural observatories in Italy 4.3 Cultural Index Norway 4.4. National museum levels of quality

Note: case studies in bold were relevant for WP2 and WP3 because of their richness and complexity

Appendix 2 UNCHARTED Project Glossary of terms

Micro Level

Values: shared mental representations necessarily connected to acts of valuation. According to Nathlalie Heninich (2020a), it is possible to distinguish between three meanings or dimensions of the idea of value. (1) Value "refers to the worth, importance, quality of an object". (2) "Once endowed with 'value', things become 'values' in the second sense of the term, that is, concrete goods". (3) "It refers to the abstract principles according to which 'value' (in the first meaning) is bestowed upon an object, thus transformed into a 'value' (in the second meaning)" (Heinich 2020a).

Valuations: They are acts of attribution of value to things or people (among other objects) that are made through measuring them, showing an attachment or judging them.

The three forms of valuation: (1) Measurement: Requires various instruments as codes, rewards or numbers to measure things. (2) Attachment: Involves gestures and attitudes (emotions). They are implicit, manifested indirectly through behaviours or narratives. (3) Judgement: Mechanism of value attribution by a subject to an object. The focus is on the speech acts in which it is manifested (Heinich, 2020a).

Value principles: they are abstract principles of value, in the third sense of value identified by Heinich (2020a), to which different but relatively similar valuations can be linked. Value principles have a higher level of abstraction than valuations. They have an important analytical utility, as they allow comparison of different value contexts.

Plurality of values: Since Max Weber elaborated his model of types of rationality, the idea of diverse spheres of value in modern society has been dominant in sociology. It is central today in pragmatist valuation studies (Lamont 2012). One of the most influential works in this tradition, On Justification (Boltanski and Thévenot 2006), develops a complete framework of six specific "orders of worth" or "polities". However, the existing value principles in a society or a social domain may differ in nature and number; this is a matter of empirical investigation. In subsequent work, The New Spirit of Capitalism, Boltanski and Chiapello (2005) identified the seventh polity and other researchers following the same line of thought found others (Stark 2009). Nathalie Heinich, who has also been close to it, identified a group of five specific value regimes in contemporary art in a study about artistic controversies (Heinich 1997).

Valuation/evaluation practices: Two conceptually different aspects exist that are conflated in the English word valuation: an aspect of "assessment of value" and another aspect of "production of value" (Vatin 2013). Lamont (2012) tends to avoid confusion, referring at the same time to practices of evaluation (meaning pure assessment of value) and valuation (thanks to the contrast, more clearly referred to as "giving worth or value"). But secondly, it is also important to acknowledge that often both aspects go hand in hand or are inextricable. Lamont (2012) sometime speaks of (e)valuative practices highlighting this fact. Depending on the circumstances, these two options are equally convenient.

Encoded / Enacted values: Encoded values are values implicitly embodied in objects, practices, or discourses. They can be decoded through acts of interpretation. Enacted values are values made explicit through certain valuations of objects or processes that affirm or materialize them, sometime giving them different interpretations. Enacted values participate in processes of value stabilization.

Meso Level

Valuation processes: These are social and cultural processes that involve intersubjective agreements and disagreements about a set of references, against which an entity (a good, a reputation, an artistic

achievement, etc.) is compared. In this sense, valuation processes involve, on the one hand, a negotiation about criteria and legitimate judgement (including conflicts and power struggles). On the other hand, the establishment of values in a relational (indexical) process, that involves distinguishing and comparing entities (Lamont, 2012).

Regimes of (e)evaluation: Organized ways of making (e)valuations by actors in different sectors of the cultural sphere. We distinguish between different regimes of (e)valuation: Grammars, Technologies, Methodologies, and Information Systems.

> **Grammars of valuation/evaluation in cultural practices of consumption**. On the one hand, grammar is the most used term in the pragmatist literature for referring to regimes of valuation and evaluation. On the other, in analogy with the idea of grammar concerning speech (set of implicit rules governing speech), the rules governing the ways of making (e)valuations by actors in cultural participation seem to be characteristically implicit. Valuative variations instead of value tensions characterize this type of evaluation regime.

> **Technologies of evaluation in cultural production and heritage management**. Lamont (2012) borrows the idea from Knorr-Cetina's (1999) concept of technologies of knowledge, meaning "social and cultural structures that channel, constrain, define, and enable the production and evaluation of knowledge" and include, on the evaluation side, "method of comparison, criteria, conventions (or customary rules), self-concepts, and other types of nonhuman supports". In the case of the area of cultural production and heritage management, we can speak of technologies of evaluation because the evaluative arrangements put in place, which can include judgement devices (Karpik 2010) of different kinds, are functionally articulated to production or management processes, being more or less explicit or implicit, routinized or ad hoc. Axial tensions between actors are characteristic of this regime of evaluation.

> **Methodologies of evaluation in cultural administrations**. It is the most explicit and formalized regime of valuation and evaluation, usually based on cicerone, the judgment device linked to expert opinions (Karpik 2010). They also involve a central element of accountability. In contrast with the other regimes, they are predominantly focused on evaluation and justification, even if they also include elements of valorization, directly or indirectly.

> **Information systems**. They constitute complex (e)valuation regimes oriented toward categorization, an (e)valuation dynamic to which classification and commensuration procedures contribute. Tensions about the most appropriate instruments and forms to evaluate characterize this evaluation regime (Evaluative tool tensions).

Value tensions and conflicts. They provide privileged perspectives on the dynamic of valuation and evaluation in the cultural sphere because they trigger measurements and justifications. In contrast with other pragmatist approaches to the issue of valuation, that being exclusively interested in universal questions can only look for conflictive situations, like Boltanski and Thévenot (2006)'s, in our case we analyze the interaction between the different areas of the cultural sphere and that significantly nuances our capacity to focus on conflictive situations only. We understand the existence of diverse degrees of value tension because these areas differ very much in that respect. And these differences also translate into different structures of the tensions and different kinds of mitigations or resolutions. Therefore, these tensions go from minor value dissonances internal to specific actors that hardly manifest as a problem, or more significant contentions between actors about the interpretation of some value or some object, to sharp confrontations between actors on incompatible grounds, leading to breakups. In this sense, we can distinguish different types of tensions.

Type of tension: There are different modalities of value tension. We can distinguish tensions between values, axial tensions between actors, between evaluation practices, and between interpretations of the same value .

Structure of tensions: Tensions are complex. Below the level at which the tension is manifested (opposing values, opposing actors interpreting the same value or confronting different values, or opposing evaluation practices), it always articulates other elements at different levels (i.e. values in tension are usually associated with specific actors that represent them and tend to be akin to certain forms of evaluation).

Tension's characteristics: They have to do with the strength or prominence of the tension. We can distinguish tensions that are strong/weak; implicit/explicit; latent/salient, etc.

Tensions Resolutions:

Contingent resolution. It refers to the fact that possible resolutions to value tensions are subject to circumstantial factors linked to the context of the evaluative practice, the habitus of individuals involved and the content of the (e)valuated object.

Value stabilisation. It refers to the degree a valuation process contributes to fixing the value of cultural works or actors to make it "uncontroversial or transportable across contexts". Therefore, this is part of a categorization process and a legitimization dynamic (Lamont 2012).

Integration. It refers to situations where actors exploit conflictual situations to re-frame the relationship between the evaluative logics involved. Integration lead to the emergence of new tensions.

Polarization. It refers to situations where actors frame the tension as binary opposition between alternatives. polarisation leads to conflict resolution by ejecting or temporarily silencing one of the poles of the controversy. Polarisation will propose the same tension repeatedly

Neutralization. It refers to situations where tensions are not allowed to become salient, thus blocking the learning potential associated with tensions. Most formalized and coherently developed system neutralises tensions.

Macro Level

Grammars of worth: Associated with Boltanski and Thévenot's (2006) idea of orders of worth. Used in community building, they support alternative definitions of value/importance. They are defined as supra-organisational patterns of activities through which individuals and organisations produce and reproduce their material subsistence and organise time and space (Lamont, 2012). They are symbolic systems, ways of ordering reality, shaping the experience of time and space. There is a diversity of orders of worth (see value plurality), which implies a plurality of evaluation criteria and a plurality of evaluation grammars. This represents a potential heterarchy or pluriarchy of values (Stark 2009). The definition of values in each order of worth is presented as a site of tensions, risks and no certainties, thus entailing: (1) The creation of compromises between actors concerning the value orders. (2) The requirement of constant agreements. (3) The need to coordinate their actions. (4) The justification of their practices. (5) Compromises or forms of involvement. (6) Mobilisation of frameworks in diverse contexts with the capacity to extend, stabilise and institutionalise different evaluation models.

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