Regional Monitoring and Capacity Building Unit (RMCBU)

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REGIONAL RESEARCH REPORT ON CULTURAL POLICIES AND TRENDS OF THE EASTERN PARTNERSHIP COUNTRIES

Studies and Diagnostics on Cultural Policies of the Eastern Partnership Countries

This Report has been prepared by the Regional Monitoring and Capacity Building Unit of the Eastern Partnership Culture Programme:

Mr. Terry Sandell, RMCBU Expert
Mr. Luciano Gloor, RMCBU Team Leader
Ms. Tetiana Biletska, RMCBU Capacity Building Expert

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<td>Base-line Reports</td>
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<td>CB</td>
<td>Capacity Building</td>
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<td>CCI</td>
<td>Cultural and Creative Industries</td>
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<td>EaP</td>
<td>Eastern Partnership</td>
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<td>EaP countries</td>
<td>Armenia, Azerbaijan, Belarus, Georgia, Moldova, Ukraine</td>
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<td>EaP region</td>
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<td>EC</td>
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<td>ENPI</td>
<td>European Neighbourhood Policy Instrument</td>
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<td>EU</td>
<td>European Union</td>
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<td>FCS</td>
<td>UNESCO Framework for Cultural statistics</td>
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<td>GONGO</td>
<td>Government-owned NGO</td>
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<td>HEREIN</td>
<td>European Heritage Network of the Council of Europe</td>
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<td>Member States</td>
<td>Member States of the European Union</td>
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<td>MoC</td>
<td>Ministry of Culture</td>
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<td>OVI</td>
<td>Objectively verifiable indicators</td>
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<td>the Programme</td>
<td>Eastern Partnership Culture Programme</td>
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<td>the Project</td>
<td>Regional Monitoring and Capacity Building Unit of the Eastern Partnership Culture Programme</td>
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<td>the Compendium</td>
<td>Compendium of Cultural Policies and Trends in Europe of the Council of Europe</td>
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<td>RMCBU</td>
<td>Regional Monitoring and Capacity Building Unit of the Eastern Partnership Culture Programme</td>
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<td>Seminar</td>
<td>Capacity building/training format based on lectures/presentations</td>
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<td>SWOT</td>
<td>Analyses of Strengths, Weaknesses, Opportunities and Threats</td>
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<td>TA</td>
<td>Technical Assistance</td>
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<td>Workshop</td>
<td>Capacity building/training format based on interactive and case/project related group work</td>
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Acknowledgments

This report has drawn on the support, advice and insights of many individuals and institutions. The Regional Monitoring and Capacity Building Unit of the Eastern Partnership Culture Programme thanks everyone who has contributed, directly or indirectly, to the research and analysis activities. The work focussed on Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine and has resulted in six Analytical Base-line Reports on the Culture Sector and Cultural Policy of the six Eastern Partnership Countries plus the present report. We also wish to express our gratitude to all the officials and experts of the national and local public authorities of the partner countries and to the EU Delegations to these countries. In addition we would like to thank the representatives of professional associations, civil society, knowledge-creating circles, independent cultural actors and donor institutions whose names are mentioned in each of the six Base-line Reports.
Preface

Research Objectives

The content of this report is the sole responsibility of the Regional Monitoring and Capacity Building Unit of the Eastern Partnership Culture Programme and reflects the opinion of contributing experts. It should not be taken to reflect the views of the European Commission.

This report is intended for a broad range of audiences that includes all culture stakeholders in the countries of the Eastern Partnership and the European Union. It summarises results of the Studies and Diagnostics on Cultural Policies of the Eastern Partnership Countries carried out by the Regional Monitoring and Capacity Building Unit of the Eastern Partnership Culture Programme from October 2011 to March 2012 in the six Eastern Partnership countries – Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine. The studies focus on the national cultural policies of these countries and are practically orientated to provide strategic guidance to the entire Eastern Partnership Culture Programme and to all activities of the Regional Monitoring and Capacity Building Unit Project.

The studies were conceived as an update and an addendum to the Needs Assessment 2008 commissioned by the EC for the launching of the ENPI East Regional Cooperation on Culture. A quick initial assessment taken during the inception phase of the Project in April – May 2011 and during preparation and implementation of the research visits to partner countries, made it evident that the situation in the cultural domain had changed significantly since 2008. New policy developments and trends in artistic life as well as the general political climate and context in the Eastern Partnership countries had changed to a degree that demanded the conducting of new research, even if based on the outcomes of the 2008 research mentioned above. Therefore, a tailor-made system to analyse the current situation in the culture sector of the EaP countries was elaborated by the RMCBU.

These reports are primarily based on conceptual comparative analysis of the countries’ specific policies with applicable international standards exercised by the RMCBU in cooperation with six local experts and guided by an international expert. The diagnostics has aimed at describing the base-line status of the culture sectors of the EaP countries individually and jointly and at identifying specific areas of Eastern Partnership policies in the field of culture to be reinforced by the Programme.

The results of the research are presented as a "complex report". It consists of six Analytical Base-line Reports on the Culture Sectors and Cultural Policies of the Eastern Partnership Countries and a Regional Research Report on Cultural Policies and Trends of the Eastern Partnership Countries which gives an overview of all the EaP countries, identifying main priority areas for intervention in the cultural domain of partner countries for the period up to March 2015. The seven reports will facilitate the monitoring of culture in terms of its contribution to social and economic modernization of the EaP countries.

Report Structure

The report consists of five main parts, as follows:

Section 1: Introduction to the Context and Methodology of the Research provides information on EU’s regional policy context, sources of definition of European and international culture-related policy standards, the analytical criteria applied in the studies as well as cultural domain assessment indicators. The diagram presented in Annex 1 reflects interconnections between the analytical categories guiding the research and presents evaluation of the status of culture sectors.
Section 2: *Themes Emerging from the Research* identifies main themes and issues identified throughout the research that will shape further development of the Eastern Partnership Culture Programme and the work of the RMCBU.

Section 3: *Some Aspects of the Current Stage of Development of the Cultural Sector in the EaP Countries* provides a review of current trends in the culture domain of the countries participants in the Eastern Partnership Culture Programme.

Section 4: *Major Findings of the RMCBU Research Visits.* The studies began with six research visits to the EaP countries undertaken by the RMCBU in November – December 2011. This section presents the results of these visits. The report on national stakeholders’ SWOT assessment of cultural policy and priority needs undertaken following the visits in January-March 2012 is presented in Annex 3. Outcomes of the visits to the countries along with results of the above SWOT assessment have been included in the seven reports. We would like to note that both sources of information reflect primarily the vision of the national stakeholders of the Programme representing the public and private sectors and civil society.

Section 5: *Recommendations* consists of recommendations resulting from the studies that are orientated to providing strategic guidance to the entire Eastern Partnership Culture Programme in general, and to the activities of the Regional Monitoring and Capacity Building Unit Project till March 2015 in particular.

**A Tool to Assess Progress in the Culture Sector**

The six Base-line Reports are intended to be a "living tool". In the course of the Eastern Partnership Culture Programme, same indicators will be used again from time to time to assess development and change achieved in the culture sector. These indicators and the country reports could be of use also for the EaP national authorities who may find these a valuable instrument for assessing changes in the status of countries’ culture sectors. For example, it could help in measuring exact progress of a certain country in improving its legislative framework or shifts in the development of public-private partnerships through improvement of communication policy.

The six Base-line Reports were shared with the national authorities and other stakeholders of the EaP countries at the draft stage and the main conclusions of the Regional Report were presented in Brussels in September 2012 at the Expert Seminar on the Cultural Policy of the Eastern Partnership (Platform 4) and at the First Regional Conference of the Eastern Partnership Culture Programme held in Tbilisi, Georgia in October 2012. National authorities have been invited to comment on or contribute with complementary information. Some of the Base-line Reports have been updated based on the additional information provided by the national authorities during September – November 2012.

The six Base-line Reports in English and national languages and the Regional Research Report in English and Russian are published electronically on the Programme’s website (www.euroeastculture.eu) along with contributions from national authorities, where contributions were addressed to the RMCBU. It is hoped that this will stimulate comments and contributions from the Programme’s stakeholders and other interested parties, leading to debate and using www.euroeastculture.eu as a regional platform for dialogue on cultural policy matters for the EaP countries and beyond. We also hope that this process will contribute to promoting better integration of culture into national, regional and local development policies.

**Experts Who Participated in the Preparation of the Report**

This research was led by Mr. Luciano Gloor, RMCBU Team Leader and Ms. Tetiana Biletska, RMCBU Capacity Building Expert. Ms. T. Biletska was also responsible for all stages of the practical implementation of the studies and diagnostics, collection and analysis of the
outcomes of the RMCBU research visits to partner countries, and for final consolidation and editing of the seven reports.

Mr. Terry Sandell, RMCBU expert provided methodological and other guidance for the studies, including the development of the system of analysis of the situation in the culture sector in the EaP countries and its analytical categories and indicators, structuring of the work, instructing six local experts on analytical research for the country reports and the drafting of the texts of the seven reports.

RMCBU local experts Ms. Seda Papoyan, Mr. Jahangir Selimkhanov, Ms. Olga Klip, Ms. Manana Tevzadze, Mr. Sergiu Musteata and Mr. Mykola Skyba were responsible for preparation of the analytic research surveys presented in section 3 of the Base-line Reports for Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine respectively. Their work included collection of descriptive and statistical data as well as comparative analysis of criteria and standards set out in the above-mentioned study guidelines.

For more information on the report, its methodology and work conducted, please contact Ms. Tetiana Biletska, RMCBU Capacity Building Expert at tetiana.biletska@euroeastculture.eu Mr. Luciano Gloor, RMCBU Team Leader at luciano.gloor@euroeastculture.eu
1. Introduction to the Context and Methodology of the Research

As emphasized in the individual Base-line Reports, since independence the six Eastern Partnership countries have had to face enormous challenges and problems. In nearly all countries, while culture is seen as important, political realities often mean that culture is not given priority for funding. For the EaP countries however this has more often than not meant a desperate, reactive, day-to-day struggle for survival of the cultural sector and its infrastructure rather than any visionary, forward-looking plans. Again, as noted in the individual country reports, clinging on to the past and preserving what one can was the main thrust of policy in the post-independence period. Those managing the cultural sector were forced to try to make the systems and processes work because they were the only ones in place (as well as being familiar) and to compromise in the hope that one day things would be better. It was not a question of the ‘better as an alternative of the good’ so much as of the ‘bad at least being better than the worst’, with the status quo being less dangerous than the unknown.

Culture and cultural development do not develop in a vacuum and the environment in all the Eastern Partnership countries, quite apart from the economic and funding aspect alluded to above, has in general not been conducive to positive development and change. All the countries inherited political problems and challenges that directly impacted on culture. This included the legacy of Soviet linguistic, demographic, territorial and ethnic policies which have created enormous distortions and barriers to peaceful, sustainable development in the cultural area. Diversity, to take one example, is an extremely important factor that needs to be taken fully into account in at least five of the six countries when developing cultural policy. Diversity may well be a cultural blessing in the context of a stable prosperous society but in certain circumstances it can unfortunately be a political curse. Conflicts, tensions, lack of trust, the tricks, injustices and contradictions of history all have slowed up and greatly complicated positive changes in the EaP countries.

In addition to this, and as noted in the individual Base-line Reports, there has been a myriad of other challenges in all the countries including weak institutional infrastructure, corruption that poisons a society and its values, instability, and sometimes even loss of confidence about the future. Against such a background being a Minister of Culture or the Chair of a Parliamentary Culture and Heritage Committee or a Presidential Adviser on Culture has probably been as frustrating as being a struggling artist, museum curator or librarian.

Types of Studies and Diagnostics Used for the Analytic Research on the Culture Sector of the Six Partner Countries

Descriptive

There has been relatively little study of culture in the EaP countries from an economic, social, developmental or culture policy perspective. Some good basic work has been done by the Council of Europe, particularly through the European Programme of Cultural Policy Reviews, the Compendium of Cultural Policies and Trends in Europe project and the HEREIN network (European Heritage Network). The European Cultural Foundation has also produced general introductions related to the cultural sector in three of the countries and useful reports on the non-governmental sector in the EaP countries is currently being commissioned and funded by a Polish organisation. There exist other individual reports and studies, some of which are now out of date or of limited current use.

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1 A report on the condition of NGOs and independent culture in Belarus (http://kulturaenter.pl/pliki/pdf/Bialorus_E.pdf) marked the opening of a series of seven reports exploring the independent cultures and NGOs in the Eastern Partnership countries and Russia. The project is co-financed by the Minister of Foreign Affairs in the Republic of Poland under a cyclic programme "Promotion of knowledge about Poland".
One solid resource is the Compendium, which has been developed over many years and its basically sound categorisation and methodology can of course be drawn on for any 'descriptive' work undertaken within the EaP programme. While the Compendium has many qualities, some of its obvious weaknesses are that Belarus is not a participant while the quality and density of the information is not always consistent. In this respect, because of the absence or very limited amount of research on cultural development and cultural policy taking place in the EaP countries, their entries in some cases are not as comprehensive as for other countries.

**Statistical**

The difficulty of defining and gathering cultural statistics has been challenging even in developed European and other countries and is, and will remain, an issue for some time in the EaP countries where there is a struggle with meaningful data collection, even in sectors far less complicated than the cultural sector.

There are important factors, which make the defining and collection of cultural statistics particularly challenging anywhere. While it is true that in the EaP countries since Soviet times simple, traditional cultural statistics such as the number of theatres, museums, libraries, audience numbers etc. have been collected, these statistics are generally not very helpful in terms of management, analysis, planning or policy formulation.

In Europe and in many other parts of the world, the recognition of the economic benefit of culture has led over the past decade in particular to numerous types of categorisation of culture and cultural activity and statistical frameworks, some international, some national. With increasing prominence given to the potential social and 'well-being' benefits of culture (e.g. in relation to diversity, social inclusion/cohesion and intercultural dialogue), culture and cultural activity have been further categorised and new statistical frameworks developed.

What makes the area of cultural statistics so complicated is that the concept and definition of culture keeps changing because culture and cultural activity itself is going through revolutionary change as a result of digitisation, globalisation and migration.

In the EaP countries (as in the former Soviet Union in general) there has been a tendency to continue to see culture narrowly and statically defined. This definition sees culture as consisting almost exclusively of heritage and 'high' classical or tradition-based culture, plus ethnic folk culture. This problem of a non-dynamic, narrow definition of culture is a major stumbling block to cultural policy development and modernisation. It also inhibits the development of 'culture and...' agendas (e.g. culture and employment, culture and social cohesion, culture and 'well-being' etc.), which are becoming an integrated part of economic and social policy and planning in most European countries.

Thus, while European countries face the problems of constantly changing the frameworks and definitions for their cultural statistics because of the dynamic nature of culture in the post-modern world, the challenge for the EaP Culture Programme is to help to move the EaP countries away from a fossilised Soviet tradition where culture was defined simply as what the Ministry of Culture does, and anything the central Ministry does not do is ignored as not being 'culture'. Even where this tradition or mentality is slowly weakening there is a dominance of state culture and lack of any systematic attention to the independent, private and commercial cultural sectors.

Promoting at a state authority level a dynamic understanding of culture similar to what has been accepted to a greater or lesser extent by most countries in Europe is going to be an important challenge in the EaP countries. Existing internationally recognised frameworks and models should be introduced or promoted wherever possible to reinforce other efforts to encourage a more modern approach to culture and its definition.

In 2009, UNESCO produced, after extensive consultation, its Framework for Cultural Statistics...
(FCS), which replaced the 1986 Framework. In the recent past UNESCO ran a training course on the FCS for statisticians from the EaP countries and some other former Soviet countries. It seems sensible to try to support the use of the FCS within the EaP Culture Programme. The FCS captures exhaustively much of the economic dimension of culture even though it needs further development in relation to the social dimension (especially related to cultural participation and intangible cultural heritage).

The strength of the FCS is that it is international and therefore allows international comparison. It incorporates other established international classification systems such as the International Standard Industrial Classification (ISIC) for cultural production activities, the International Standard Classification of Occupations (ISCO) for cultural employment, the Central Product Classification (CPC) for cultural goods and services, the Harmonised Commodity Description and Coding System (HS) for international flows of cultural goods, the UN Trial International Classification of Activities for Time-Use Statistics (ICATUS) and so on.

The major and obvious weakness of the FCS is that it is extremely detailed, well beyond the needs of the EaP Culture Programme and the current statistical capacities of the countries. In trying to promote it, however, it does not matter if 95% or more of the categories are neglected, as any use of it will help to reinforce UNESCO international norms in the EaP countries.

In addition to the FCS, there are also useful EU reports and studies related to cultural statistics and measurement (quantitative and qualitative) which flowed from the EU's Statistical Programme Committee and the setting up of LEG-Culture (Leadership Group on Cultural Statistics). The latter led to the European Commission's "Cultural Statistics in the EU" (3/2000/E/No 1 - 2004). This has in turn led to Eurobarometer surveys covering culture and the Eurostat 2007 Cultural Statistics Pocketbook, which have categorisations that can also be used or adapted for the EaP Culture Programme as necessary.

The latest stage of this EU developmental work is the European Statistical System Network on Culture, a 2009-2011 (ESSnet-Culture) project that produced its final report in late 2011 setting out the work done by four task forces, which covered framework and definitions; financing and expenditure; cultural industries; and cultural practices and social aspects of culture. The frameworks formulated by the task forces and the experience in introducing them should be promoted to the EaP countries who should be encouraged to participate actively.

**Analytical**

While in Europe and beyond much has been developed in terms of descriptive frameworks and categorisations for the cultural sector, only some of it is of practical use in terms of serious analysis. Thus, while it seems that for more than a decade there has been much written and discussed about indicators for the cultural sector, it is significant that even a country like Finland, which has a strong tradition of cultural policy research, is only just developing a framework for cultural indicators (see "Effectiveness Indicators to Strengthen the Knowledge Base for Cultural Policy", Ministry of Education and Culture, 2011).

In this context and against the background of what will be the special needs in the EaP countries and the relationship of the EaP Culture Programme to those needs, it is recommended that this is the area where flexible categorisation and approaches need to be developed.

What is needed is neither the traditional cultural sector categorization nor its numerous variations where serious inconsistencies (that have been discussed within the RMCB Unit) normally exist anyway. If we look at a programme as consisting basically of inputs, outputs and outcomes, then the most important of these three elements in terms of the EaP Culture Programme is going to be its direct and indirect outputs. It therefore seems appropriate for any analytical work i.e. studies and diagnostics, to focus on this area.
It is an accepted fact that the choice of analytical or evaluation areas is not neutral and will tend to influence behaviour and programme direction. With this in mind, it is important to look into what the EaP Culture Programme is expected to achieve in terms of outcomes.

Those outcomes are not going to be seen in terms of culture/art forms but in their contribution to democratisation, modernisation and reform in the EaP countries. It is therefore more appropriate to set cultural categories in which those EU aspirations for the EaP countries are intrinsic. Categorisation in that form will facilitate active questioning, and will influence the direction of the EaP Culture Programme and hopefully the official and independent bodies and cultural players locally.

**Specific categories for analytical work**

It is therefore recommended that for analytical work a higher level of categorisation should consist of five areas under which other areas or questions would be categorised:

- **Cat. 1 CONTEXT/CLIMATE WITHIN WHICH CULTURE OPERATES**
- **Cat. 2 CREATION/PRODUCTION**
- **Cat. 3 PROVISION/TRANSMISSION/DISSEMINATION**
- **Cat. 4 ACCESS**
- **Cat. 5 PARTICIPATION**

In terms of capacity-building, the first three categories encompass modernisation issues, people who work in the cultural sector, cultural and creative industries (CCIs) and the general health/strength of culture in a country/in the EaP countries. The latter two categories encompass democracy issues, publics, lifestyle and identity dynamics and the state of audience development.

The five categories can then be broken down to reflect cultural policy areas, issues and goals as follows:

**Category 1: CONTEXT/CLIMATE**

- Legislation, tax, registration and employment issues affecting culture
- Transparency and corruption
- Provision and dissemination of official and public information
- Piracy and intellectual property context
- Integration of cultural policies in other policies and strategies
- Accountability and openness in practice
- Economic contribution of the cultural sector
- Perception of the social value of culture
- Role of the independent and NGO sector
- Role of the private and commercial sector
- Press, media, internet and specialist publication interest in culture and cultural issues
- Level and sophistication of cultural monitoring, evaluation and research
- Perception of contribution of culture to human and personal development
- Level of responsible advocacy and lobbying

**Category 2: CREATION/PRODUCTION**

- Education and training (creativity in schools, arts education, specialised technical and professional development provision at secondary, tertiary and postgraduate levels)
- Digitisation policies, practice and dissemination related to the culture and heritage sector
- Cultural & Creative Industries (level, sectors, problems, potential)

**Category 3: PROVISION/TRANSMISSION/DISSEMINATION**
Relevance and quality of cultural policies at central, regional, municipal and local levels
Cultural infrastructure provision
Provision of financial and other forms of support
State provision (per capita expenditure and other standard European indicators)
Other forms of provision
Location of cultural activity and production (capital city/regions; urban/rural)
State/public, commercial/private, independent/NGO mix in terms of cultural activity/production and heritage activity
Internet connectivity

Category 4: ACCESS

Knowledge, information and awareness issues
Cultural rights and diversity (legislative provision and other actions dealing with this)
Access and obstacles to access
Access and use of internet for cultural purposes
Audience development strategies
Access by minorities to cultural support

Category 5: PARTICIPATION

Inclusion
Cultural participation
Cultural consumption
Household expenditure on culture

This categorisation was used as a background for the RMCBU research visits, and in particular for focussing the work of the experts on the Base-line Reports. See Annex 1: Diagram on Analytical Criteria for Comparative Studies and Diagnostics on Cultural Policy of the EaP Countries and Annex 2: Indicators for Monitoring of the Function of Culture for details. The indicators correspond to the structure of section 3: Research Survey of the Base-line Reports.
2. Themes Emerging from the Research

As described in the Section 1, the background to the research was focusing on five areas:

- the context for culture in each of the countries,
- creation and production,
- aspects of the provision, transmission and dissemination of culture,
- issues related to access to culture,
- cultural participation.

Implicit in this is the question of democratisation and modernisation; the degree to which there is or is not a positive climate for culture and cultural production; to what extent the cultural system is 'open'; to what extent the countries are able to capitalize on current revolutionary developments affecting culture, including digitization, the Internet and changes in how culture is 'consumed'; how the producers of culture and the consumers of culture relate to each other within the system; and finally what the development, capacity-building and training needs might be in the light of these elements.

Certain themes and needs emerged from the research including:

(i) The post-independence period characterized as ‘survival’ is beginning to be part of the past as new green shoots are appearing and light is beginning to be seen at the end of the tunnel. In this respect the Eastern Partnership Culture Programme is happening at the start of a new era when fresh approaches are appropriate.

(ii) The Eastern Partnership countries differ from many of the EU member states in that the 'cultural market' and both the private/commercial cultural sector and the independent/NGO cultural sector are very weak.

(iii) As a result of this, the cultural sphere is both relatively vulnerable and underdeveloped with, 'faute de mieux', a disproportionate role being played on a day-to-day basis by Ministries of Culture and the state. Therefore the areas in which the Ministries of Culture are choosing to operate, the way in which they operate in those areas and the quality of their performance are all of critical importance.

(iv) In the past decade or so in Europe, and in the context of states modernising, the definition or understanding has changed of what culture embraces and also the nature of its role and potential in social, economic and human development. In the Eastern Partnership countries the practical transition to a modernising definition or understanding of culture has been limited. This throws up questions about what the strategic and leadership role of a Ministry of Culture is. In particular it raises the fundamental question of whether the real role of such Ministries should be to concentrate on creating the climate for culture rather than be a direct player in everyday cultural activity.

(v) The area of cultural leadership, and training related to it, seems to be underdeveloped in the countries. Defining what kind of leadership is going to be needed at all levels in the state, independent/NGO and private/commercial sectors and addressing those needs by leadership training which brings the three sectors together seems to be an obvious priority.

(vi) For various reasons, including the leadership issue just mentioned, the cultural sector in the EaP countries is not as dynamic as it might be. Identifying who can produce the ‘green shoots’ and how these individuals, groups and organizations can be better supported is important. So too is capturing 'success stories' and turning them into replicable case studies or experiences which can be shared.
The research has shown that there are some very good initiatives and experiments in the EaP region but they are sometimes little known and therefore not used as active models elsewhere in a country or in other countries tackling similar issues.

(vii) Increasing more awareness of the relevance and potential of the cultural sector in all the countries is important. Advocacy and strategic, responsible lobbying does not seem to be developed in any serious way while culture, even though viewed positively, is not yet really perceived as a cross-cutting issue that can or should be part of other social, human development and economic agendas. Any initiatives or activities that help culture, cultural policy and cultural activity contribute dynamically to modernization and to social and economic policies and agendas should be encouraged.

(viii) There are huge centre-region and urban-rural divides which are serious challenges for the cultural sectors in the countries. Facilitating access to culture, reducing the divides and harnessing culture to modern values and aspirations, especially those of young people, should be given more focus. In the context of the Eastern Partnership Culture Programme any targeted training or capacity-building which focuses on the specific needs of the regions would seem to be a sensible objective.

(ix) Heritage and conservation has understandably been and still is the highest state priority in all the countries and is often related to nation-building and identity formation in these countries. It is likely to remain a very high priority for a long-time to come but there are very evident supply-demand deficits in terms of people qualified in all spheres of restoration and preservation work. This is an area where capacity building which contributes to long-term self-sustainability would be welcomed by the countries.

(x) The high priority focus on heritage and preservation does however raise questions about balance i.e. balancing support for the preservation of the past with support for the creativity of the future. More research is required but the need for the creation of contemporary European-style professional associations which play an important self-help and advocacy role for their sub-sectors and members seems to be evident. The key issue is the question of whether the ‘creative unions’ inherited from the past are the right model for the present and future. It is perhaps an area which could be explored by the Eastern Partnership Culture Programme as there is a diversity of excellent models and practices in EU Member States which could be drawn on and it could be one avenue for increasing professional contact between the Member States and the EaP region.

(xi) In all the countries there are issues around information provision of one kind or another. There are also a few positive examples of good practice. There is no question, for example, that Ministries of Culture are being more open than in the past and in that sense they have changed. The problem however is that with the information revolution brought about by the Internet and the rapid development of social networking, expectations, especially those of younger people, have changed radically. In short the Ministries have changed but perhaps not enough. Support from the Eastern Partnership Culture Programme to help the countries improve their communication and information provision to a common regional standard - aspiring to the best norms of transparency of EU Member States - should be considered.

(xii) While the creativity and the creative economy agenda is little developed in the countries there is a need, and at least in some cases already a generalized interest, in cultural and creative industries (CCIs). This is an area where there is again rich experience in many EU member states and it is a natural area where
the Eastern Partnership Culture Programme could consider engagement. If this path is taken it should however be done with caution and initially with modest practical goals. This is an area where overblown expectations can be created. The EaP countries, although culturally rich, are not in other respects necessarily well-positioned to flourish in certain types of CCI activity. A widespread general suspicion or disdain in the countries of the region for commercial cultural activity or for a culture ‘market’ is also not helpful in this respect.

These themes that have emerged from the research will be further explored in Section 5: ‘Recommendations’.

In recent times, as far as culture, cultural policy and cultural development are concerned some green shoots are beginning to appear in the region while with the benefit of hindsight one can see that in fact substantial progress really has been made since independence, albeit not as much, nor as fast, as everyone wanted and many expected.

Particularly in the last decade one can see, for example, the countries treading a path towards recognised international standards appropriate to their new statehood, although progress varies from one country to another. Their young people, in particular, are beginning to recognize the benefits of modernization and the exciting new opportunities offered by the communications and digital revolutions currently unfolding, of internationalism and globalization, and of exploration of multiple identities and personal self-actualisation. In general, there is a slowly evolving understanding of the potential role and contribution of culture and creativity, in its modern definition, to social, economic and human development agendas and to national, regional and individual development.

All the countries in varying degrees have established their international and European credentials in the period since independence. They have shown that they want to contribute to, and benefit from, what international collaboration and sharing can offer. This has been particularly true in the field of culture. Active membership of UNESCO and the Council of Europe, ratification of relevant conventions of those organisations and introduction of legislation related to culture usually based on good European models have reflected both good intentions and a genuine aspiration to be worthy members of the international and European cultural community.

For reasons already given – a basic struggle for survival in the post-independence period – in the past the signing of a convention sometimes became a goal in its own right, rather than as the starting point for the real goal which is implementation. Similarly, legislation related to culture, which in some of the countries meant quite a large number of new laws, also sometimes suffered from the drafting and passing of the law becoming an end in itself with information, training and other measures relating to its implementation absent. In general, cultural professionals in the Eastern Partnership countries sometimes do not know that cultural legislation relevant to them exists, even where they are supposed to be the implementers. A good legislative framework for the cultural sector is, of course, important but there is a certain futility in continuing to pass laws when they are not actively implemented or are forgotten almost immediately they are ‘introduced’.

The six countries are superficially as different from one another as any group of six countries could be. Ukraine is the biggest country in Europe, while Armenia is very small; Azerbaijan has a booming economy while Moldova struggles and so on. The group is also very diverse ethnically, religiously, linguistically and politically. These differences are very important and have to be taken into account. In the sphere of culture however, and not only in that sphere, there are common important elements where there is great similarity. Much of this similarity comes from history and is of an institutional nature derived from their having been part of the Russian Tsarist Empire and then of the Soviet Union.

Soviet structures, institutional models, planning, financial and administrative systems, not to mention assumptions and ways of thinking, were more or less totally uniform across the Soviet Union. It is as a result of this that the countries are often still facing strikingly similar challenges, problems and frustrations as they each develop their own distinctive paths to the future. That these paths are distinctive is both natural and healthy. The countries have to take into account factors and dimensions of their societies which will in a liberating way shape their evolution and development. Working to a ‘one-size-fits-all’ template designed and imposed from the outside, as happened in the past, is totally inappropriate.
The continuing impact of the Soviet institutional-bureaucratic heritage cannot be exaggerated. It has been a psychological as well as practical barrier to sensible change and reform and to achieving some kind of balanced sustainable development. While not belittling what has been done and achieved since independence in the cultural sphere, in often the most dire circumstances, it could be argued that what has taken place in all the countries has been ‘mutation’, rather than replacement or fundamental reform of the old Soviet institutional-bureaucratic models, systems and practices. This has, of course, often been because of what has been happening at a wider governmental and political level in the countries.

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The three key strategic constraints or dilemmas that have flowed from this Soviet institutional ‘mutation’ rather than genuinely fundamental modernizing reform as far the cultural sphere is concerned are:

- a de facto continuing ‘Soviet’ definition of culture (which itself was rooted in a 19th century conception of ‘high culture’),
- a very weak and unstable independent/NGO cultural sector,
- a very weak, absent or unrecognized private/commercial cultural sector.

The problem with the ‘Soviet’ definition of culture is that it sees culture in rather narrow and non-dynamic terms and implicit in the definition is that ‘high culture’ (i.e. classical music and theatre, opera, ballet and academic fine arts) is ‘real culture’. This then leads to an inevitable understanding of the role of a Ministry of Culture as being to deal with ‘real culture’. In Soviet times this led in turn to a politically-convenient sophisitic position of defining culture as what the Ministry of Culture did, and anything with which the Ministry of Culture did not occupy itself, ipso facto, was not culture!

In the second decade of the 21st century that ‘Soviet’ definition of culture, even in mutated forms, simply fails to understand that culture is dynamic and this in turn is a psychological and practical barrier to harnessing the real nature of culture and its social and individual human developmental and economic potential in a modernizing or modernized country.

This issue of the definition or understanding of the nature of culture in the contemporary world is not an academic question. It is the cornerstone of any progress towards positive change, reform and sustainable cultural development. Its strategic and practical significance is that lingering, albeit fading, perceptions of culture as ‘state culture’ leads to exclusion and creates negative friction and unhelpful boundaries between different components of the cultural sector. That is to say it produces artificial barriers between governmental cultural activity, independent/NGO cultural activity and private/commercial cultural activity and the ‘market’. As mentioned elsewhere in the individual country reports there is in all the countries to a greater or lesser extent, a very undeveloped commercial/private sector cultural dimension and a similarly undeveloped independent/NGO sector.

Taking private sector cultural activity first, in none of the countries are the cultural and creative industries developed in a 21st century sense, while the traditional cultural industries such as publishing and film production are struggling. In these countries the problem is that the lingering understanding of culture as ‘state culture’ plus the post-Soviet discrediting of ‘capitalism’ and ‘biznes’ (private commercial activity) means that many people believe that the market and ‘commercial cultural activity’ are a contradiction in terms, i.e. ‘business’, ‘commercial’, ‘private’, ‘market’ by definition are the opposite of culture. Even where commercial cultural activity is recognized, more often than not that recognition is somewhat distorted, for example in some countries by categorizing and dismissing it as ‘show-business’.

One of the big challenges for all the countries is how to produce a positive and helpful regulatory framework within which the cultural market and a healthy commercial cultural sector can develop, thrive and make a significant contribution to the wider cultural sector and the ‘cultural offer’ available. This is probably best done in the context of looking at ways of supporting directly and indirectly cultural and creative industries (CCIs). This area is
beginning to be discussed as part of national agendas and even occasionally appears in policy documents. There is however only very limited practical action or it being given lip-service not backed up by real conviction and commitment. At the other extreme, there is a danger also of seeing the development of a CCI sector naively as a simple panacea for everything, a little as sponsorship is sometimes also naively seen.

The potential positive impact of the private/commercial sector and the ‘market’ is particularly important in the EaP countries. In most of the countries some of the major positive changes are coming directly and indirectly from the private sector. To take the example of Ukraine, the opening of the PinchukArtCentre not only overnight found and galvanized new young audiences for contemporary art but also set international gallery standards locally that are now the benchmark for any new visual arts projects. We should not be surprised that the private sector in these countries is capable of bringing change to the cultural sector. It should be remembered, for example, that it was the private sector which began to sweep away the infamous ‘Soviet shopping experience’ and introduce new standards of customer service which have nurtured new expectations and behaviours in the wider society of these countries. Staying with the example of Ukraine, the PinchukArtCentre is by no means the only example of the private sector influencing state standards and public expectations. Another Ukrainian example is the heritage restoration projects and recent ‘cultural innovators programme’ of the Foundation for Development of Ukraine funded by oligarch Rinat Akhmetov. In Armenia, in the capital Yerevan, the cultural infrastructure has been renewed and transformed by private, foreign investment often directly introducing good commercial models or being influenced by them. Even in Belarus, the leading contemporary art gallery, which is setting the standards which will introduce positive change more widely there, is set up as a commercial structure.

In the case of the undeveloped independent/NGO sector, it is a case of another wheel missing from the car, if one can use that analogy. For reasons also to do with the ‘Soviet’ definition of culture, the idea of an independent cultural sector was a difficult concept. In the early independence period when an attempt was made, normally with very visible ‘western’ support and funding, of grafting an independent/NGO sector on to ‘Soviet’ or mutated ‘Soviet’ structures and systems, it was generally a failure. Just as there is no real market and healthy private sector/commercial cultural component in the six countries, so there is still, relatively speaking, no healthy, thriving independent/NGO component, although there may be small variations between the countries.

While there is plenty of evidence of success produced by NGOs and independent operators in the cultural sector in the countries, it is important not to be blind, for ideological or preconceived reasons, to the structural failure and strategic shortcomings of NGO development in former Soviet countries. The economic conditions of the 1990s, unrealistic expectations and often a situation of western funding ‘chasing’ projects led to many distortions. NGOs were often set up for one-off projects and the NGO itself could not achieve any kind of institutional growth or stability. Those involved in them all had to live yet sometimes external funding did not make provision for that with project funds sometimes as a result evaporating to meet living expenses and running costs. In some cases setting up an NGO and living off foreign grants became a career move. This created a local image, which the research has shown is still very strong, of ‘grant-sharks’ or ‘grant-eaters’ where it was perceived that little or nothing of lasting cultural or social benefit was achieved from some NGOs and their projects.

It is not clear to what extent the lessons of the past in relation to the problems of stimulating an independent/NGO sector have been learnt. It is possible that the model of a tiny NGO working on a small project totally independent from the state in the early years of independence was simply not the right model for that time. National cultural policy did not address the problems of the independent sector nor come up with alternative models. Often there was simply hostility between state and NGO structures, a situation which still sometimes prevails. In some of the countries, the only serious cultural NGOs now functioning properly are those that have been used for what is seen as a mainstream ‘state-funded’
activity or that have been set up as a “GONGO” (Government-owned NGO) for a particular purpose.

Against this sometimes-disheartening picture of the independent/NGO cultural sector must also be set the real achievements, which are many. To take a specific example, the two most important annual cultural events in Armenia, the Golden Apricot International Film Festival and the HayFest International Performing Arts Festival both have an impeccable independent/NGO pedigree even though they are now major recipients of state-funding. In Georgia the independent/NGO sector has produced ‘jewels’ and ‘small miracles’ even in the darkest days since independence. In all the countries the impact of the Soros ‘Open Society’ programmes of encouragement, support and funding to the independent sector has been very positive and impressive. In short there is no question about the need, value and future potential of the independent cultural sector in any of the countries but there are key strategic and practical policy issues to be addressed in this area. This presupposes also a more ambitious and fresh approach to the slowly improving relationship between the Ministries of Culture and the independent/NGO sector in the countries.

An analogy was mentioned above of a car with wheels missing and this in some ways may describe the current strategic dilemma of the Ministries of Culture. While this is serious it is also, as mentioned earlier, at a time when they have started to move from a very difficult and bleak past characterized by ‘survival’ into a new period where new green shoots are appearing and light can be seen at the end of the proverbial tunnel. There are many obvious differences between being an independent country in the second decade of the 21st century and the Soviet past. Positive or negative, one is that a Ministry of Culture in a modernizing or modernized state cannot deliver sustained cultural development alone. Another is that it cannot alone deliver on any of the other wider agendas of society - social and individual human developmental and economic - to which culture is expected to contribute in modern European societies.

This issue of the need for partnership between the state, the independent and the market/commercial cultural sectors is central to any modernizing or modernized state. It is also essential for the creation of a rich cultural offer and a healthy and diverse ‘market’ for culture. Each of those three ‘sectors’ (state, independent and commercial - in fact they are one) have a direct and vital vested interest in the strength and health of the others. This can only be achieved through inclusive, jointly formulated national policy initiatives which have as their starting point a wide but clear understanding of culture and the role of culture in modernization, reform and sustainability. It will normally be the role of a Ministry of Culture to provide leadership and coordinate this and to make a transition to what can very succinctly be captured in an English preposition, the move from being a Ministry of Culture to being a Ministry for Culture.

If we stay with the car analogy, the fourth wheel (in addition to those of the government, independent/NGO and market/private sector/commercial ‘wheels’), is the regions and regional cultural policy. It should be noted that in this context, one is using the word “region” to refer to the administrative-territorial units of the Eastern Partnership countries. Accordingly, the adjective “regional” is synonymous with the word “local.” In all of the countries there are extremely significant developmental divides, including in the cultural sector, between the capital and the regions.

All of the countries face problems in addressing the issues that this divide throws up, not least issues of decentralization while maintaining professional standards of a national level. In some areas one can see the new communications technologies, digitalization and the Internet providing useful tools especially in relation to certain types of access issue. Amongst other things, the research has shown the absolutely dramatic increase in the countries of the region of Internet access in the last 2-3 years. In some cases Internet access is numerically now the equivalent of half the country’s population. The need for serious development of regional cultural policy integrated into wider social and economic policy is evident not only in a large country like Ukraine, where, incidentally, some work on cultural policy in a regional context is
currently being undertaken, but also in the smaller countries such as Moldova where some useful training of regional cultural directors has taken place.

With constraints of time and budget, as well as with generally limited reliable sources of information on how things are really operating, the research has only in a limited way been able to look at cultural practice taking place at the local government and municipal level. Although this regional/local government dimension would not in most European countries be seen as a potential part of the ‘independent sector’, in the EaP countries, because of the past dominance of centralized state cultural provision and the hegemony of the Ministries of Culture, local government or municipality activity sometimes can act as if part of an independent sector. One example is the Council of Europe ‘Kyiv Initiative’ pilot project on Rehabilitation of Cultural Heritage in Historic Towns launched with EU support in which it is city authorities and, through them, local communities who are driving much of the activity and its goals. The role of regional and local government and municipalities in developing the independent/NGO sector is no less important than that of the central policy-makers. A similar point can be made in relation to private/commercial sector development.

Culture does not operate in a vacuum and is not immune from the wider context of society. The research has in this respect intentionally highlighted certain contextual issues, such as the influence of corruption in the wider society on the cultural sector. Even when there is no direct corruption, there are still transparency issues. These range from venial carelessness, such as simply not putting available information in an easily accessible form on a website, to possibly deliberate holding back of information to which in modern, open societies people increasingly expect access.

Because the independent/NGO and the market/private/commercial sectors are weak, the importance of the state bodies, particularly the Ministries of Culture, is greater than would perhaps normally be the case. The research shows that the Ministries cannot alone deliver what is required by a modernising society in terms of cultural development and realisation of the potential of culture. The other side of that coin, however, is that they are also ultimately in control of the fate of national cultural development both by what they do and by what they do not do.

The picture that ultimately arises from the research is that the first purpose of Ministries of Culture in the next phase of development - now that the ‘survival’ phase is becoming part of the past – should be to concentrate on creating a positive and supportive ‘climate’ for culture. This means, taking the earlier analogy again, making sure the four wheels are on the car, that those wheels are ‘road-worthy’ and providing the consultation, coordination and leadership so all parts of the cultural sector agree on which direction is being taken and have confidence in the driving. The Ministries of Culture alone will not be able to ensure that the four wheels on the car are functioning healthily: transversal cooperation is required at governmental level between all governmental bodies that can have an impact on culture, for example those responsible for economy, education, youth, sport, tourism, urban development, finance and tax-related issues.

The need for strategic direction and leadership is apparent but as yet there is disappointingly limited evidence of joined-up strategic working in the cultural sector in most of the countries. Lack of joined-up working to produce strategic direction and create appropriate leadership itself influences the degree to which the cultural sector can engage in joined-up strategic working with other sectors to address common national and local needs, issues and problems.
4. Major Findings of the RMCBU Research Visits

Starting from October 2011, the RMCBU made a series of research visits to Azerbaijan, Georgia, Armenia, Belarus, Moldova and Ukraine. The purpose of the visits was to establish contacts with key Programme stakeholders in each country and launch the process of identification of specific policy areas to be reinforced at the national and regional level. The field work included round-table discussions with key government and civil society stakeholders, meetings with key actors in the culture sector, presentations of the Programme and collection of background data for the base line studies on cultural policies in the Eastern Partnership countries. The results of the visits and subsequent studies formed the basis for proposals for capacity-building activities in identified priority areas to be implemented by the RMCBU in the period up to March 2015.

The visits were undertaken by the team of experts comprising Mr. Luciano Gloor, Team Leader, Ms. Tetiana Biletska, Capacity Building Expert, Ms. Elena Palivoda, Information and Communication Manager, and Ms. Oksana Muzychuk, Project and Monitoring Manager.

The three to five day stays in each country allowed the RMCBU team an opportunity to meet a total of around 450-500 cultural sector representatives from all the partner countries, 40 to 90 persons in each country.

Our interlocutors in all the six countries demonstrated a high level of interest in the EaP Culture Programme in general, and in the RMCBU research visits in particular. The Ministries of Culture of Georgia, Armenia and Moldova were especially supportive. National authorities of Armenia, Azerbaijan, Georgia, Moldova and Ukraine clearly expressed and stressed their aspirations for European integration and interest in the EaP Culture Programme in this respect. The Ministry of Culture of Belarus stressed the importance of viewing Belorussian culture as a part of the world and European culture. It expressed its appreciation of EC activities in the cultural domain and development of international cultural cooperation and its hope for deeper interaction with the EC in this area.

The principal event of each research visit was a one-day round-table organized by the RMCBU in cooperation with the local Ministry of Culture and EU Delegation. The round-tables provided an opportunity to share information about the Eastern Partnership Culture Programme and to discuss needs and priorities for reforming and reinforcing the cultural sector. Regional and national policy initiatives and different EU and international programmes related to such areas as culture, education and human development were also addressed during discussions.

Each round table gathered up to 30-40 participants, including representatives from the Ministries of Culture and Foreign Affairs, other national and local authorities responsible for culture, EU Delegations, NGOs, research and academic institutions, related projects and initiatives, national and local museums, art galleries, foundations, professional associations and unions, cultural industries and the private sector.

In Armenia, Moldova and Ukraine, the round-tables were co-chaired by the Deputy Ministers of Culture. In the other countries they were co-chaired by a Head of Department of the Ministry of Culture. All countries assessed the round-tables on cultural policy issues as an efficient instrument for launching and further developing a public-private partnership in the field of culture reform.

Assessing the main outcomes of the visits to the EaP countries, we would like to stress that apart from preparing the ground for further research work, some other results were also achieved. In particular, the base for building a networking platform for culture sector professionals at the national and regional level was prepared and assistance on launching/reinforcing public-private dialogue on cultural policy issues in the countries was provided.
It is important to mention here that the expectations of the EaP Culture Programme’s stakeholders in all the partner countries were far beyond the actual capacity for activity planned for the RMCBU and the entire Programme in its present first phase. To take one example, there was an expectation that there would be new calls for proposals for grants within the Programme in the near future as well as of other kinds of possible financial support. There was also anticipation of a much more comprehensive capacity-building programme than is envisaged, as well as expectation of targeted support for specific cultural sub-domains way beyond the foreseen number of seminars and workshops under the Programme.

In the opinion of the national stakeholders in the partner countries, priority needs for capacity building in the regional cultural sector are as follows:

- Elaboration of sectoral/sub-sectoral strategies, and implementation of appropriate legal reforms.
- Re-definition of the role and functions of all stakeholder groups, ministries of culture included, within the process of cultural policy development and implementation:
  - Introduction of best practices with regard to the structure and functions of ministries of culture and bodies of public administration dealing with culture;
  - Specifically, decentralization of functions, management, activities and funds from national authorities to local authorities as well as to public and private cultural institutions.
- Development of public/private and local/national/regional/intraregional cultural cooperation as well as networking and cooperation of policy makers.
- Advocacy measures to support the role of culture for social, human and economic development:
  - Provision of instruments (argument base),
  - Raising awareness of the role of culture in general development of society,
  - Development of interdepartmental cooperation in the EaP countries.
- Improvement of framework conditions for art/culture and related activities to increase sustainability and, specifically addressing:
  - Registration procedures for NGOs and cultural institutions,
  - Administrative procedures for public cultural institutions,
  - Commercial / non-commercial activities of cultural institutions,
  - Policies stimulating private investment,
  - Tax incentives for cultural activities (VAT, income tax, etc.),
  - IPR management issues.
- Education reform:
  - Modernisation of cultural education,
  - Wider inclusion of art/cultural elements into the general education system/process.

With regard to all the above topics such measures are expected to be undertaken as expert support; expert assessment of strategies / laws; consultancy in development matters; support for implementation of international conventions (e.g. the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions); and provision of information on tools and best practices of law enforcement.

Providing capacity-building, training and skills development for the region's cultural professionals representing all culture sub-sectors is also desired. The following topics are expected to be addressed:

- Strategy development / reform of cultural legislation,
- Advocacy / fundraising and sponsorship / development of partnerships,
- Research / marketing / audience development,
- Project management and business planning / strategic management and leadership skills,
- Development of indicators to assess cultural sector development,
- Development of project concepts and preparation of applications for grants,
Communications and public relations,
New skills for culture in a digitalised world,
Efficient models for the promotion of culture.

The stakeholders also consider important improving specific skills for cultural sub-sectors/areas or instruments:

- Tangible historic and architectural heritage (protection / preservation / management / inclusion into local development),
- Museums,
- Libraries,
- Cinema,
- Community Cultural Centres (former Houses of Culture, especially in rural areas).

Many respondents stressed the key importance of coordination of efforts of all donors active in the region who are involved in policy reform and capacity building. This would help avoid duplication of activities and help focus all resources, tools and facilities on support for cultural reforms and the achieving of tangible results. Of many donors supporting cultural cooperation and capacity building programmes/projects in the EaP countries, we would like to mention the following institutions/organizations that have been the most active at the regional level in the context of the EaP Culture Programme objectives:

- UNESCO, including activities related to the work of:
  o UNESCO World Heritage Committee,
  o Intergovernmental Committee for the Protection and Promotion of the Diversity of Cultural Expressions.

- Council of Europe:
  o Policy projects, including past cultural policy reviews
  o Kyiv Initiative Regional Programme involving five Eastern Partnership countries and particularly its Pilot Project on Rehabilitation of Cultural Heritage of Historic Towns (PP2),
  o Training programmes for cultural/alternative tourism.

- European Cultural Foundation (Moldova, Belarus and Ukraine for the moment, possible activities in the South Caucasus countries later on):
  o Tandem Cultural Managers Exchange & Placement Programme Ukraine – EU – Moldova,
  o Culture Transformation Network in Ukraine (capacity building training for NGOs and local cultural administrators),
  o Cultural Change-Makers Network in Belarus.

- Soros Foundation / Open Society Institute / International Renaissance Foundation:
  o Support for civil society institutional development,
  o Common projects with the European Cultural Foundation in Moldova,
  o Culture for Human Development in Ukraine.

- British Council and Goethe-Institut (including common projects):
  o Cultural leadership and capacity building / professional training, as well as programmes supporting specific sub-sectors of culture.

- French Institute and Alliance française
- Polish Institute
- Eurasia Foundation

National stakeholders recognised that the EaP countries were often in a common situation and as a result are experiencing similar problems. While they are interested in knowing more of the best practices and experience of neighbouring countries and EU Member States, they also stressed the necessity to pay attention to national differences and peculiarities.
Participants at the RMCBU round-tables and working meetings in the six countries also expressed their views on the most important factors and preconditions for both the success of the Programme and for developing a sense of ownership by national stakeholders. The following issues were mentioned by practically all the partner countries:

- Providing as much transparency as possible in relation to the Programme’s opportunities and decision-making, including selection of participants to the RMCBU events.

- Involving national experts into RMCBU capacity building activities.

- Taking into account the experience and lessons learnt as well as building on the results of already available programmes of regional cooperation e.g.:
  - Kyiv Initiative Regional Programme involving five Eastern Partnership countries,
  - Programmes and Projects of the European Cultural Foundation.

- Developing results-based and target-oriented cooperation under the Eastern Partnership by addressing more practical aspects alongside strategic issues and combining policy dialogue and expert support with realization of concrete projects.

- Providing training of trainers.

- Paying special attention to heritage-related issues (preservation and protection, modern management and usage for local development, etc.)

- Paying attention to national specifics of each partner country including such questions as:
  - Art and culture development for national identity formation in the EaP countries,
  - Language issues and protection/promotion of national cultural products.
5. Recommendations

Themes and issues that have been emerging from the research have been outlined above in Sections 2-4. One overarching theme is that the EaP Culture Programme is coinciding with a new period for countries in the region when change is particularly appropriate. The post-independence period of cultural sector ‘survival’ saw achievements in all the Eastern Partnership countries in severely difficult conditions but the policies and thinking of that period, which is already becoming part of the past, are not appropriate for the future.

The needs of the countries of the region related to culture and cultural development are considerable. Realism is needed in identifying what the Eastern Partnership Culture Programme can achieve. Certain important factors should be taken into account. One obvious factor is that there is a rich diversity of practical experience in the EU Member States related to culture and cultural development on which the countries of the EaP region could draw in a mutually beneficial cultural context. An equally obvious factor is that all the Eastern Partnership countries have a lot to offer in the other direction.

There are of course real challenges. The structural weaknesses of the EaP countries include

- a weak conception of culture as a potentially dynamic contributor to social, human and economic development and to the wider modernization process;
- a weak private/commercial cultural sector and ‘cultural market’;
- a weak, undeveloped independent sector;
- underdeveloped leadership in various parts of the cultural sector;
- absence of shared agendas between the various parts of the cultural sector;
- problems of semi-reform and ‘mutation’ rather than genuine reform and change;
- information and transparency issues;
- capital-regions and urban-rural divides which could produce serious social cohesion problems in the future;
- cultural heritage and preservation priorities and needs for which there is inadequate supply of trained personnel;
- a tendency to neglect contemporary cultural production or give it low priority;
- no real development of the creativity, creative economy or cultural and creative industries agendas;
- absence of effective professional membership associations promoting various sub-sectors and their members and generally developing the market and enriching the environment in which they create and produce.

In this context it is recommended that the Eastern Partnership Culture Programme and its partners in the EaP countries focus on the following:

(i) Use of the approach adopted by the Base-line Reports as an assessment instrument. Authorities and stakeholders should discuss the methodology and its development with a view to taking ownership of it and adopt it for regular monitoring of the progress of the culture sector and its operating environment, along with eventual adoption of the ESSnet-Culture and UNESCO FCS statistical frameworks.

(ii) Seeing and using capacity building activities as part of a process of change. If the capacity-building exercise is to bring sustainable results it is essential that all stakeholders (central government, regional/local government, independent/NGO and private/commercial) have to be involved and jointly define and understand what is trying to be achieved. Capacity building, when successful, leads to change of practices and attitudes. A holistic approach is essential for success.

(iii) Recognition that any process of change in the cultural sector is profoundly connected to a joint and fresh definition/redefinition of culture in a modernizing context. This in turn requires redefinition of the roles, responsibilities and duties
of individual stakeholder groups within the sector: the state authorities / the public culture institutions / the private/commercial culture sector & institutions / independent/NGO sector & creators.

(iv) Cultural leadership development, training and capacity-building for the state, private and independent sectors in the context of (a) identifying and promoting common strategic interests and (b) focusing on improvement of the climate and context for broad-based national cultural development.

(v) Practical support in the area of communication and information provision with a view to the countries of the region achieving common standards that meet best European good practice and transparency standards.

(vi) The need to balance preservation of the past with contemporary creation for the future should also become a focus. This is probably best achieved through a programme capable of facilitating the sharing of experience between relevant successful professional cultural membership associations in EU Member States with the countries of the region. It could focus on issues related to the ‘creative unions’ inherited from Soviet times and the needs of post-independence creators and artists which have in many cases never been satisfactorily addressed.

(vii) Decentralization is one of the core issues linked to the redefining of roles especially of local/provincial authorities and public cultural institutions. There are very evident needs related to regional development and centre-region relationships. Development of regional cultural policies and strategies, and capacity-building and training at the regional level could be usefully developed as a priority area. The training initiative in this area in Moldova and Ukraine developed by the Soros Open Society (in Moldova) and the European Cultural Foundation (in both countries) might serve as one possible model.

(viii) CCI (cultural and creative industries) sector development is a new, emerging need of the countries and increasingly discussed throughout the region. Development of realistic, carefully selected initiatives to contribute to the nurturing of this sector would be helpful and it is an area where the very rich and varied experience in many EU Member States can be shared.

(ix) Given the very high priority accorded to cultural heritage and preservation issues in the countries of the region and quite evident insufficiency in trained specialist provision, a capacity-building effort to contribute to long-term sustainability in this area would be welcomed locally but should take into account any other existing initiatives and the differing needs in the individual countries.

In the context of this very extensive research and information gathering exercise, where the focus has been to try to distil objective needs rather than collect subjective impressions, it is perhaps worth drawing attention to two factors which have not always made this easy. The first is that, with worthy exceptions, there is very limited serious cultural policy and cultural development research going on in the countries of the region. This needs to be addressed. Secondly, while ‘national culture’ is often patriotically ‘valued’, its social, economic and human development potential is often not properly recognized. As a result it is rarely integrated properly into policies related of those areas and nor is it usually a pragmatic component of a wider national policy.

Finally, in general, in all the countries there is a need for reconciliation of differing views on cultural development, cultural policy and cultural practice through discussion, agenda-setting, reflection and compromise. During the research the difference in views within countries was striking and it was rare to find consensus, for example, between state players and non-state players. Viewed from outside, the need to try to establish common and shared agendas seems obvious. This has to take place however in an inclusive and open way between the different
stakeholders and cultural actors. Such engagement can lead to mutually self-interested action for the common good. The degree to which this is perhaps already happening or will happen in the countries of the EaP region may not be entirely clear, not least because of the sometimes differing perspectives of state and non-state cultural players respectively. Working together, openness and inclusiveness are central to the values and objectives of EU engagement with the EaP countries through the Eastern Partnership Culture Programme.
Lists of sources

   http://kulturaenter.pl/pliki/pdf/Bialorus_E.pdf

2. Compendium of Cultural Policies and Trends in Europe:
   http://www.coe.int/t/dg4/cultureheritage/culture/Compendium/default_en.asp
   http://www.culturalpolicies.net/web/countries.php

3. Culture and Development. 20 Years after the Fall of Communism in Europe:
   http://www.coe.int/t/dg4/cultureheritage/CWE/Kultura_Rozwój.pdf


7. East European Performing Arts Platform:
   http://www.eepap.org/web/english/eepap.pl

   Country reviews: http://www.coe.int/t/dg4/cultureheritage/culture/Reviews/
   http://www.coe.int/t/dg4/cultureheritage/culture/Reviews/list_EN.asp
   Transversal and sectorial reviews:
   http://www.coe.int/t/dg4/cultureheritage/culture/Reviews/transversal_en.asp


    http://www.coe.int/t/dg4/cultureheritage/cooperation/Kyiv/CPCE/art_en.asp


Annex 1. Diagram on Analytical Criteria for Comparative Studies and Diagnostics on Cultural Policy of the EaP Countries

Four wheels to run:
- Creation/Production
- Provision/Transmission/Dissemination
- Access
- Participation

Road system on which to run:
- Climate/Context for Culture
### Annex 2. Indicators for Monitoring of the Function of Culture

<table>
<thead>
<tr>
<th>AREA / ISSUE</th>
<th>INDICATORS</th>
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| **1.1 Context/Climate - Legislation, tax, registration and employment issues affecting culture** | Degree to which these issues are supporting the development of culture and creativity.  
  a. The degree to which national legislation (e.g. as perceived by people in the cultural sector), directly inhibits cultural development or the health of the cultural sector and the extent to which this is a serious issue.  
  b. If national legislation is affecting the development of culture and creativity, whether the legislation is culture-specific or general.  
  c. Examples of cultural legislation, which seem to be working well?  
  d. New or revised legislation relating to culture planned to address perceived problems.  
  e. The degree to which tax regulations or issues are inhibiting cultural development or the health of the cultural sector (e.g. as perceived by people in the cultural sector).  
  f. Length of time, number of stages, cost and degree of complication in the process of registering an NGO or commercial cultural entity. |
| **1.2 Context/Climate - Transparency and corruption** | Latest ranking on Transparency International’s Index and compared with ranking in last two years  
  Any other reliable source illustrative of the existence of direct corruption or wilful lack of transparency in the cultural sector or of the impact of general corruption on the cultural sector |
| **1.3 Context/Climate - Provision and dissemination of official and public information** | a. The MoC website contains all current cultural legislation or easy link to it.  
  b. The degree to which the MoC website contains helpful information about the availability of advice, support or funding for cultural organisations and/or individuals.  
  c. Whether or not the MoC website contains helpful information about the support or funding they provided in the previous year or period for cultural organisations and/or individuals?  
  d. Whether or not the MoC website contains reasonably detailed information about its budget, allocations and actual spending.  
  e. If any of a. to d. are not on the MoC website, whether or not they are easily available on another known website or are reasonably easily accessible in some kind of print format.  
  f. Level of use of the MoC website i.e. web statistics e.g. hits, visitors.  
  g. Level of cross-referencing on the MoC website to the websites of other ministries or central or local government bodies related to education, youth, licensing etc relevant to culture, integrated planning and cultural activity. |

2 The indicators correspond to the structure of section 3: Research Survey of the Analytical Base-line Reports on the Culture Sector and Cultural Policy of the six Eastern Partnership Countries.
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<tr>
<th>AREA / ISSUE</th>
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| **1.4 Context/Climate - Integration of Cultural Policies in Other Policies and Strategies** | a. Availability of policy documents or other tangible evidence.  
b. Examples of inter-ministerial or inter-agency joint activity.  
c. Evidence of regular formal or informal planning, consultation or similar meetings. |
| **1.5 Context/Climate - Accountability and Openness in Practice** | a. Evidence of formal and regular consultation and briefing meetings with (a) cultural sector representatives (b) press and media representatives.  
b. Evidence of regular provision of general policy, budgetary and activity information available to an interested public.  
c. Public availability of business plans and targets of authorities responsible for culture and the cultural sector. |
| **1.6 Context/Climate - Contribution of the Cultural Sector** | a. Evidence of, or perception of cultural sector professionals, of level of awareness of the central and local authorities of the potential role of culture and cultural activity in contributing to social and economic development, social cohesion, conflict resolution and inter-cultural dialogue  
b. Availability and quality of statistics, research and knowledge related to this area. |
| **1.7 Context/Climate - Role of the Independent and NGO Sector** | a. Perception of (i) the importance and (ii) the potential of the NGO cultural sector by (i) central authorities and (ii) local authorities.  
b. Perception of importance and potential of NGO cultural sector by cultural sector professionals.  
c. Number of registered ‘cultural’ NGOs.  
d. Number of active registered ‘cultural’ NGOs.  
e. Number of ‘cultural’ NGOs or independent not-for-profit cultural organisations employing over 15 people. |
| **1.8 Context/Climate - Role of the Private and Commercial Sector** | a. Perception of the (i) importance and (ii) potential of the commercial cultural sector by (i) the central authorities, (ii) local authorities (iii) commercial cultural sector professionals and (iv) non-commercial sector professionals.  
b. Number of registered businesses classified as being part of the cultural sector or use of any relevant statistics on commercial cultural activity.  
c. Financial turnover of the commercial cultural sector if available from any official statistics or serious sources.  
d. Number of commercial cultural organisations and companies employing more than 50 people. |
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<th>AREA / ISSUE</th>
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| 1.9 Context/Climate - Local Press, Media, Internet, and Specialist Publication interest in Culture and Cultural Issues | a. The number of specialist cultural publications and their readership or print-runs.  
b. Number of important and useful 'cultural websites' relevant to cultural sector professionals.  
c. Available illustrative statistics of level of use of such websites e.g. hits, visitors etc  
d. Level of local press and media coverage of cultural events and debates taken from a typical week (e.g. number of articles and listings in main daily and weekly newspapers/magazines; number of media mentions, interviews or programmes related to cultural events).  
e. Perception of cultural sector professionals or other evidence of whether local press, media, Internet and specialist publication interest in culture and cultural issues has in the last two years grown, declined or stayed the same. |
| 1.10 Context/Climate - Urban-Rural Differences related to Culture, Cultural Provision and Cultural Access | Evidence (e.g. policy statements, ministerial speeches, serious press and media coverage) of the degree of importance or priority attributed to this area by the national authorities. |
| 1.11 Context/Climate – Language Issues                                       | The dynamics of changes of the current status compared with the situation two years before (positive/negative).                                                                                           |
| 2.1 Creation/Production and Preservation/Restoration - Relative importance given in national cultural policy and practice (e.g. funding) to contemporary cultural creation | Evidence of official interest in and support to contemporary artists, creators and producers in terms of policy-related documents, budget allocations, policy statements and ministerial references (e.g. mention in speeches). |
| 2.2 Creation/Production and Preservation/Restoration - Description of the environment in which the different types of cultural and artistic creation/production take place. | a. Concrete illustrative positive and negative examples of official support or the lack of it  
b. Using a scale of Very Supportive/Supportive/Neither Supportive Nor Negative/Difficult/Hostile), perception of representative practitioners of their creative and working environment. |
| 2.3 Creation/Production and Preservation/Restoration – Creativity            | a. Policy documents, statements or official pronouncements on the subject of Creativity or the concept of 'Creative Economy'  
b. Perception of cultural sector professionals of media, press or specialist journals or forums coverage of creativity as a subject i.e. High Interest/Some Serious Interest/Little Interest/No Interest. |
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<tr>
<th>AREA / ISSUE</th>
<th>INDICATORS</th>
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</table>
| **2.4 Creation/Production and Preservation/Restoration – Heritage** | a. Current main issues related to heritage identified (i) by the official authorities e.g. MoC or municipal authorities. (ii) from the point of view of working-level specialists? (iii) from the point of view of civil society/community group and communities, including minorities.  
   b. Level of civil society and/or community group involvement in any heritage activity officially or unofficially using any available relevant evidence (number of registered or known groups/societies, number of projects/sites, existence of relevant newsletters, websites etc.) |
| **2.5 Creation/Production and Preservation/Restoration – Restoration resources and capacities** | a. Number, type, and output of training or professional educational institutions and provision for museum and heritage restorers.  
   b. The degree to which supply of trained restorers meets the demand for them as perceived by a small but representative sample of relevant people (ministry officials, museum directors, heritage planners).  
   c. The degree to which the training of restorers (e.g. quality of training, availability of training) is an area of interest or concern to any of the interested parties (i.e. the MoC, museum directors, heritage planners). |
| **2.6 Creation/Production and Preservation/Restoration - UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions** | a. Level of awareness (assessed by limited questionnaire/interview method of a small representative sample of relevant cultural planners and senior cultural practitioners in your country?  
   b. Examples given by the MoC of where their signing of the Convention has led to them taking action in a way which they otherwise would not have done.  
   c. Number/level of mentions of the Convention in official policy documents or statements. |
| **3.1 Cultural Provision/Research/Professional Training and Transmission/Dissemination/Connectivity/Digitalisation - General Environment** | a. Number, type, size and listing of any institutions, organisations etc involved in arts research.  
   b. Perception of the level of cultural and arts criticism and debate by younger cultural professionals (under 35) through limited but representative interview method. |
   b. Number of known international links in this area e.g. through Erasmus-type links. |
<table>
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<tr>
<th>AREA / ISSUE</th>
<th>INDICATORS</th>
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| **3.3 Cultural Provision/Research/Professional Training and Transmission/Dissemination/Connectivity/Digitalisation – Internet Use and Connectivity** | a. Any available statistics related to Internet connectivity and use.  
b. The costs in relation to local income levels of being connected (i) at home and (ii) by using an Internet café.  
c. Any available statistics or information showing the rate of growth in connectivity.  
d. Any statistics, information or anecdotal evidence related to any ‘digital divide’ (e.g. rich-poor or urban-rural difference).  
e. Any available statistics, estimates or research on the use of the Internet in the cultural sphere and trends. |
| **3.4 Cultural Provision/Research/Professional Training and Transmission/Dissemination/Connectivity/Digitalisation – Digitalisation Projects** | Number and illustrative listing of significant digitalization projects taking place with official support (e.g. the creation of a national electronic library, the digitalization of the collections of a national museum, virtual exhibitions using national collections or archives and so on). |
| **4.1 Access and Education – Access** | a. Any illustrative evidence of any policy provision or discussion at an official level related to any aspect of access to culture (e.g. about cultural rights, about ticket and entry costs to cultural and arts events etc).  
b. List of the main issues related to access to cultural and arts provision as perceived by a small representative sample of cultural professionals to cultural and arts provision. Such issues might include lack of provision, cost, lack of interest, poor marketing, urban-rural divide issues, inappropriate programming at the main venues, unhelpful opening hours etc). |
| **4.2 Access and Education – Education** | a. Evidence of some form of arts education as part of the core school curriculum.  
b. Examples of any types of arts activity provided within a typical school context. |
| **5.1 Participation and Audience Development – Participation Statistics** | a. Available statistics related to participation in arts and culture of any type ranging from theatre or cinema attendance to the number of cultural clubs etc  
b. Evidence or examples of trends related to participation e.g. observable growth and decline in attendance and participation in different activities of the cultural sectors. |
| **5.2 Participation and Audience Development – Audience Development** | a. Statistics or examples related to audience development and outreach programmes e.g. as part of the core work of theatres, museums, festivals and so on which also given some insight into how developed this activity is. |

This report was prepared by Ms. Svitlana Pakhlova, Senior Researcher of the Ukrainian Centre for Cultural Studies of the Ministry of Culture of Ukraine, who also provided quantitative and qualitative analysis of questionnaires collected by the RMCBU from the respondents representing the cultural sectors of the EaP countries.

The invitation to contribute to the research activities of the Eastern Partnership Culture Programme by answering the on-line questionnaire was sent to participants of round-table discussions and other national stakeholders of the programme following the research visits to the six EaP countries in the period December 2011 – March 2012. The RMCBU contacted in total about 450 respondents from the six countries. One hundred of the received responses were included into the report. The responses were distributed by countries as follows: Armenia – 12, Azerbaijan – 10, Belarus – 10, Georgia – 13, Moldova – 11, Ukraine – 44.

A low level of response to questionnaires among national stakeholders was obviously caused by the period of seasonal holidays in the EaP countries and presumably by such factors as the lack of tradition of active use of modern technology and problems with regular access to the Internet.

As the number of respondents from Armenia, Azerbaijan, Belarus, Georgia, and Moldova who contributed to the survey was not sufficient to make a basis for the analytical research, the survey results from these countries have been included for information purposes only while in the case of Ukraine and the regional level the results do feed relevant reports.

Summary

The SWOT assessment of priority needs of the cultural field considers opinions of all national respondents from the six partner countries (Armenia, Azerbaijan, Georgia, Belarus, Republic of Moldova and Ukraine). It is a sector-based context analysis of main threats (or challenges), current strengths (advantages or positive characteristics), weaknesses (or problems), actual or upcoming opportunities for cultural sector together with main priorities and other vectors of cultural policy. The analysis also includes an evaluation of priority needs and the main components of national cultural policy and of the legislative framework in each country.

The most important point is that respondents from Ukraine were very active and presented a wide range of cultural policy needs and views on the current status of the cultural sector. The index of participation of respondents from Ukraine in the questionnaire survey was about 45%.

The following SWOT matrix indicates all factors mentioned by respondents from the six countries that impact the on the cultural sector.
<table>
<thead>
<tr>
<th>Location of Factor</th>
<th>TYPE OF FACTOR</th>
<th>Favourable</th>
<th>Unfavourable</th>
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</thead>
<tbody>
<tr>
<td><strong>Internal</strong></td>
<td>Strengths</td>
<td></td>
<td>Weaknesses</td>
</tr>
<tr>
<td>1. Strengthening</td>
<td></td>
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<td>1. Lack of</td>
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<tr>
<td>of partnerships</td>
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<td></td>
<td>partnership</td>
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<tr>
<td>and cultural</td>
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<td>and exchange</td>
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<tr>
<td>dialogue between</td>
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<td>of experience</td>
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<tr>
<td>all sectors and</td>
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<td>at all levels</td>
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<tr>
<td>actors, including</td>
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<td>(36%)</td>
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<td>through project</td>
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<td>2. Lack of</td>
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<td>activities and</td>
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<td>comprehensive</td>
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<td>international</td>
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<td></td>
<td>policy based</td>
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<tr>
<td>cooperation (44%)</td>
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<td></td>
<td>on democracy</td>
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<tr>
<td>2. Personal</td>
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<td>and cultural</td>
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<td>professional</td>
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<td>rights and</td>
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<tr>
<td>experience</td>
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<td>approaches to</td>
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<tr>
<td>and knowledge (38%)</td>
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<td>strategic</td>
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<td>3. Human resources</td>
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<td>planning both</td>
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<td>that combine both</td>
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<td>at national</td>
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<td>professionalism</td>
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<td>and local levels</td>
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<tr>
<td>and intellectual</td>
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<td></td>
<td>(32%)</td>
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<td>capacity (34%)</td>
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<td>3. Lack of</td>
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<td>4. Emergence of</td>
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<td>interest and</td>
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<td>initiatives and</td>
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<td>new practices that</td>
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<td>involvement in</td>
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<td>also have impact</td>
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<td>cultural</td>
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<td>on strengthening</td>
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<td>activity and</td>
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<td>of partnerships</td>
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<td></td>
<td>policy (26%)</td>
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<tr>
<td>and dissemination</td>
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<td>4. Low level</td>
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<td>of culture,</td>
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<td>of technical</td>
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<td>particularly</td>
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<td>facilities</td>
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<td>among young</td>
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<td>and equipment</td>
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<tr>
<td>generation (28%)</td>
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<td></td>
<td>of public</td>
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<td>5. Richness and</td>
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<td>cultural</td>
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<td>diversity of</td>
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<td>institutions (23%)</td>
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<td>cultural traditions</td>
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<td>5. Lack of</td>
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<td>and heritage (</td>
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<td>management at</td>
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<td>tangible and</td>
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<td>all levels</td>
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<tr>
<td>intangible (27%)</td>
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<td>and low rate</td>
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<tr>
<td><strong>External</strong></td>
<td>Opportunities</td>
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<td>Threats</td>
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<tr>
<td>1. Increase of</td>
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<td>1. Lack of</td>
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<tr>
<td>partnership and</td>
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<td>motivation or</td>
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<td>cultural dialogue</td>
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<td>interest in</td>
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<td>between all</td>
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<td>culture and</td>
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<td>sectors, stakeholders and actors, including joint project activities and exchange of experience (59%)</td>
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<tr>
<td>2. Democratisation of the country to improve its cultural policy and administrative system in the cultural field, especially in accordance with European standards (35%)</td>
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<tr>
<td>3. Facilitation of capacity building and general professionalization of the cultural sector (27%)</td>
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<tr>
<td>4. Dissemination of national culture, reaching larger audiences and raising awareness of the value and benefits of culture, cultural projects and initiatives (19%)</td>
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<tr>
<td>5. Involvement of all sectors and stakeholders in joint project activities and their participation in cultural initiatives at local, national and international level (19%)</td>
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The main cultural legislation and policy needs to improve the culture sector’s ability to take advantage of the above described opportunities are:

1. Improvement of legislation related to culture and some its sub-sectors in accordance with European standards (49%)
   (In particular, improvement of legislation related to many subjects of cultural activities and the following issues: NGOs, strategic planning, copyright protection, cultural foundations, patronage and sponsorship, charity, taxation, state procurement etc.)
2. Introduction of new standards and approaches to the administration of cultural sector based on principles of democracy, cultural rights and freedoms (43%)
(Respondents have also indicated the following needs to be met by a new cultural policy: ensuring partnership between the government and civil sector and access to appropriate information; providing for community involvement and decentralization; implementation of strategic planning and forecasting in the field of culture; reforms to the administrative system and encouragement of cultural diversity etc.)

3. Introducing and providing for multilateral partnerships, exchange of experience, cross-sectoral cooperation and inter-cultural dialogue between all actors and stakeholders at local, national and international levels (29%)
(Respondents indicated many vectors of partnership, in particular: exchange, networking, cultural cohesion, integration into the European cultural space, participation in international programs in the field of culture and art, dialogue between governmental, private and civil sectors, cultural institutions and agents etc.)

The respondents have noted the high potential of cooperation, partnership and joint activities in the cultural field both with the member-states of the European Union and between countries participating in the Eastern Partnership (Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine). Concerning the current level of cooperation with EU member-states, the majority of respondents have indicated some activity with greater potential yet to unleash. The current level of cooperation between countries participating in the Eastern Partnership has been marked relatively low.

More than 50% of respondents have expressed their optimism on the future of culture and the cultural sector – a positive trend in a way to develop this field.

Moreover, the focusing on key components of all assessment vectors, Strengths, Weaknesses, Opportunities and Threats, also of main Needs and Priorities of cultural policy allows a conclusion about three main points to be taken into account:

- The key unfavourable factor that obstructs development of the cultural sector is the lack of partnership and exchange of experience at all levels and, in particular, of a dialogue between/within all sectors, actors and other stakeholders, international cooperation and exchange of experience. At the same time many respondents have indicated the lack of a comprehensive cultural policy based on democracy and cultural rights both at national and local levels. The main threat for the cultural sector is the lack of motivation, communality, interest and mutual understanding of the value of culture among authorities, communities, the private sector and individuals.

- The most important point noted by the respondents has concerned the strengthening and the increasing of partnership and cultural dialogue between all sectors, stakeholders and actors as a key opportunity and strength for the cultural sector. In particular, they indicated openness and tolerance existing within the community and development of joint project activities and exchange of experience. Moreover, another favourable factor for the cultural sector has been the democratisation of the countries and its effect on improvement of national cultural policy and administrative system in the cultural field, also in accordance with European standards. The participants specifically noted the cultural policy and cultural institutions reform process which combines improvement of cultural management and strategic planning.

- This is why many respondents have indicated, besides the improvement of legislation, the necessity of implementation of new standards and approaches to cultural sector administration based on principles of democracy, cultural rights and freedoms. The priority vectors of this activity are: ensuring partnership between the government and civil sector; better access to appropriate information; provision of community involvement and decentralization; implementation of strategic planning and forecasting in the field of culture; and administrative system reform.
• The key identified legislative needs are revision and amendment of the legislative framework related to following issues: culture, cultural activity, strategic planning, copyright protection, cultural foundations, patronage and sponsorship, charity, taxation, state procurement, non-governmental organisations etc.

Quantitative analysis

Question 1

When you think about the future of culture and the culture sector in your country, you are:

- Very optimistic (4/100) – 4%
- Optimistic – 53%
- Neither optimistic nor pessimistic – 12%
- A little bit pessimistic – 27%
- Very pessimistic – 4%
Question 7

A. What describes best the potential level of cooperation, partnership and joint activities in the area of culture between your country and the countries of the European Union? It is:

- Very high: 15/100 (99) – 15%
- High: 47%
- It is difficult to say: 20%
- Relatively low: 13%
- Very low: 4%

B. What describes best the potential level of cooperation, partnership and joint activities in the area of culture between your country and some or all of the countries participating in the Eastern Partnership (Armenia, Azerbaijan, Belarus, Georgia, Moldova, and Ukraine)? It is:

- Very high: 12%
- High: 39%
- It is difficult to say: 27%
- Relatively low: 18%
- Very low: 3%
Question 8

A. How would you describe the current level of cooperation, partnership and joint activities in the area of culture between your country and the countries of the European Union?

- There is a very high level of activity: 1%
- There is quite a lot of activity: 7%
- There is some activity but there could be a lot more: 56%
- There is relatively little activity: 24%
- There is no serious activity at all: 11%

B. How would you describe the current level of cooperation, partnership and joint activities in the area of culture between your country and some or all of the countries of the EaP region (Armenia, Azerbaijan, Belarus, Georgia, Moldova, and Ukraine)?

- There is a very high level of activity: 0/100 (98) – 0%
- There is quite a lot of activity: 8%
- There is some activity but there could be a lot more: 36%
- There is relatively little activity: 38%
- There is no serious activity at all: 16%
Question 9

a) Which of the following do you consider to be main components of a comprehensive cultural policy?

- 53% – All of them
- 54% – Preservation of cultural heritage (sites, artefacts, cultural skills)
- 46% – Dissemination of culture, reaching larger audiences
- 31% – Creation: contemporary work of artists, cultural production
- 42% – Research (audience research, culture mapping, cultural education)
- 45% – Professional training for artists, culture managers, workers in the field
- 36% – Basic & higher education (curricula development)
- 32% – Animation: stimulating community and civil society participation

b) Which three of these are going to be most relevant to the needs in your country in the next three years?

- 45% – Preservation of cultural heritage (sites, artefacts, cultural skills)
39% – Dissemination of culture, reaching larger audiences
22% – Creation: contemporary work of artists, cultural production
34% – Research (audience research, culture mapping, cultural education)
55% – Professional training for artists, culture managers, workers in the field
22% – Basic & higher education (curricula development)
34% – Animation: stimulating community and civil society participation

Qualitative analysis

Question 2

What do you think will be the three main threats or challenges for you or your organisation in the next three years (beside financial constraints)?

1. Lack of motivation, interest in culture and art or mutual understanding of the value of culture between/within authorities, communities, private sector and individuals

   (In particular, the respondents noted a low level of motivation among public authorities and the civil society, the lack of interest in culture (especially among young generation) and lack of communality and mutual understanding of benefits of public activity)

   30% (30/100)

2. Lack of human resources, especially of professional staff with appropriate knowledge

   (Particularly, the lack of professional staff, talented youth included, in the field of culture and art, and low level of their knowledge on fundraising and management)

   28%

3. Lack of partnership and cultural cooperation between/within

   27%
<table>
<thead>
<tr>
<th>Number</th>
<th>Issue</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>4.</td>
<td>Low level of technical facilities and equipment of public cultural institutions (urban and rural) and their access to modern technologies and resources, including for research purposes. Some of respondents noted the lack of appropriate facilities for their activities.</td>
<td>21%</td>
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<td>5.</td>
<td>Lack of efficient cultural policy based on democracy, cultural rights and freedoms. Including approaches to needs assessment, strategic-planning, culture recognition as a priority vector of sustainable development and community involvement.</td>
<td>21%</td>
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<td>6.</td>
<td>Inefficient and incomplete cultural legislative framework. Especially, the cultural legislation in general; also laws on such issues as copyright protection, taxation, museum activity, film industry, book publishing, cultural heritage protection etc.</td>
<td>19%</td>
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<td>7.</td>
<td>Low level of professional education in the cultural sector and professional knowledge of workers. In particular, the lack of appropriate vocational training, management, mobility or new approaches to teaching in the cultural education system and joint research and educational projects.</td>
<td>19%</td>
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<td>8.</td>
<td>Low level of civil society awareness and access to cultural products and services. A particularly low level of openness of cultural bodies and executives; the lack of information on culture, history, cultural products or services, related international programs and partner countries.</td>
<td>14%</td>
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<td>9.</td>
<td>Existing legislative limitations to cultural activities; also, administrative barriers that obstruct development of the non-governmental cultural sector and emergence of public initiatives. Including limited rights and opportunities for cooperation as well as activities of cultural institutions and cultural media; this also includes limited development possibilities for cultural industries and entrepreneurship.</td>
<td>13%</td>
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<tr>
<td>10.</td>
<td>Lack of public support to cultural activities and initiatives. Including the lack of national foundations, governmental technical assistance and support to public initiatives and projects in the field of culture and art.</td>
<td>10%</td>
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<td>11.</td>
<td>Low level of development of cultural and media industries and absence of cultural products and services distribution networks. Respondents also indicated the lack of marketing and advertising opportunities in both the media and cultural sectors and a low level of film industry and of film and books distribution.</td>
<td>9%</td>
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<td>12.</td>
<td>Lack of management and strategic planning in the field of culture and art. Including the lack of qualitative assessment of cultural policy and activity outcomes and evaluation of civil society needs and interests.</td>
<td>7%</td>
</tr>
<tr>
<td>13.</td>
<td>Current optimization of public cultural institutions including their reduction. Including the lack of new forms and methods of work – this issue related only to Ukrainian situation.</td>
<td>6%</td>
</tr>
<tr>
<td>14.</td>
<td>Lack of appropriate measures for safeguarding and renovation of cultural heritage.</td>
<td>5%</td>
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</tbody>
</table>
15. Integration of the national educational system into the European educational environment (Integration as a challenge to harmonisation of the domestic criterion of educational system with international standards and introduction of new teaching methods of vocational training in the field of culture) 4%

16. Unfavourable climate in society and political environment that inhibits cultural development 4%

17. Low level of cultural services and products because of the lack of appropriate knowledge and opportunities 4%

18. Low level of development and capacity building of the cultural sector (Respondents focused both on personal development and capacity building in general, especially through mobility and sustainability) 4%

19. Lack of democratic principles in the allocation of state support for culture and insufficiency of assistance to the non-governmental sector (Lack of technical assistance to the cultural sector and permanently opaque process of funds allocation to public culture institutions) 3%

20. Growing competition among cultural and media products and services 3%

**Question 3**

What do you think are the three main current strengths, advantages or positive characteristics of your organization or of the culture sector in your country?

1. **Strengthening of partnership and cultural dialogue between all sectors and actors, including through project activities and intersectoral and international cooperation** (In particular, the respondents indicated openness for communication, existence of international networks, joint project activities, cooperation between both governmental and non-governmental sectors at the local and national levels, and growing partnerships with international institutions) 44%

2. **Personal professional experience and knowledge** (Including personal experience and knowledge on fundraising, strategic planning and other issues, existing valuable experience of implementation of various projects) 38%

3. **Human resources that combine professionalism and intellectual capacities** (The respondents also noted peer communality and available staff capacity with relevant management skills and knowledge on fundraising and project-management matters) 34%

4. Emergence of initiatives and new practices that also impacts the strengthening of partnership and dissemination of culture, particularly among young generation (Some initiatives aimed at the development of culture at the local level, also at connecting culture with tourism and awareness-raising) 28%

5. Richness and diversity of cultural traditions and heritage (tangible and intangible) 27%

6. Institutional capacity with new model of cultural and research activity and best practices (Respondents have indicated the mobility of cultural institutions, existence of a range of available public and private cultural and educational institutions with specific functions as well as emergence of some institutions that create innovative cultural products and combine new functions) 23%

7. Creative capacity and scientific capability that have effect on the promotion of cultural expressions and emergence of new initiatives 21%
8. Increase of motivation, communality and strategic vision for development of the cultural sector in general and some its vectors among communities, authorities and individuals, in particular (Respondents have also indicated an increase of mutual recognition and trust among actors due to their personal capacities and sufficient professional experience and knowledge) 20%

9. Growing interest in culture and increase of cultural promotion among individuals, private and civil sectors and the media (Respondents have noted an interest in cultural activities and development of either cultural sector in general or some of its vectors among private and public sector representatives) 19%

10. The national educational system existing in the field of culture and art and its connection with best teaching traditions and good practices (Respondents indicated the process of integration of national educational institutions into European educational space and existing vocational training and joint educational programs) 10%

11. High quality of cultural products and services, including art performance 6%

12. Independence (also financial one) 6%

13. Introducing new forms and methods of operation and approaches to administration in the cultural field 5%

14. Accessibility of culture for society (Low free-entry costs) 4%

15. Openness of cultural space and favourable climate for activity 3%

16. The acknowledged international image of Georgia and its cultural and tourism potential 3%

**Question 4**

What do you think are the three main current weaknesses or problems of your organisation or of the culture sector in your country (other than lack of financial funding)?

1. **Lack of partnership and exchange of experience at all levels** (In particular, a lack of dialogue between/within all sectors, actors and other stakeholders, international cooperation and exchange of experience) 36%

2. **Lack of a comprehensive cultural policy based on democracy and cultural rights and approaches to strategic planning both at national and local levels** (Respondents have also noted excessive government intervention into cultural activities that inhibits the freedom for cultural expression and creativity) 32%

3. **Lack of interest and public involvement in cultural activities and policy** (Respondents have also noted the lack of motivation for cultural activities and cultural development among the community, cultural workers and youth) 26%

4. Low level of technical facilities and equipment of public cultural institutions (Respondents indicated the lack of facilities to perform their activities and use modern communications, including those necessary for research activities) 23%

5. Lack of management at all levels and low rate of implementation of new approaches to operation of cultural institutions 21%

6. Low professional level of staff and lack of appropriate knowledge (Especially as regards management, fundraising, art criticism, visual art, project management, new technologies and other specific knowledge related to art and culture) 20%

7. Low level of community awareness of culture activities and services (Including a lack of information concerning cultural programs and educational projects) 18%

8. Lack of human resources, especially professional ones 17%
9. Low rate of understanding of the role and needs of culture by authorities at national and local levels (In particular, a low level of state support to cultural activity and initiatives, the lack of appropriate measures for safeguarding intangible cultural heritage and promotion culture and art etc.) 16%

10. Low level of vocational training and professional program with new methodology (Including also training on visual arts and cinema) 11%

11. Unfavourable political, economic and social climate that inhibits cultural development and promotion of cultural expression 10%

12. Lack of efficient cultural legislation 9%

13. Lack of communality and mutual respect of cultural diversity (Respondents indicated also differences between the central and regional levels and between regions) 9%

14. Existing administrative barriers and legislative limitations of cultural activities that obstruct cultural development and cultural expression 8%

15. Lack of developed cultural infrastructure (In particular, the lack of a resource centre for culture, art institutions, film institutions, etc.) 6%

16. Lack of practical experience of cultural products and services promotion and dissemination, especially in the media (Respondents have also noted a low level of worldwide dissemination of national cultural products and the lack of production networks in the field of art and culture) 5%

17. The necessity of appropriate measures for safeguarding and renovation of cultural heritage (Including reform-based approaches to public administration of cultural heritage) 4%

18. Low level of social welfare available to cultural workers and a lack of appropriate incentives 4%

19. Lack of investment in culture 3%

20. Lack of independent funds and special governmental grant programs for culture 3%

21. Low level of research activities 3%

**Question 5**

What do you think are the three main actual or upcoming opportunities for your organisation or for the culture sector in your country, which should not be missed?

1. **Increase of partnership and cultural dialogue between all sectors, stakeholders and actors, including joint project activities and exchange of experience** (Many respondents noted the importance of stronger international relations and exchange in the field of culture and art. The next important vector is the dialogue between governmental, private and civil sectors and institutions. Respondents also noted the existing openness and tolerance within the community.) 59%

2. **Democratisation of the country that impacts improvement of cultural policy and administrative system in the cultural field, especially in accordance with European standards** (Respondents indicated different ways of cultural sector development, in particular reform-oriented cultural policy and cultural institutions, development of cultural management and strategic planning, introduction of animation and forecasting, the ensuring of civil society involvement in decision-making and cultural development processes, strengthening of research activities etc.) 35%
3. **Facilitation of capacity building and general professionalization of the cultural sector**  
   *(In particular, by developing creativity, using intellectual resources, promoting cultural expression and originality, improving fundraising and managerial skills and through participation in international conferences and training programs)*  
   27%

4. Dissemination of national culture, reaching larger audiences and raising awareness of cultural value and benefits, cultural projects and initiatives  
   *(Respondents mentioned various methods of culture promotion for ensuring awareness-raising and accessibility through the use of the media and implementation of educational programs and projects. They also indicated the importance of worldwide promotion of national culture and arts)*  
   19%

5. Involvement of all sectors and stakeholders in joint project activities and their participation in cultural initiatives at local, national and international level  
   19%

6. Encouragement and promotion of cultural initiatives, creativity and social activities  
   *(Respondents also indicated growing motivation to, and interest in, cultural activities and cultural development. Another yet positive trend/opportunity is the transfer of knowledge and exchange of experience.)*  
   18%

7. Development of cultural industries and promotion of diversity of national cultural products  
   *(Including development of creative industries and entrepreneurship and implementation of self-sufficiency of cultural institutions)*  
   16%

8. Introduction of new technologies in the cultural sector and modernization of cultural institutions  
   *(Especially, of digital and Internet technologies)*  
   11%

9. Development of professional training programs and national educational system upgrading in line with new standards  
   *(Respondents indicated the importance of the process of national educational system modernisation for provision of mobility and openness of institutions and development of non-formal education with involvement of cultural institutions. They also noted the importance of elaborating a training manual on culture and history of national culture.)*  
   11%

10. Improvement of cultural legislative framework in accordance with European standards  
    *(In particular, regarding arts, cinema, museum activity, sponsorship etc.)*  
    10%

11. Involvement of youth and children in cultural activities  
    9%

12. Promotion, safeguarding, conservation and revival of cultural heritage (intangible and tangible), and ensuring it viability  
    8%

13. Encouraging and promoting investments in culture  
    7%

14. Development of modern technology, especially IT, Internet & Telecommunications  
    *(And use of their potential in cultural activity)*  
    5%

15. Development of research activities in the cultural sector  
    *(Including implementation of researches into the history of national culture and cultural heritage and studies of culture and cultural activities of other countries, especially in the EU and the EaP region)*  
    3%

**Question 6**

What do you think are the three main needs cultural legislation and cultural policies should address, either in general or specifically to improve your/your organisation/the culture sector's chance to take advantage of the above described opportunities (other than increase of available financial funding)?

1. **Improvement of culture-related legislation and individual cultural sub-sectors in accordance with European standards**  
   *(Improvement of legislation related to numerous aspects of cultural activities)*  
   49%
2. **Introduction of new standards of and approaches to cultural sector administration based on principles of democracy, cultural rights and freedoms**
   (Respondents also indicated the following needs that a new cultural policy should respond to: ensuring partnership between the government and civil sectors; access to appropriate information; community involvement and decentralization development; implementation of strategic planning and forecasting in the field of culture; administrative system reform; encouragement of cultural diversity etc.)

3. **Introducing and providing multilateral partnership, exchange of experience, cross-sectoral cooperation and inter-cultural dialogue between all actors and stakeholders at local, national and international levels**
   (Respondents indicated many vectors of partnership, in particular: exchange, networking, cultural cohesion, integration into the European cultural space, participation in international programs in the field of culture and art, establishing a dialogue between governmental, private and civil sectors, cultural institutions and agents etc.)

4. **Introduction of tax benefits and incentives and of an appropriate state policy to encourage investments in culture and development of cultural industries, entrepreneurship and other related activities**
   (Many respondents noted the necessity of stepping up activities of public and non-governmental cultural institutions and individuals)

5. **Improvement of vocational training and educational programs in the cultural field**
   (In particular, to introduce the knowledge on management, marketing and fundraising, implement a joint educational program for students and non-formal education for society, promote exchange in educational sector, develop a training manual, reform the educational system in accordance with European standards etc.)

6. **Introduction of new financial and fiscal policy based on democratic approaches to provision of support to culture and mobilization of alternative resources in the sector**
   (In particular, provision of support to cultural initiatives from non-governmental sector, introduction of legislative framework for attraction of alternative resources in cultural institutions, and implementation of grant programmes and state procurement initiatives)

7. **Promotion and development of new cultural initiatives and joint project activities, also among the young**
   (This involves support to national cultural products and services, the ensuring of development of national cultural tourism and regional cultural initiatives)

8. **Elaboration of legal provisions for cultural activities and development of cultural sector based on cultural rights and freedoms**
   (This specifically concerns provisions on cooperation with international foundations, facilitation of access to official activity registration, research and entrepreneurship activities included, conditions for expanding responsibility and authority of public and non-governmental cultural institutions)

9. **Building greater awareness of cultural activities and their benefits as well as of the importance of the role of culture in sustainable development among community members**
   (Respondents also noted the importance of culture promotion by the media)

10. **Modernisation of public cultural institutions to introduce new technologies into the cultural sector and boost development of cultural industries**

11. **Ensuring community involvement in cultural activities and better access to culture, cultural products and services**
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<td>12.</td>
<td>Preservation and dissemination of national cultural heritage <em>(In particular, cultural heritage promotion through tourism)</em></td>
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<tr>
<td>13.</td>
<td>Providing and strengthening social welfare of cultural workers</td>
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<td>14.</td>
<td>Improving and amending the legal instruments and procedures of cultural objects imports and exports to create conditions for the free movement of cultural goods</td>
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<tr>
<td>15.</td>
<td>Facilitation of the issuance of visas to create conditions for free movement of cultural actors and goods from/in Ukraine</td>
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<tr>
<td>16.</td>
<td>Improvement and enforcement of regulatory and legislative instruments on copyright</td>
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