MESOC
measuring
the social dimension
of culture

H2020-SC6-TRANSFORMATIONS-2019

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*Deliverable D*6.1

MESOC Concept Note

File Type:	**R**
Circulation:	**Public (PU)**
Version:	**#1.0**
Date:	**7th September 2020**
Stage:	**Final**
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Partners involved:	**eCo, KEA, DAStU, UB, UoR**

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EDITOR'S NOTE

A public deliverable explaining in a nutshell the proposed method for cultural value and impacts assessment and the key aspects of the project's workplan.

KEYWORDS

Cultural statistics, societal impacts of culture, transition variables and indicators.

DISCLAIMER

STATEMENT OF ORIGINALITY

This Deliverable contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

DOCUMENT HISTORY

Version	Issue Date	Stage	Content and changes
#0.1	4th February 2020	Draft	Concept presented by the Coordinator during kick-off meeting
#0.2	23rd July 2020	Draft	First full version for internal review at eConcult
#0.3	31st August 2020	Draft	Shared with partners and reviewers
#1.0	7th September 2020	Final	Document uploaded to Sygma after a meeting with the PO

EXECUTIVE SUMMARY

This document summarizes the theoretical and analytical framework of the MESOC project.

MESOC is an EU-funded Research and Innovation Action (project ID: 870935) responding to the challenge posed by the H2020-SC6-TRANSFORMATIONS-2019 Call for Proposals: "*To develop new perspectives and improved methodologies for capturing the wider societal value of culture, including but also beyond its economic impact*".

The focus of the project is on measuring the societal value and impacts of cultural policies and practices.

Activities started in February 2020 for a contractual duration of 3 years under the coordination of eConcult, the University of Valencia Cultural Economics and Tourism Research Unit, leading a consortium of 10 partners, including 3 European cities, 7 more participating as associates, and a number of international experts from both research and practice acting as External Advisory Board (EAB) members.

The project concept is based on liaising the 10 domains of the UNESCO Framework of Cultural Statistics (2009) – partly, but not wholly adopted by EUROSTAT with the 2012 ESSnet-Culture initiative – with the 3 crossover themes of the new European Agenda for Culture (2018) defining The Social Dimension of Culture: namely Health and Wellbeing, Urban and Territorial Renovation and People's Engagement and Participation. The purpose of that liaison is to define, discuss and validate a long list of impact generation and transmission variables and indicators, associating each single UNESCO domain with either of the European Agenda for Culture's crossover themes.

Knowing that impact is a very broad and somewhat evanescent term, the project approach (based on a theory of change) is to look into available documentary evidence – be it from published or unpublished sources, e.g. academic or policy papers – and identify those strong or weak signs pointing at an ongoing "transition" of the underlying scenario towards a desired/purposeful or simply materialised/involuntary transformation of its initial conditions.

This means that in its first phase, lasting for 15 months according to the contractual plan, MESOC will gather a collection of documents from many sources – up to 1,000 publications in English, including summaries done by the project partners of non-natively-English texts – into an online repository and will use it as an evidence base for its own purposes. Research is following two parallel directions: one "bottom up" (exploring the contents of documents through ad-hoc, keyword based and/or semantic search facilities) and one "top down" (mostly relying on unique expert knowledge

of the MESOC partnership and advisory board, both including prominent profiles in the domain at hand).

Both research directions are aimed to identify meaningful transition variables and indicators for the scenarios of transformation described in the documents, and to understand the related, critical factors in determining the final outcomes of the identified transition pathways.

In the next 12 months of project work, the results of the first phase will be validated in two ways: on the one side, by a Delphi consultation exercise, run via questionnaires sent to a European panel of experts, using the eConcult's online survey facility named AU Culture platform; and on the other hand, by establishing a policy dialogue with public officials and top/middle managers in charge of culture in the 10 City administrations participating in the project.

This synthetic publication reflects the status of consortium work after the first 6 months under two main respects:

a) Drawing a more detailed, analytical picture of the three crossover themes of the European Agenda for Culture defining The Social Dimension of Culture; and

b) Delving into the 10 domains of the ESSnet-Culture Framework with the twin purpose of disentangling their internal components and the respective overlaps.

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GLOSSARY OF USED TERMS

Acronym	Definition
D	Deliverable
DoA	Description of the Action
EAB	External Advisory Board
EC	European Commission
ECP	External City Panel
EU	European Union
EUROSTAT	Statistical Office of the European Communities
H2020	Horizon 2020
ICT	Information and Communication Technology
MESOC	Measuring the Social Dimension of Culture
T	Task
ToC	Table of Contents
UNESCO	United Nations Educational, Scientific and Cultural Organization
WP	Work Package

1   INTRODUCTION

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This synthetic publication reflects the status of consortium work after the first 6 months under two main respects[1]:

a) Drawing a more detailed, analytical picture of the three elements of The Social Dimension of Culture, with the purpose of highlighting the trends, dynamics and key targets and influencers of transition (actors, resources, ecosystems etc.) that are most likely to be affected by a purposeful use of culture as social impact driver, or may contribute by a significant extent to activating or strengthening some impact transmission mechanisms; and

b) Delving into the 10 domains of the ESSnet-Culture Framework with the twin purpose of disentangling their internal components and the respective overlaps, so as to map the evolving nature of the underlying phenomena and assess whether a residual category (or more) should be added, to capture emerging aspects and trends not well captured by the existing structure (such as cultural tourism, cultural consumption of disabled people etc.).

The structure of this document is as follows:

- Chapter 2 entitled "The Social Dimension of Culture" overviews the three crossover themes that the New European Agenda for Culture has introduced and relates them to the MESOC Structural Model;

- Chapter 3 entitled "The Background Statistical Framework" clarifies the point of departure of the proposed research agenda – the so-called MESOC Matrix;

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[1] These two bullet points are copied from the MESOC DoA (Description of the Action).

- Chapter 4 entitled "The MESOC Concurrent Research Directions" summarises the proposed 'bottom up' and 'top down' implementation approaches and clarifies their expected landing points – hopefully converging to one another until the project's end;

- Chapter 5 draws some conclusions and indications for future work.

2   THE SOCIAL DIMENSION OF CULTURE

Following the 2007 European Agenda for Culture[2], the European Commission adopted a New Agenda in May 2018 to take into account the evolution of the cultural sector over the past decade. The New European Agenda for Culture[3] provides a framework for cooperation among the Member States and with the EU Institutions, which started in 2019. In this new framework, Member States define the main topics and working methods for policy collaboration on culture through Work Plans for Culture adopted by the Council of Ministers. The 2019-2022 Work Plan for Culture, adopted on 27 November 2018[4], sets out 5 main priorities for European cooperation in cultural policy-making[5], complemented by 17 concrete actions with clearly defined working methods and target outputs.

Presented in the form of a Communication from the Commission, in response to a mandate received from the December 2017 European Council, The New European Agenda for Culture with its accompanying Staff Working Document[6] introduces the concept of **cultural crossovers**, to be used as theoretical lenses for assessing the impacts of culture in different fields such as health and well-being. In fact, one of the main innovations set forth by the Agenda is the introduction of a distinct, strategic objective named "*Social Dimension*", which is about "*harnessing the power of culture and cultural diversity for social cohesion and well-being*".

In MESOC, the three main crossover themes introduced by the Agenda have become elements of a Structural Model that can be visually represented as follows.

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[2] http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32007G1129%2801%29

[3] https://ec.europa.eu/culture/sites/culture/files/commission_communication_-_a_new_european_agenda_for_culture_2018.pdf

[4] http://data.consilium.europa.eu/doc/document/ST-13948-2018-INIT/en/pdf#http://data.consilium.europa.eu/doc/document/ST-13948-2018-INIT/en/pdf

[5] Namely: Sustainability in cultural heritage, Cohesion and well-being, An ecosystem supporting artists, cultural and creative professionals and European content, Gender equality and International cultural relations.

[6] https://ec.europa.eu/culture/sites/default/files/2020-08/swd-2018-167-new-european-agenda-for-culture_en.pdff

Figure 1: The MESOC Structural Model.

In the following four chapters, the three elements of the model are considered first individually and then jointly, with the purpose of highlighting the starting conditions of the proposed research approach.

2.1   Health and Well Being

It is acknowledged that culture influences people's behaviour, their self-esteem and ultimately well-being. In addition to that, numerous examples exist of successful medical therapies using cultural participation to improve the physical and mental health of patients. Available studies confirm that cultural access is the second most important determinant of a person's psychological wellbeing, preceded only by the absence of disease. In a 2017 Eurobarometer Survey, 71% of surveyed people agreed that living close to places related to Europe's cultural heritage can improve quality of life.

Nowadays, health and well-being are linked to multiple and complex factors, such as lifestyle and social and economic circumstances. As underlined by the "rainbow model" of Dahlgren and Whitehead, many health issues can be determined by social factors (Dahlgren and Whitehead, 1991). In a socially-influenced health model, individuals are placed at the centre while surrounding them are various layers of factors that influence health-like individual lifestyle choices, community influences, living and working conditions, and more general social conditions.

The link between the arts and health has a long history, ranging from the clinical use of creativity and artistic techniques to the recreational and environmental use of the arts (Matarasso, 1997). The most rigorous research into the health benefits of the arts was conducted with a focus on individual health and well-being in a clinical and therapeutic setting in which artistic activities were put beside

medicinal therapies (Chatterjee, Vreeland and Noble, 2009; Daykin, Byrne, Soteriou and O'Connor, 2008; Hacking, Secker, Spandler, Kent and Shenton, 2008; Staricoff, Duncan and Wright, 2003).

Furthermore, in the last couple of decades, well-being has become a concern of many governments that have become disillusioned with the traditional use of GDP or income as a measure of their citizens' happiness, health and wealth. Governments have been introducing new indices of progress and wellbeing to guide their policy-making in all over the world. Culture appears in many of these notions of national wellbeing. Cultural practices and consumption have started to be considered important elements in the determination of the well-being and health of a nation as well as of an individual.

There is an impressive amount of evidence that cultural participation may have strong and significant effects on life expectation (Hyyppä et al., 2006; Konlaan et al., 2000), mortality due to cancer (Bygren et al., 2009) and more recent research seems to suggest that the impact is equally strong in terms of self-reported psychological well-being (Grossi et al., 2011; Grossi et al., 2018; Grossi et al., 2012; Tavano Blessi et al., 2016). In particular, it turns out that cultural participation is the second predictor of psychological well-being after (presence/absence of) major diseases, and in this respect has a significantly stronger impact than variables such as income, place of residence, age, gender, or occupation (Grossi et al., 2012). Moreover, the studies show how in social contexts where cultural consumption is high, this relationship is stronger (Tavano Blessi et al., 2016).

2.2   Urban and Territorial Renovation

Most cultural initiatives, activities and occupations develop in cities (and are concentrated in large metropolitan areas). This is not by chance, as the exchange of ideas and experiences, the cultural "mix" that is quintessential to a City is an enormous positive externality for society as a whole, and has a notable impact on the capacity of cultural activities to generate social and economic value. But there is more: urban and territorial planning, design and architecture, and the different models of civic governance play a key role in promoting the creation of built environments as well as 'open discussion spaces' - soft structures for civic participation - that enhance individual and group creativity, providing opportunities for all to take part in city making and co-create the "urban". Finally, cultural infrastructure projects and "softer" initiatives such as the European Capital of Culture testify the importance of heritage preservation and restoration for an improved quality of community life – and more generally, for collective identity and sense/place making.

As stated in the 2018 Davos Declaration on high-quality Baukultur for Europe[7], *"we urgently need a new, adaptive approach to shaping our built environment; one that is rooted in culture, actively builds social cohesion, ensures environmental sustainability, and contributes to the health and well-being of all"*. The Urban Agenda Partnership for Culture and Cultural Heritage, created in November 2018 under the Urban Agenda of the EU, has the objective of defining actions to improve regulation, financial capacity and data/knowledge exchange of EU Urban Authorities sharing the common goal of improving the management of their historical built environment and preserving the quality of urban landscapes and cultural heritage. An Orientation Paper[8] was published in November 2019, presenting the composition and functioning of the Partnership. Finally, the revised Leipzig Charter – more than 20 years after the signature of the original one, promoting the adoption of integrated urban development policies and setting out for the first time in a single EU document the key principles behind them – will be presented during the Ministerial Meeting to be held in Leipzig, as part of the German Presidency events, in November 2020. The Charter reaffirms the concept that culture is at the core of any sustainable urban development, including the preservation and development of the built and non-built cultural heritage.

The interplay between urban and territorial renovation, culture and cultural initiatives, and urban governance modes (Degen and Garcia, 2012) is widely recognized as a developmental key for cities to offer a high quality of life at both spatial and social levels (Evans, 2005). Everything started in Europe in the mid-1980s when post-industrial cities seek to revive former industrial, contaminated and waterfront sites and their city centres, as they aimed to establish themselves in the new arena of the global market (Tavano Blessi et al., 2012); later on the cultural economy wave emerged giving rise to concepts like "the creative city" (Landry, 2000) and cities started looking at cultural planning and programming as strategies to enable economic development as integrated with spatial and social regeneration (Boni and Kern, 2018). In the complexity of the discussion related to the interplay between cultural initiatives and urban and territorial regeneration, a more recent recurrent perspectives can be identified as for cultural policies to promote (Culture for Cities and Regions, 2017; Boni and Kern, 2018) innovation, self-awareness, self-esteem and social cohesion, people empowerment, intercultural dialogues, i.e. the immaterial dimension of urban regeneration is becoming more and more relevant when looking at cultural policies as a way to develop and sustain human capital (Backman and Nilsson, 2016). Together with this shift the relevance of the governance mode grew in the discussion due to the need to consider culture no longer as an 'add-on' rather as an integral part of any organizational scheme including local authorities and partnership bodies responsible for urban

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[7] https://ec.europa.eu/culture/sites/culture/files/staff_working_document_-_a_new_european_agenda_for_culture_2018.pdf

[8] https://ec.europa.eu/futurium/en/culturecultural-heritage/culture-and-cultural-heritage-orientation-paper

regeneration (Evans and Show, 2004). MESOC will consider the governance/organizational dimension as a relevant sensor for the needed integration of cultural perspectives with actions in urban management, planning and renovation: governance modes and policies and norms adopted to infrastructure them, will be considered by MESOC as cultural policies themselves: they in fact contribute to the culture of public, multicultural, social interactions so contributing to the immaterial, social dimension of urban renovation.

Although there is room to believe that culture may indeed become a main driver in the development of urban systems, the relationships between culture and the city show a greater degree of complexity than previously surmised. It has only been in the last few decades that the economic functionality of the symbolic dimension of urban spaces has granted a certain theoretical consistency. Analysing the different approaches, we can identify four perspectives (Boix, Rausell and Abeledo, 2016)

Culture as a subject that embodies its intrinsic value, be it as the foundation of human rights or as a sector that features prominently and is directly involved in urban development processes. It is in this dimension where the new phase of the cultural- cognitive capitalism of the cities can be found.

Culture as a context, where the symbolic dimension is just a space for reference in which economic processes, not necessarily related to culture, unfold. An example would be large iconic investments with a significant impact on the real estate sector.

Culture as a pretext, in which the valuation of economic or political processes is based on the reputation and legitimation of cultural and creative activities. Here, the symbolic dimension exists in the field of meanings and communication.

Culture as a resource, when the cultural dimension turns into an input for different productive processes.

Some cities being very successful, are widely celebrated for the way they are able to manage the combination and interplay of the several dimensions; still, the adoption of culture-led regeneration models and experiences has demonstrated to be hard as for final outcomes and impacts: "knowledge about what works at various urban and regional scales is sorely lacking" (Markusen and Gadwa, 2010: 379) and evidences of the extent to which culture and cultural initiatives activate, contribute to, and achieve regeneration objectives are not easily measured.

Capturing the inner mechanisms explaining how cultural planning and programming affects urban regeneration soon became a "must" and some researchers started to develop assessment frameworks (Currid and Williams, 2010; Stern and Seifert, 2010; Rosenstein, 2011) and systems of indicators (Jackson et al., 2006; Jones, 2017; Rahbarianyazd and Doratli, 2017) also in the perspective to make

experiences and lessons learnt usable and transferable. MESOC will consider the assessment and indicator frameworks that have been already developed but also it will take into account that, within the wide landscape of developed researches and studies several risks associated with cultural initiatives have been identified and discussed (Navarro Yanez, 2013): some authors focussed, for example, on the uncertain impacts of big (cultural) events (Garcia, 2004); some others looked at risks like gentrification (Markusen and Gadwa, 2010; Gainza, 2017) or impacts unequal distribution (Chong, 2005).

2.3   People's Engagement and Participation

Obviously, cultural consumption by individuals and social groups is a precondition for culture to deploy its positive effects as mentioned above. This consumption is filtered, not only by psycho-social factors, but also by any barrier to entry existing on the supply side. But there is more: with the new societal trend of "prosumerism" and the widespread diffusion of creative opportunities and authoring instruments within the population – just think of civic journalism, interactive theatre, "sports for all" or DIY audio/video production – more and more people today see themselves as having the right to express their creativity, and actually exercise that right to the best of their capacities under the available conditions.

Audience and citizen engagement and participation in the cultural and creative sectors is at the heart of any cultural agency (Gell, 1998) and of the EU agenda and programmes, such as Creative Europe. Relationship with and engagement of communities is intrinsic in the idea of culture, and the question of civic emancipation is consubstantial of the history of arts - and especially performance (Rancière, 2011). It has to be noticed that cultural participation brings about also a number of sensible issues, i.e. in terms of power (Walmsley, 2013); democracy (Holden, 2008); ethics (Matarasso, 2019); etc.

Research on cultural participation in the arts is extensive; however in the last years we are witnessing a "participative turn" (Bonet and Négrier, 2018b) that is changing the cultural policy panorama and dynamics. Among relevant research in terms of cultural participation and its social implications, it is important to mention the study prepared for the Council of Europe as part of the European Year of Citizenship in 2005 on culture's social effects on citizens and their enhanced capacity for effective collective action (Stanley, 2005). The issue of access to culture and social inclusion have been analysed by scholars like Laaksonen (2005) who stresses the importance of adopting a cultural rights approach; or in studies outlining good practices in the arts (Jermyn, 2004). Modalities of participation have been studied by Brown et al. (2011), who depict five main typologies according to the degree of participant's involvement, which can be linked to different paradigms of cultural policy –

namely excellence, creative economy, cultural democracy and cultural democratisation (Bonet and Négrier, 2018b).

Studies focused on impacts of participation in the field of culture have been carried out by renowned authors like Matarasso (1997), Stanley (2006) and Brown and Novak-Leonard (2013), among others. However, Merli (2002) criticizes the lack of strong theoretical grounding in much research on the social impact of participation in the arts, suggesting to adopt contributions from other fields of research.

MESOC acknowledges also the work carried out and the results emerged from audience-centric European projects, such as the Creative Europe-funded BeSpectACTive! on active spectatorship in the performing arts (Bonet and Négrier, 2018a; Bonet et al., 2018); ADESTE+ project (the continuation of Leonardo-funded ADESTE) aimed at expanding cultural participation (Fiaccarini et al., 2018); ENGAGE AUDIENCES and its resulting study that analysed successful approaches and methods in the area of audience development (Bollo et al., 2017); and Erasmus+-funded projects like CONNECT, a Knowledge Alliance for Audience Development (Carnelli et al., 2017), among others.

2.4   The MESOC Structural Model

These three elements, taken individually, obviously influence each other and involve (if we take on a normative perspective) very important aspects of public policy such as research, education, and planning. Taken together, as we propose to do in MESOC, they form a coherent picture of the way culture carries its societal impacts, creating value to the individuals and the communities in ways that are qualitatively known and to some extent predictable and practiced by policy innovators, yet very hard to bring to quantitative measurement.

The MESOC Structural Model – inspired by a previous similar endeavour carried out by Barata, Marsh and Molinari and reported in a UNESCO Chair publication[9] – addresses this impact measurement problem by providing a framework that helps identify the potential relevance of 'on-the-ground' initiatives as they unfold.

The framework in question is based on the following assumptions:

1) **Impact is an evanescent concept**. Apart from the misuse of the term, quite frequent at all levels – from research to practice to policy – whereby it happens to be considered as a synonym of 'result', 'effect' or "outcome", of a certain intervention, it is also very subjective,

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being dependent on who defines impact and for which purpose and in relation to which affected target (individual or group).

2) **Impact assessment is always related to an intervention**. It tries to respond to the fundamental question, whether and to which extent the intervention in question "has worked well", in relation to the change(s) it aimed to introduce in a certain context and in relation to a certain, AS-IS situation to be modified in a certain TO-BE direction, usually for the benefit of a certain target (individual or group).

3) **Impact is referred to as synonym of change**. A change induced or triggered by that intervention, comparing the AS-IS with the TO-BE (or the 'ex-ante' with the 'ex-post') situation.

4) **Referring to an intervention's impact as synonym of 'induced or triggered change' is wrong.** Contextual factors also matter for change, and are at least as important as the intervention itself. In no real-life situation can we reliably state – and especially demonstrate – that "only that intervention mattered". Change can occur and be observed irrespective of any particular intervention, and go in the same or the opposite direction due to a plethora of concurrent elements, which the intervention cannot easily or fully control for. The latter may have been counterproductive, rather than proactive, and still generated some impact, or its negative effects may have been fully neutralised by the 'spontaneous' or 'uncontrolled' change in the external environment. Usually the scale of any intervention is too limited, because of e.g. lack of sufficient resources, to counteract those effects. Time is needed, usually beyond the scheduled end of a certain intervention, for its results to start being impactful.

5) **Impact is hard to measure, virtually impossible**. The well-known linear intervention flow, moving from 'objectives' to 'actions', then from 'actions' to 'outputs', then from 'outputs' to 'outcomes', and finally from 'outcomes' to 'impacts', makes sense when we look at the time dimension, and also to the underlying logic, of that intervention – logically we need to experience some outcomes before recording any impacts – but does not help in any way to measure induced (or triggered) change. Why? Because the connection between 'outcomes' and 'impacts' is far from being direct and linear, apart from the mere progress of time. Change depends on many factors, some or most of which totally disconnected from the intervention, and the influence of which remains impossible to disentangle – not to say measure according to a certain criterion, or set of criteria and metrics.

Taking on these five assumptions, the MESOC consortium has borrowed and started to adapt as a possible answer to the question about the "societal impacts of culture", the concept of **transition**

impact, from a literature stream initiated since its foundation in 1991 by the European Bank for Reconstruction and Development (EBRD)[10]. In that stream, transition impact is defined as the measurable effects of a (Bank-funded) intervention on the contextual factors (such as rules, markets or institutions) that concur to the transformation of a country from a centrally planned to a well-functioning market economy. In other words, the idea was to narrow the focus on the (measurable) changes, induced or triggered by a certain intervention, in the status of some elements of the external environment which were known to contribute positively to achieving the desired impacts but could not be easily captured by a comparison of the situation 'before' and 'after' the intervention, neither 'ex-ante' nor 'ex-post'[11]. Much in the same way as in the MESOC Structural Model, the concept of "transformative impact" was associated with three dimensions: (a) structure and size of the market(s); (b) institutions and policies that govern market(s); and (c) market-based skills, conduct and innovation. And for each dimension, the analysis went further into identifying the channels through which the EBRD-sponsored interventions could possibly influence it, and therefore contribute to the desired impacts. For example, the transition impact analysis identified two directions of transformation for the structure and size of markets: increased competition and the enhancement of competitive interactions in the upstream and downstream markets to the sector where the intervention was implemented. Either of the two directions, or both of them if jointly undertaken, were "rated" by the Bank in their capacity to induce change across time.

2.5   The MESOC Transition Impact Analysis

The MESOC evaluation approach works pretty much in the same way as described above for the EBRD (see Figure): given a certain cultural policy or practice, the main focus of our project is set on identifying, first of all, the **transition pathways** that in a certain local context can be relevant to generate societal impacts, clustered according to the three crossover themes of the European Agenda for Culture. Then in association with each pathway, one or more **transition variables** will be identified: namely contextual elements, which can be measured before and after the intervention, not necessarily because the latter had some influence on them, but only due to the fact that controlling for their variation across time can provide support to the thesis that the cultural policy or practice under inspection is generating public value and/or affecting, at least to some extent, the target individuals or groups.

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[10] Besley T., Dewatripont M., and Guriev S. (2010) Transition and Transition Impact. A review of the concept and implications for the EBRD. Report for the EBRD's Office of the Chief Economist. London, European Bank for Reconstruction and Development.

[11] Carbajo, J. (2006) Assessing the contribution of investment projects to building a market economy: Beyond Cost-Benefit Analysis? University of Milan Working Paper n. 39, p. 4. Presented at the Fifth Milan European Economy Workshop, 26-27 May.
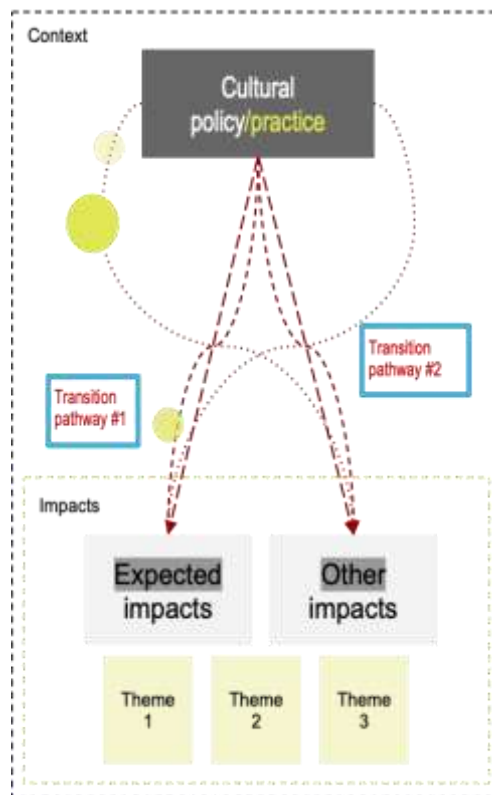
Figure 2: Transition Impact Analysis in MESOC (our elaboration).

As the literature[12] on transition variables demonstrates, the advantages of adopting them as proxies for the impacts we are interested in analysing and measuring, are twofold:

- On the positive side, the external observer is freed from the theoretical conundrum that in any more or less complex ecosystem, internal processes are unlikely to be linear (i.e. action x will never lead straight to result y), which makes any impact assessment exercise virtually impossible to handle;

- On the normative side, used transition variables can be related to an underlying 'theory of change'[13] referring to that cultural policy or practice (seen as instrument) and cultural cross-over (seen as target of influence), thus making the connection between theory, practice and policy more solid and less arbitrary than it would seem after taking our previous argumentations at face value.

The way MESOC will set up and execute this research program is way too complex to be described in detail in this Deliverable, which is destined to be read by a non-expert audience. However, a summary of the proposed 'bottom up' and 'top down' approaches is provided in Chapter 4. What needs to be added at this stage – to avoid any misunderstanding, also within the project consortium

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[12] See also Bertamino F., De Maggio M., La misurazione della S3: aspetti metodologici ed introduzione al pilot test [in Italian]. Joint presentation at a State Region workshop entitled "Governance e Indicatori di misurazione della S3", in Rome, 25-26 November 2013.

[13] See https://www.theoryofchange.org/what-is-theory-of-change/

– is that **the proposed exercise is not limited to the goal of identifying**, for individual cultural policies or practices in specific locations, **what the transition variables are that explain the development and achievements of a single case study**. The expectation here is far more ambitious, namely to collect recurrent information on the same kinds of transition pathways and variables across multiple case studies, in order to give sufficient ground to the generation of a corresponding set of **transition indicators**, which will be proposed to UNESCO, EUROSTAT and the national statistical institutions of the EU Member States in order to improve the current measurement toolbox for the societal dimensions and impacts of culture and cultural policies and practices.

3   THE BACKGROUND STATISTICAL FRAMEWORK

As outlined in the previous Chapter, the focus of MESOC is on measuring the societal value and impacts of cultural policies and practices. Therefore, its ultimate goal – and also, advance over state of the art – is to contribute to a revision of the existing scenario of cultural statistics to make room for impact indicators related to the three crossover themes of The Social Dimension of Culture.

This scenario is characterised by three main reference sources:

- The **UNESCO Framework of Cultural Statistics** (2009)[14]: this is a comprehensive set of standard definitions and concepts of culture that enable the measurement of a wide range of cultural expressions irrespective of the particular economic and social mode of production. It is also a classification instrument that incorporates the use of currently available international classification systems such as the International Standard Industrial Classification (ISIC) for cultural production activities, the Central Product Classification (CPC) for cultural goods and services, the International Standard Classification of Occupations (ISCO) for cultural employment, the Harmonised Commodity Description and Coding System (HS) for international flows of cultural goods, and the UN Trial International Classification of Activities for Time-Use Statistics (ICATUS) for cultural participation. The result is a tool and methodology designed for use at the international and national levels as a basis for organizing the collection and dissemination of cultural statistics. The main objective is to provide a conceptual foundation and a common understanding of culture, through its standard definitions, for the production of internationally comparable data.

- The **Council of Europe's Indicator Framework on Culture and Democracy** (IFCD)[15]: this was formed after a decision by the 2013 Council of Europe Conference of Ministers of Culture on 'Governance of Culture – Promoting Access to Culture' to do more targeted work on indicators of the impact of cultural activities on democracy. The IFCD collected data on culture and democracy starting with a set of dimensions, or analytical lenses, for each domain, further broken down into components, each comprising a number of indicators that currently summarise more than 170 variables on 37 Council of Europe Member States. The IFCD defines culture in a narrow sense: as cultural activity (or production) that is based on cultural

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[14] http://www.uis.unesco.org/Library/Pages/DocumentMorePage.aspx?docIdValue=183anddocIdFld=ID

[15] https://www.coe.int/en/web/culture-and-heritage/indicators-culture-and-democracy

values emphasising cultural freedom, equality, and pluralism. It is therefore more tightly related to one of the three crossover themes of the New European Agenda for Culture – obviously People's Engagement and Participation.

- The **EUROSTAT ESSnet-Culture Methodological Framework for Culture Statistics** (2012)[16]: this is described in a report from a special working group of national experts set up in 2009 by EUROSTAT and structured in four thematic task forces, on 'framework and definitions', 'financing and expenditure on culture', 'cultural industries' and 'cultural practices and social aspects'[17]. The value of this initiative comes from the fact that it unified into a single view the concepts, codes and definitions used by the different classifications adopted by national statistical offices and data collectors (e.g. by means of surveys and polls). Differently from the UNESCO Framework, the 10 covered domains do not include natural heritage, craft in general, software industry and telecommunications activities, general printing activities, equipment and supporting material, tourism, sport and recreation (which also includes gambling, for instance).

Based on the ESSnet-Culture framework, EUROSTAT has built a consistent cross-sectoral, publicly available database with various statistics relating to culture. These statistics are introduced in a dedicated section on culture[18] on the EUROSTAT website and have been the subject of several thematic *Statistics explained* articles published over the past few years.

3.1   ESSnet-Culture

The ESSnet-Culture framework for cultural statistics covers 10 cultural domains, namely the following:

- Heritage

- Archives

- Libraries

- Books and Press

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[16] https://ec.europa.eu/assets/eac/culture/library/reports/ess-net-report_en.pdf

[17] The first group was tasked with updating the conceptual framework for culture and cultural economic activities set up by the European Leadership Group on Cultural Statistics (LEG-Cultura) in 2000; the second was responsible for the definition of cultural economy and cultural employment indicators; the third group carried out an inventory of data sources about public and household spending on culture and defined cultural financing indicators; lastly, the fourth group was focused on cultural practices and social participation in culture.

[18] https://ec.europa.eu/eurostat/web/culture/overview

- Visual Arts

- Performing Arts

- Audio-Visual and Multimedia

- Architecture

- Advertising

- Art Crafts

and 6 main functions:

- Cultural creation

- Cultural production/publishing

- Cultural dissemination/trade

- Cultural preservation

- Cultural education

- Cultural management/regulation.

Though not exactly describing a linear process, these functions constitute – so to speak – the "supply side" of cultural activities. On the "demand side", the ESSnet-Culture framework introduced four main categories, also termed "modes of cultural participation", namely the following[19]:

- **Information**, that is, to seek, collect and spread information on culture;

- **Communication and Community**, or to interact with others on cultural issues and to participate in cultural networks;

- **Enjoyment and Expression**, that is, to enjoy exhibitions, art performances and other forms of cultural expression, to practice the arts for leisure, and to create online content;

- **Transaction**, or to buy art and to buy or reserve tickets for shows.

From the initials of the above terms, a so-called "ICET Model" has been proposed, which summarizes the key activities related to people's fruition of and engagement in cultural practice.

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[19] This taxonomy is based on the study by De Haan and Van den Broek entitled "Nowadays Cultural participation: An Update of What to look for and Where to look for It", which characterised itself for adopting a broad concept of cultural participation, including all activities connected to personal visits, habits and amateur practices.

In figure below, which refers to the generic domain XYZ, we matched the four elements of the ICET Model against the six cultural functions mentioned above in order to outline some, quite obvious directions of interaction, represented by the dotted arrows[20], for instance:

- From personal self-expression to cultural creation (green arrow);

- From cultural production/publishing to personal/collective fruition and enjoyment (blue arrow);

- From cultural trade to purchase transactions involving art works or event tickets (orange arrow);

- From cultural education to increased awareness, therefore information spreading and communication with third parties about cultural product/events (red arrows).

Figure 3: Directions of interaction between cultural production and participation (our elaboration of the ESSnet-Culture framework).

Due to their relevance for the MESOC project, the 10 domains are presented in more detail in separate subchapters below.

As far as the 6 functions are concerned, the following Table provides a definition of each of them.

Table 1: The six main functions of the ESSnet-Culture framework

Function	Description
Cultural creation	This function must not be confused with the concept of creativity. It includes those activities related to the elaboration of artistic ideas, contents and original cultural products.

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[20] More are also possible, which are not visualised therein.

Cultural production/publishing	Both terms refer to activities that make an original cultural work available for fruition. Specifically production is related to non-reproducible cultural artifacts while publishing is related to reproducible ones.
Cultural dissemination/trade	This function corresponds to the acts of communicating, sharing or selling the cultural products to third parties (audience, collectors, etc.).
Cultural preservation	This function refers to those activities that help conserve, protect, restore and maintain cultural heritage. Digitization is considered as part of it, despite also having a goal of dissemination (and maybe trade).
Cultural education	This involves both formal and informal skills development and knowledge transfer activities on cultural topics, also including awareness raising.
Cultural management/regulation	Management includes administrative and technical support activities carried out by public or private organizations. Regulation refers public action aimed to encourage or protect cultural activities (e.g. through copyright law).

3.1.1 *Heritage*

This domain is associated with all previous functions except Cultural creation (but is also related to the latter, as Heritage derives from past creations and can inspire present creations). It pertains to the operation of

- Archaeological sites

- Art galleries

- Historical monuments and places

- Museums

- Other visitor attractions, usually public, although in some cases can be privately owned

- Intangible heritage (which encompasses languages and all living expressions and traditions).

Examples of activity by function are presented in the following table.

Table 2: Exemplary activities by function in the Heritage domain (adapted from ESSnet-Culture)

Function	**Activities in the Heritage Domain**

Cultural creation	N/A
Cultural production/publishing	- Constitution of museum collections - Recognition of historical heritage
Cultural dissemination/trade	- Museum exhibitions - Museography and scenography - Art gallery activities (incl. eCommerce) -Trade of antiquities (incl. eCommerce)
Cultural preservation	- Operation activities for historical sites - Preservation of intangible cultural heritage - Restoration of museum collections - Restoration of protected monuments - Archaeological activities - Applied research and technical preservation
Cultural education	- Formal and informal teaching and learning activities
Cultural management/regulation	- Administrative management (public or private bodies)

3.1.2 *Archives*

This domain is quite close to the previous one and therefore associated with all the functions except Cultural creation. It pertains to the operation of

- State archives

- Local archives (more often public than private)

- Digital archives (generated from the former or natively so).

Examples of activity by function are presented in the following table.

Table 3: Exemplary activities by function in the Archives domain (adapted from ESSnet-Culture)

Function	Activities in the Archives Domain
Cultural creation	N/A
Cultural production/publishing	- Acquisition of documents
Cultural dissemination/trade	- Consultation of archives - Archive exhibitions

Cultural preservation	- Archiving activities - Digitisation
Cultural education	- Formal and informal teaching and learning activities
Cultural management/regulation	- Administrative management (public or private bodies)

3.1.3 *Libraries*

This domain is also quite close to the previous two and therefore associated with all functions except Cultural creation. It pertains to the operation of

- National libraries

- Municipal libraries

- School libraries etc.

Examples of activity by function are presented in the following table.

Table 4: Exemplary activities by function in the Libraries domain (adapted from ESSnet-Culture)

Function	Activities in the Libraries Domain
Cultural creation	N/A
Cultural production/publishing	- Acquisition and organisation of collections
Cultural dissemination/trade	- Lending activities
Cultural preservation	- Preservation activities
Cultural education	- Formal and informal teaching and learning activities
Cultural management/regulation	- Administrative management (public bodies)

3.1.4 *Books and Press*

Contrary to the previous ones this domain is associated with all the six functions. It pertains to the news and literary works creation, distribution and advertising. Key actors in this domain are:

- Journalists

- Authors

- Publishers

- Agents

- Translators

- Interpreters, etc.

Examples of activity by function are presented in the following table.

Table 5: Exemplary activities by function in the Books and Press domain (adapted from ESSnet-Culture)

Function	Activities in the Books and Press Domain
Cultural creation	- Creation of literary works - Writing of cultural articles for newspapers and periodicals - Translation and interpretation activities
Cultural production/publishing	- Publishing of books (incl. by Internet) - Publishing of newspapers and magazines (incl. by Internet) - News agency activities
Cultural dissemination/trade	- Organization of book conventions and promotion events - Galleries and other temporary exhibitions - Trade of books and press (incl. eCommerce)
Cultural preservation	- Protection activities for books and newspapers - Restoration of books
Cultural education	- Formal and informal teaching and learning activities
Cultural management/regulation	- Administrative management (public or private bodies) - IPR and royalty management - Artistic agents and engagement agencies

3.1.5 *Visual Arts*

This domain is also associated with all the six functions. It pertains to creative art products that are to be appreciated by sight, such as paintings, sculptures, graphic design elements (as opposed to literature and music works and with the exception of Audiovisual and Multimedia products, which

are separately dealt with in another domain below). It therefore includes creative and artistic efforts related to:

- Fine arts

- Plastic arts

- Photography

- Aesthetic design and graphics.

Examples of activity by function are presented in the following table.

Table 6: Exemplary activities by function in the Visual Arts domain (adapted from ESSnet-Culture)

Function	Activities in the Visual Arts Domain
Cultural creation	- Creation of graphical and plastic art works - Creation of photographical works - Design creation
Cultural production/publishing	- Production of visual art works - Publishing of photographical works
Cultural dissemination/trade	- Organization of visual art conventions and events - Galleries and other temporary exhibitions - Trade of visual art works - Art market (incl. eCommerce)
Cultural preservation	- Protection of visual art works - Restoration of art works
Cultural education	- Formal and informal teaching and learning activities
Cultural management/regulation	- Administrative management (public or private bodies) - IPR and royalty management

3.1.6 *Performing Arts*

This domain refers to artists using their voices, bodies or inanimate objects to convey artistic expression. It is different from visual arts, where artists use paint, canvas or various materials to create physical or static art objects. Performing arts generally include a range of creative activities which are done in front of a live audience, such as theatre, music, dance and object manipulation.

Like the previous domain, this also involves all the six functions above. In particular, the three aspects are considered of organising, supporting and operating:

- live theatrical presentations, concerts, opera, ballet, drama, cabaret and other stage events;

- circuses, orchestras, theatrical companies or bands;

- individual artists such as actors, dancers, musicians, lecturers or speakers.

Examples of activity by function are presented in the following table.

Table 7: Exemplary activities by function in the Performing Arts domain (adapted from ESSnet-Culture)

Function	Activities in the Performing Arts Domain
Cultural creation	- Creation of musical, choreographic, lyrical, dramatic works and other shows - Creation of technical settings for live performances
Cultural production/publishing	- Organisation of performing art works - Support and technical activities for producing live shows
Cultural dissemination/trade	- Live presentation activities - Booking services
Cultural preservation	- Restoration of musical instruments
Cultural education	- Formal and informal teaching and learning activities
Cultural management/regulation	- Administrative management (public or private bodies) - IPR and royalty management - Artistic agents and engagement agencies

3.1.7 Audiovisual and Multimedia

By Audiovisual, we normally refer to electronic media possessing both a sound and a visual component, such as films, TV programs, computer games and webcasts. Multimedia is content that uses a combination of text, audio, images, animations, video etc. However, these definitions are loose and in fact, radio broadcasting is also included in this domain, not to mention the interactive IT systems used in education (eLearning). Compared with Visual Arts, what makes a difference here is the technological dimension. In both domains, all six cultural and creative functions are involved. To summarise, the Audiovisual and Multimedia domain comprises the production and post-production of the following outputs of creative activity:

- Film

- Radio (incl. Internet)

- Television (incl. Satellite)

- Video

- Sound recordings

- Multimedia works (incl. computer games)

- Other – as shaped by the progress of technology (e.g. web pages, mobile applications).

Examples of activity by function are presented in the following table.

Table 8: Exemplary activities by function in the Audiovisual and Multimedia domain (adapted from ESSnet-Culture)

Function	Activities in the Audiovisual and Multimedia Domain
Cultural creation	- Creation of audiovisual works - Creation of multimedia works
Cultural production/publishing	- Motion picture, video and audiovisual programme production - Television programme production (incl. Internet) - Publishing of sound recordings, films, videotapes (incl. by the Internet) - Publishing of multimedia works - Publishing of computer games - Radio programme production (incl. web) - Audiovisual post-production activities
Cultural dissemination/trade	- Organization of film/video conventions and event-organising activities - Radio and TV broadcasting (incl. by internet) - Film projection - Film/video distribution - Renting of video tapes and disks - Trade of audiovisual works (incl. eCommerce) - Temporary audiovisual exhibitions
Cultural preservation	- Protection activities for audiovisual and multimedia works - Restoration of audiovisual and multimedia works

Cultural education	- Formal and informal teaching and learning activities
Cultural management/regulation	- Administrative management (public or private bodies)
	- IPR and royalty management
	- Artistic agents and engagement agencies

3.1.8 *Architecture*

Historically, Architecture is defined as both the process and the products of planning, designing, and constructing buildings or other structures. Architectural achievements are often perceived as cultural symbols and those surviving the oldest civilisations are used to characterise and sometimes recognise them. However, we have already introduced the Heritage domain including the ancient architectural works whilst there is little value in considering the most modern ones, as they ultimately embed little artistic value. Therefore, only a small proportion of architectural activities are actually included in this domain - namely architectural design - whilst the planning/construction side – namely the second function in the table below - is omitted as irrelevant for a better definition of the domain.

Examples of activity by function are presented in the following table.

Table 9: Exemplary activities by function in the Architecture domain (adapted from ESSnet-Culture)

Function	Activities in the Architecture Domain
Cultural creation	- Architectural creation
Cultural production/publishing	N/A (landmarks?)
Cultural dissemination/trade	- Temporary architectural exhibitions
	- Gallery exhibitions
Cultural preservation	- Architectural preservation activities
Cultural education	- Formal and informal teaching and learning activities
Cultural management/regulation	- Administrative management (public or private bodies)
	- IPR and royalty management

3.1.9 *Advertising*

By Advertising it is intended both the profession of producing advertisements for commercial products or services and the resulting means of communication. Like in the previous domain, there is a

huge overlap with a set of activities that have a clear industrial component – no longer manufacturing, but service related, such as in marketing. Therefore, neither the production nor the distribution or preservation of advertising material are considered in this domain – although in some cases, advertising models and designs have taken on an artistic or cultural value and are put on display in exhibitions and similar events.

Examples of activity by function are presented in the following table.

Table 10: Exemplary activities by function in the Advertising domain (adapted from ESSnet-Culture)

Function	Activities in the Advertising Domain
Cultural creation	- Creation of advertising works
Cultural production/publishing	N/A
Cultural dissemination/trade	- Exhibition of advertising designs
Cultural preservation	N/A
Cultural education	- Formal and informal teaching and learning activities
Cultural management/regulation	- Administrative management (public or private bodies) - IPR and royalty management

3.1.10 *Art Crafts*

The term stands for the creation of original cultural products by a wide variety of activities involving making things with one's own hands. Outputs are often an important part of traditional heritage (also linked with intangible heritage). However the focus here is on present time activities, and all the six functions are covered by the domain definition.

Examples of activity by function are presented in the following table.

Table 11: Exemplary activities by function in the Art Crafts domain (adapted from ESSnet-Culture)

Function	Activities in the Art Crafts Domain
Cultural creation	- Creation of artistic crafts
Cultural production/publishing	- Production of artistic crafts

Cultural dissemination/trade	- Artistic craft exhibitions and trade (incl. eCommerce)
Cultural preservation	- Restoration of artistic crafts
Cultural education	- Formal and informal teaching and learning activities
Cultural management/regulation	- Administrative management (public or private bodies)

3.2   Wrap-up

As described in subchapter 2.5 and visualised in Figure 2, the MESOC Transition Impact Analysis focuses on identifying recurrent transition pathways (and variables, and indicators…) that can be considered descriptive enough of an underlying phenomenon – value creation and societal impacts – which most likely escapes the evaluation, not to say quantitative measurement.

Putting together the 3 dimensions of societal impact in the MESOC Structural Model presented in Chapter 2 with the 10 cultural domains of the ESSnet-Culture framework described in this Chapter, our point of departure is constituted by the following 10x3 matrix. At the intersection between rows and columns, we propose an incomplete and arbitrary list (just to exemplify our approach) of transition variables – which could be used as theoretical lenses to measure the transition, or social impact generation and transmission pathways associated to each cultural domain. For example, by putting "Practical and concrete grounding of creativity" at the intersection between "Art crafts" and "People's Engagement and Participation", we are hypothesizing (in a positive attitude) or suggesting to the policy maker (in a normative perspective) that one of the social impacts of Art crafts valorisation is to instantiate personal creativity into more and more practical and concrete forms and expressions. Then the question may be if the same process could be activated for Audiovisual and Multimedia – an emergent cultural industry that is heavily impacting on the empowerment of artists' creative capacities and craftsmen's efficiency in production - and even magnified in the context of the so-called "prosumerist revolution"[21].

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[21] By the term "prosumerism" we refer to the widespread diffusion of creative opportunities and authoring instruments within the global population – just think of civic journalism, interactive theatre, "sports for all" or DIY audio/video production. Nowadays, more and more people around the world see themselves as having the right to express their creativity, and actually exercise that right to the best of their capacities under the available conditions.

	Health and Well Being	Urban and Territorial Renovation	People's Engagement and Participation
1.Heritage	Preserving the memory of the past	Valorising the identity of place	Promoting a diffused sense of belonging
2.Archives		Creating symbolic and intellectual assets	Interlinking distant locations
3.Libraries	Promoting solidarity and civic sense	Taking up new roles in city life	Attracting socially disadvantaged groups
4.Book and Press	Acknowledging multiculturalism, racial tolerance	Introducing new urban practices	Supporting new social models
5.Visual Arts		Reconnecting the urban fabric	
6.Performing Arts	Art therapies	Increasing the resilience of social structures	
7.Audiovisual and Multimedia	Opening up to new forms of creativity		Stimulating social media presence and interaction
8.Architecture	Improving quality of surrounding landscape	Enhanced value of the public space	Emergence of community spheres
9.Advertising		Multicultural spread and contamination	
10.Art crafts	Inspiring contrasts (between old and new)	Building social/local transaction patterns	Practical and concrete grounding of creativity

Figure 4: The MESOC 10x3 Matrix[22].

In fact, the main difference between the EBRD and the MESOC methodology, lies in the existence (in the former case) or absence (in the latter case) of a well-structured theoretical background that can suggest to the external observer which among the many possible variables can receive the status of transition drivers and be effective and recurrent enough to deserve the association with measurable

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[22] Note: the contents of the cells are arbitrary, for exemplification only.

indicators to be gathered at broad European level. In the next Chapter, we will briefly explain the two distinct and parallel approaches we aim to undertake during the project's lifetime in order to reach this goal.

4   THE MESOC CONCURRENT RESEARCH DIRECTIONS

The MESOC 10x3 Matrix outlined in subchapter 3.2 and visualised in Figure 4 constitutes the point of departure for the implementation of the project's research agenda. How this is going to be implemented is briefly summarised in the following text.

Two approaches are carried out in parallel: one "bottom up" (exploring the contents of documents through ad-hoc, keyword based and/or semantic search facilities) and one "top down" (mostly relying on unique expert knowledge of the MESOC partnership and advisory board, both including prominent profiles in the domain at hand).

4.1   Bottom Up Direction

The Bottom Up research stream is centred on the MESOC Semantic Search Engine, an IT tool now under development at the University of Rijeka, using **Artificial Intelligence** capabilities to facilitate the identification of semantic – i.e. content rich, not simply keyword frequency based – correlations between rows and columns of the MESOC 10x3 Matrix, resulting from the analysis of culture related documents collected from different sources (by now academic papers and soon also policy texts and grey literature examples, such as project reports/briefs and newspaper or website articles).

Work has already started to collect, select and analyse relevant documentation on the societal impacts of cultural policies, covering all the three dimensions of Health and Well Being, Urban and Territorial Renovation, People's Engagement and Participation, described in Chapter 2 above. At this stage, all documents are considered if originally drawn in English language to facilitate retrieval and interpretation. However, a template for document summary has already been created, which will include the basic information gathered after reading a text in another language than English. In so doing, the goal of a uniform coverage of all EU will be achieved by project's end.

An online database is already available (in beta version) stored on a server of the University of Rijeka, whereby the keyword based and the semantic queries will soon be started in a systematic manner. The document collection is being tagged on-the-fly according to the 10+3 labels of the MESOC Matrix presented in Chapter 3 as the major point of departure of this research agenda. In this way, a first level classification of the database contents is realised. While a first edition of the repository has been made available already at project month 6 – i.e. in July 2020 – to facilitate the upcoming experimentations, two more updates are planned for months 21 and 36, respectively. Thus, this online repository of documents will stand high among the permanent legacies of the MESOC project.

By the implementation of the Semantic Search Engine on this collection of documents, it will be possible to extract "bigrams", "trigrams" or "n-grams" (i.e. meaningful strings of 2, 3 or more numerous words), and put these terms at the intersection between rows and columns of the MESOC matrix, in order to produce a set of (candidates to be identified as possible) transition variables extracted from the available documentation in a totally bottom up fashion.

To give an idea to the reader of the figures involved in this endeavour, we can use the following table:

Table 12: The Bottom Up research direction of MESOC

Goal	KPI	Start in	End in
Develop the Semantic Search Engine	1 up and running facility (beta version)	February 2020	January 2021
	1 official release, with all tested functionalities	February 2021	January 2022
Develop the document collection repository	1 repository up and running (in beta version)	February 2020	July 2020
	1 internal revision, based on MESOC partner requirements	August 2020	January 2021
	1 official release, with contents stored and working search facilities (including the MESOC Semantic Search Engine)	February 2021	October 2022
	1 final release, as described above	November 2022	January 2023
Fill the repository in with contents	1000+ publications (from academic and grey literature)	September 2020	January 2023
Associate to each document in the repository a suitable collection of n-grams	1-2 n-grams per document analysed	February 2021	January 2023

Concerning the last two KPIs – during the first project semester a number of experimentations were run with different assumptions and ways of proceeding. Based on the lessons learnt from those experimentations, the above KPIs have good chances of being largely exceeded in two respects:

- From the results of early stage, small scale experiments (using only Architecture as a domain, and only Urban Renovation as a societal impact dimension), the number of n-grams candidating to play the role of transition variables exceeds the target KPI by at least an order of magnitude. This creates an opposite need to what was actually expected: that is, instead of using the "top down" research approach (on which, see next subchapter for more details) to increase the number of candidate transition variables per document, the same should be used to reduce it. Or another round of automated n-gram extraction should be introduced, aimed at a sort of ranking by statistical frequency of all the n-grams extracted from all available documents during the first round of semantic search;

- Once the Artificial Intelligence system has been "trained" and made work on a sufficient number of documents and cases, it is likely that it may act proficiently on any publication, irrespective on its being stored on the University of Rijeka server or not. In addition, a side research is ongoing to demonstrate if there is any added value in working on the full text of the document instead of a summary of it, like e.g. the abstract of an academic paper instead of the full paper itself. In case that research was successful in showing the equivalence of using a concise version of a longer text, even the target number of document sources could increase dramatically, for instance through simply linking the data freely available in the open access databases of Scopus, Web of Science, etc. to the online document repository developed in MESOC.

Once available, the early stage results of the Bottom Up research stream will be validated through Delphi consultations with a large representation of EU experts from the institutional, academic and professional domains. For more information, see subchapter 4.3 below.

This research stream is expected to conclude its work by suggesting a (tentative) set of statistical data sources (better if practically and economically feasible) to complement existing measures of the societal value and impacts of culture by adding the effects on personal well-being and health, citizens involvement and participation, urban identity and renovation.

4.2   Top Down Direction

The description provided above of the "bottom up" research work can seem, and probably is, atheoretical, in the sense that the role played by Artificial Intelligence is to explore and highlight the "hidden correlations" between elements on the rows and elements on the columns of the MESOC 10x3 Matrix, irrespective of any underlying theories - or educated guesses - explaining them in advance. In other words, these correlations are expected to result from a mere (so to speak) semantic

analysis of the texts provided in the project's document repository as potentially relevant for the discourse at hand, and the task is then left to the researcher of finding appropriate explanations for the evidence gathered in that way.

As explained at the end of subchapter 3.2, this approach is to some extent forced and in all cases justified by the fact that available literature on the societal impacts of culture is rather scanty at the moment, to say the least, when it comes to identifying the transition pathways (and variables, and indicators) in a good number of distinct case studies, covering different "cells" of the MESOC Matrix and enabling the delivery of reliable conclusions for both researchers and practitioners (including policy makers).

However, it is not completely true that the exercise carried out in the project is atheoretical. This is due to a variety of reasons, which we will try to summarize here below.

First of all, the documents provided to feed the repository are supplied by the academic partners of MESOC, including the members of the EAB, who are prominent profiles in the domain at hand.

Second, the rationale behind the MESOC Transition Impact Analysis (see subchapter 2.5) is all but atheoretical: apart from any consideration, quite original per se, of the methodological flaws of the "conventional wisdom" on impact measurement, the transition pathways and variables are not else than an ex-ante and/or ex-post reconstruction of the underlying theory of change supporting innovations in cultural policies and practices, which candidates to be an alternative point of view to those prevailing in this research area.

Third, and following on this train of logic, the academic partners of MESOC – notably Politecnico di Milano for urban related themes, the University of Barcelona and eConcult for the broader topic of culture and cultural policy – are currently reflecting on what can be taken as evidence of the internal dynamics of the identified case studies, using local collections of (by now only academic) papers, clustered by the three crossover themes (Health and Well Being, Urban and Territorial Renovation, People's Engagement and Participation) and with the addition of a fourth cluster dealing with general/generic societal impacts.

In so doing, a number of challenges have been identified, which will contribute to shaping the forthcoming project activities in this stream. Some of them are:

- Polysemous words. Examples: design as a cultural subdomain (relevant), or design as a noun/verb (irrelevant?); heritage as a cultural domains (relevant), or heritage as synonym of legacy (irrelevant?);

- Document contents covering multiple domains (row identifiers) and/or crossover themes (column identifiers), making it difficult to disentangle the respective influences (from which to which) not to say transition pathways;

- Blurred borders of both domains and crossover themes, which need clarification. Examples: the Architecture domain (see subchapter 3.1.8) excludes the construction side, but this is not easy to assess in a paper; even the New European Agenda for Culture does not describe what is exactly meant by each of the three crossover themes, making the attribution of a concept to the respective perimeter always arbitrary to some extent;

- Activities not formally included in any of the 10 ESSnet-Culture Framework domains, such as festivals (possibly part of Performing Arts, see subchapter 3.1.6) or the complex programmes of the European Capitals of Culture. These have to be contrasted with other activities that are purposefully not part of the Framework, such as fashion design or tourism, sport and recreation, which may well bring some interesting effects to e.g. personal well-being, but have been excluded from this analysis since its conception;

- The need to make a distinction between interpretative practice (e.g. playing an instrument, painting, dancing, etc.) and other types of cultural practice (attendance, co-programming activities with neighbours, youth managing a festival etc.) as well as between active and passive practices;

- The ambiguity of the cultural creation function when it comes to amateur performance or engagement, as distinct from putting a cultural product at free disposal of other people as beneficiaries

- The importance of context – e.g. a quote to a music concert which did not happen in the same place as that described in a paper.

- The possible role played by verbs and other expressions reflecting dynamism (such as "growth" or "development") but also the negative forms of possible impacts (e.g. "reduction of anxiety" as proxy or synonym for "increase of personal comfort").

All these and other challenges will be properly accounted for in the next phase of the Bottom Up research stream.

4.3 Validation and Piloting

According to the contractual workplan agreed with the European Commission, the findings of the Bottom Up and Top Down research streams will be validated and piloted in real or realistic environments as described here below.

4.3.1 *Delphi Consultation Exercise*

Starting in May 2021, a Delphi consultation will be set up with the participation of a large number of institutional, academic and professional actors involved in cultural policies and practices at wide European level. As the Delphi methodology prescribes, several rounds of questionnaires will be sent around, and their anonymised responses aggregated and shared back with the groups after each round.

The purpose of this exercise is to validate the project findings in terms of contents of the 10x3 Matrix - i.e. reasonable and appropriate transition variables and associated indicators measuring the impact transmission and progress towards societal value creation. The early results of this validation exercise will be made internally available in October 2021 and used as starting points for the pilot configurations. The final results (including any feedback received from the pilots) will be published early enough to be presented at the final project conference in October 2022, and support the delivery of Methodological Guidelines for academics and practitioners willing to replicate the MESOC approach on a different scale, or simply borrow the results of this exercise to inform evidence based policy plans, programmes and initiatives.

The Delphi questionnaires will be distributed via an existing platform at eConcult, named **AU Culture**. This is a mobile and web application used for measuring the visitor or participant experience during and after the fruition of a cultural product or service. Through AU Culture, the user is exposed to an instant poll asking few questions on the perceived - cognitive, emotional, aesthetic and social - impacts that a cultural event has induced on her/him. A Likert scale from 1 to 10 is adopted for (anonymously) gathering the replies, which are then aggregated into a database that allows understanding the global degree of satisfaction in a certain event, but also to compare different ones or analyse the reactions for each specific segment of audience.

This approach is user-oriented and treats the consumer as a co-producer, avoiding the interviewer-dominated feedback collection process. It is also cost effective, as many replies can be gathered quite easily, right at the time of experience, in line with the most advanced marketing techniques. Its original development has been financially supported by the Valencian Agency of Innovation.
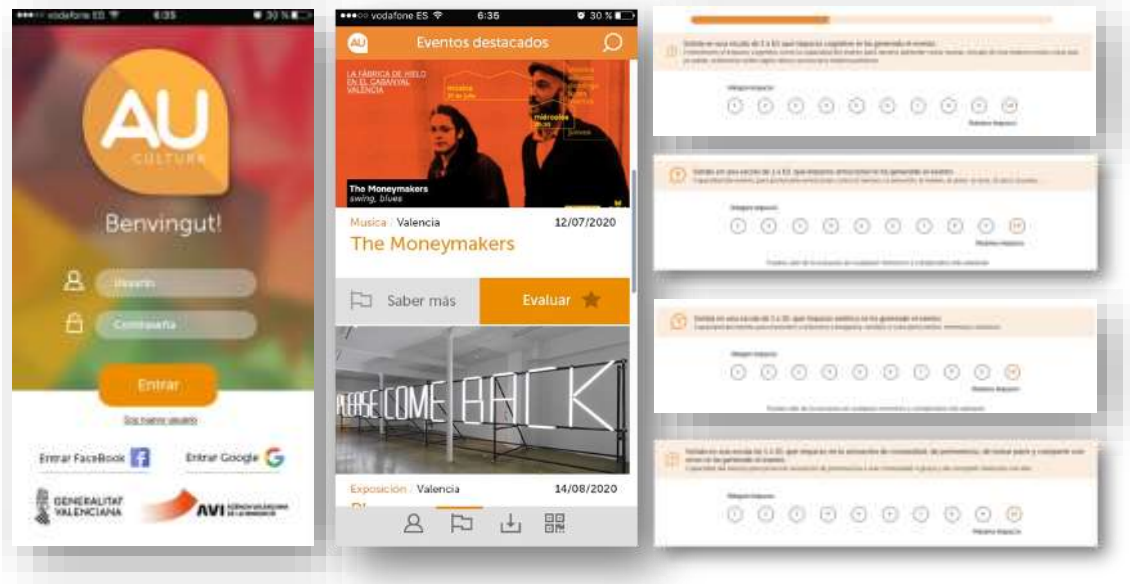
Figure 5: Screenshots of the AU Culture mobile app.

4.3.2 *Urban Policy Dialogues*

Already during the project, the MESOC research approach will be tested within **10 European City pilots**, which have been identified in the DoA. Pilot testing will consist in:

- Feeding the project's document repository with a local collection of cultural policies and practices – each with its own summary description in English – and using the keyword based and the semantic search engines to extract the most appropriate transition variables and indicators in retrospect, and to analyse what have been the critical success factors in determining the final outcomes of the selected impact transmission pathways;

- Establishing policy dialogues with public officials and top/middle managers in charge of culture at City level, to define a suitable group of ongoing/forthcoming projects and initiatives, with the aim of identifying the key transition variables in each case, and to propose indicators to measure the societal impacts of those activities according to the underlying "theory of change".

Admittedly, the former activity is more time consuming for both parties involved, therefore will be prioritised in the three Cities that are funded partners of the MESOC consortium, directly or through special agencies: **Cluj (RO)** for the Health and Well-Being theme, **Rijeka (HR)** for the Urban and Territorial Renovation theme, and **Athens (EL)** for the People's Engagement and Participation

theme. In addition, the City of **Warsaw (PL)** accepted to play the role of external testbed for all the crossover themes.

The latter activity – the policy dialogues – will be set up in all Cities, but particularly in those associated to the consortium as external (unfunded) partners. These are: **Turku (FI) and Valencia (ES)** for the Health and Well-Being theme, **Milano (IT) and Issy-les-Moulineaux (FR)** for the Urban and Territorial Renovation theme, **Barcelona (ES) and Gent (BE)** for the People's Engagement and Participation theme. To facilitate a fruitful interaction with MESOC, each of them nominated a person to become part of the MESOC **External City Panel (ECP)** and a specific partner of the consortium was appointed as "buddy" to one City, in charge of co-defining and co-realising the specific goals of this activity.

Finally, the major EU association of Cities, **Eurocities**, accepted to support MESOC by a number of direct animation and dissemination activities involving both its associates and the general public across the 3 years of project duration, thus paving the way for the creation of a **European community of interest** on the topic of how to measure the societal value and impacts of cultural policies and practices.

Through the organisation of an international workshop in Milan, February-March 2021, which will also coincide with a dedicated meeting of both the EAB and ECP, a strategic alignment will be sought between the MESOC project vision and objectives and the ambitions and interests of the 10 proposed pilots with their common and distinctive elements. The preparatory actions for the event, carried out in partnership between each involved City and the corresponding partner or EAB member, will concur to the definition of the global scenario of MESOC pilots as well as the specific direction that each City pilot will undertake.

The outputs of pilot validation beyond the organisation of the Milan workshop, will consist in 10 pilot descriptions and plans, one per City, each issued twice – an interim version in January 2022 and a final one in September 2022.

4.4   The MESOC Toolkit

The ultimate, expected output of the project is a Free and Open Access, online service (named **the MESOC Toolkit**) to be used by both researchers and practitioners (the latter including both policy makers and cultural operators from all over the EU) to measure the societal value and impacts of cultural policies and practices. Similar to many other existing monitoring systems – also in the domain of culture – characterised by the geo- referencing of supplied information at city level, the

innovation brought up with this toolkit is that the data and analyses visualized will deal with the transition variables and indicators identified in the respective cultural policies and practices. In so doing, other cities of similar size and comparable interests will be facilitated in the stock taking of project results and the replication of the proposed method in other urban contexts.

Figure 6: Pictorial representation of the MESOC Toolkit.

5   CONCLUSIONS

The MESOC project is still at the beginning of its journey. With this synthetic publication we have shared the main details of our concept and research agenda with interested third parties.

Evidently we are proposing a different concept and implementation avenue, which complements, but also innovates previous and current initiatives in two main respects:

- By dealing with the societal impacts and value created out of cultural activities, while other existing frameworks so far have focused their attention on the economic dimension and outputs/outcomes, particularly in terms of growth and jobs;

- By using Artificial Intelligence to introduce new, relevant and not-too-hard to collect and compute data and indicators, in compliance with the provisions of the New European Agenda for Culture.

If successful, our endeavour may help to some extent reduce the need to build statistical indicator series that are hard to collect and anyway suffer from a number of theoretical limitations, and turn the attention of policy makers and practitioners in Europe on what really matters to achieve the desired impacts, irrespective of the possibility of measuring them.

The consortium work until project's end in January 2023 will be inspired by these principles and we cordially invite you to follow and contact us via the official MESOC website: https://www.mesoc-project.eu/

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