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Culture in Times of COVID-19 Resilience, Recovery and Revival

The culture sector faces a time of great change after weathering the global challenges wrought by the COVID-19 pandemic. In the destructive wake of lost livelihoods and revenue, this report provides a first global assessment of the pandemic's varying impacts across sub-sectors and regions, and presents an integrated policy framework to support the recovery of the sector.

Advocating for a paradigm shift in the governance of culture to bolster its resilience and sustainability, the report sets forth collaborative and multidisciplinary action areas to improve the socio-economic status of artists and cultural professionals, and to nurture an interconnected ecosystem rooted in cultural diversity and creativity. This system-wide approach is supported by key data that underscores the importance of promoting culture as a public good and protecting equality and opportunity across the entire cultural value chain.

Culture in Times of COVID-19: Resilience, Recovery and Revival outlines untapped opportunities for stakeholders across government, civil society, and the private and public sectors, and calls for coordinated efforts to fortify the culture sector, secure its resiliency in the future, and unleash its potential as a driver of sustainable and inclusive development.

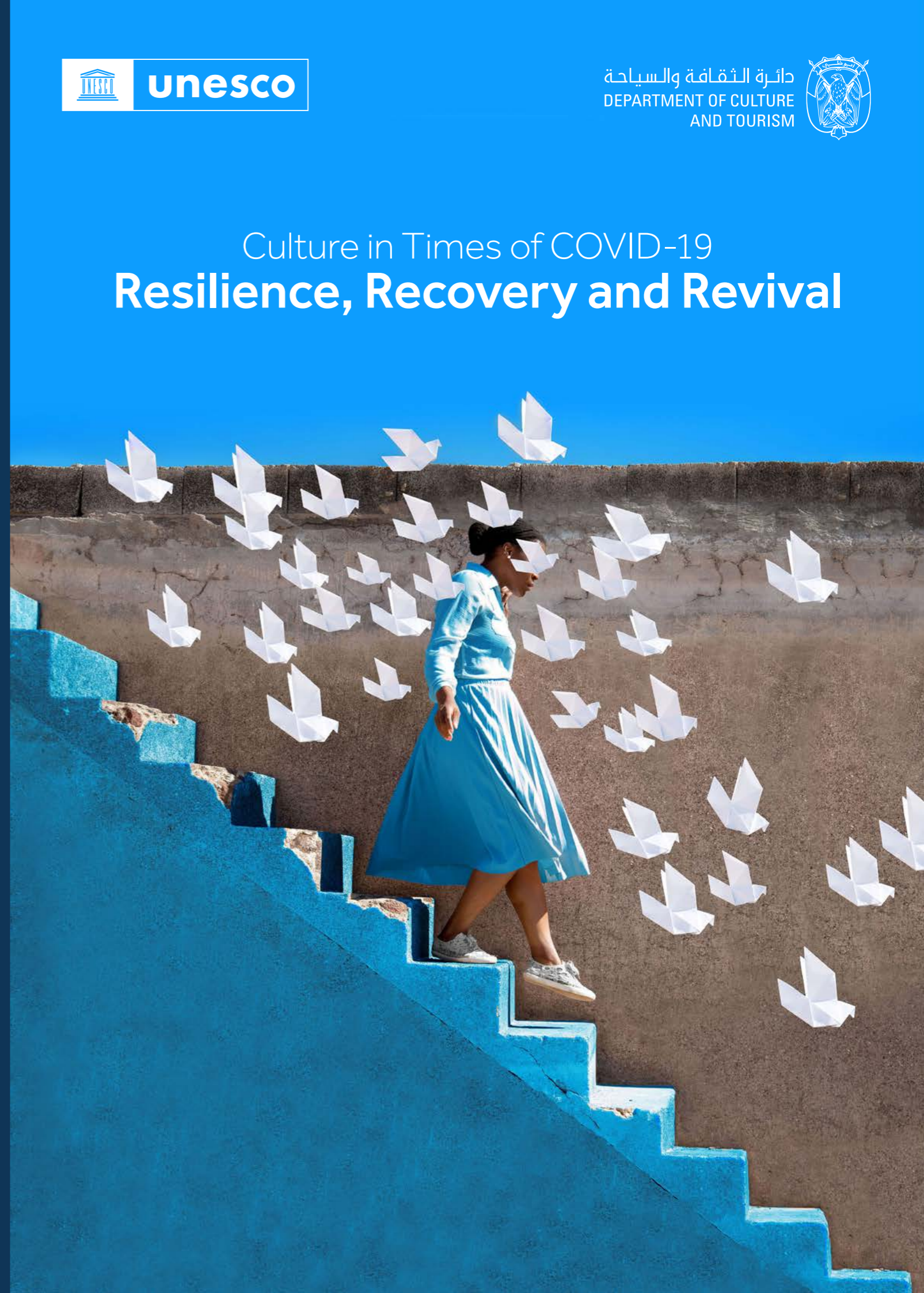


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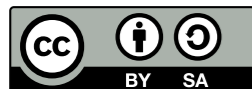


Culture in Times of COVID-19 Resilience, Recovery and Revival

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SHORT SUMMARY

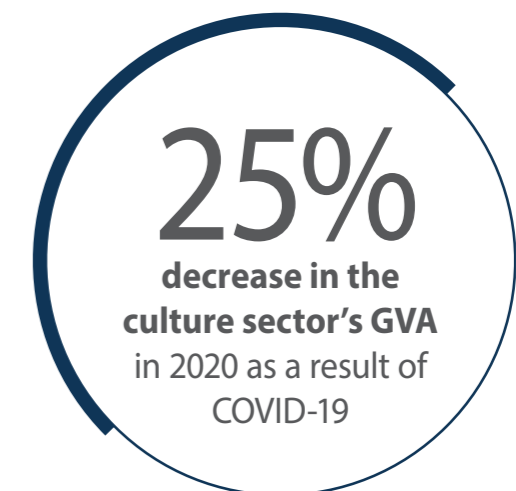
Charting the Recovery of the Culture Sector

The culture sector experienced significant decline during the COVID-19 pandemic, with approximately 10 million jobs lost in 2020 alone and estimated revenue losses amounting to 20 to 40 per cent. In-person cultural experiences witnessed an eightfold greater decline in gross value added (GVA) than the global average for the whole economy, with some subsectors declining 25 per cent overall due to the sharp economic downturn and the public health measures put in place to curb the spread of the virus.

Culture in Times of COVID-19: Resilience, Recovery and Revival offers key insights on trends and structural transformations that can boost the culture sector as a cornerstone of an economy built on sustainability and well-being.

A set of strategic development considerations are put forward for governments and their partners, in both the public and private sectors, to promote the value of culture as a public good, encourage cross-sector collaboration and holistically address the essential needs of the sector, while supporting cultural professionals in adapting to a changing world and providing equal access and opportunities across the cultural value chain.

The culture sector is at a critical turning point, which offers significant opportunity to reframe it as a strategic driver of sustainable development. Momentum should not be lost, and all stakeholders should be mobilized to accelerate the recovery of the culture sector and create a diverse, resilient and thriving sustainable future.



'Since wars begin in the minds of men and women, it is in the minds of men and women that the defences of peace must be constructed.'



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FOREWORD

The impact of the COVID-19 pandemic has marked a decisive transition in our societies. The dramatic loss of human life, damaging economic impact and pressing consequences of physical distancing measures and isolation, as well as the long-lasting effects of school closures and the overall disruption to lives and livelihoods, will require us to rethink our current models and imagine more sustainable and resilient pathways for the future.

Within these wider realities, the impact of COVID-19 on the culture sector has been greater than on almost any other sector, challenging the entire cultural ecosystem during the past two years. Structural flaws and fragilities that plagued the sector prior to the crisis have been amplified and the extent of their impacts increased exponentially by the pandemic. Many artists and cultural professionals have lost their livelihoods, pre-existing inequities have been deepened – including for women and girls – further amplifying social and economic insecurities. These impacts have brought leading decision-makers and cultural professionals to further rely on the social and economic role of culture as a road to recovery.

The unprecedented global reach of the ongoing crisis requires coordinated multilateral cooperation at the regional and global levels. In this light, UNESCO and the Department of Culture and Tourism - Abu Dhabi (DCT) have come together to chart a roadmap for a holistic and integrated approach to support the sector's sustainable and inclusive revival. Providing a first analysis of the impact of the pandemic on the culture sector as a whole, spanning all regions and cultural domains since March 2020, Culture in Times of COVID-19: Resilience, Recovery, Revival reveals the major trends reshaping the sector and identifies pivotal responses to these changes. The report will be presented at the Culture Summit Abu Dhabi in May 2022 which, under the theme A Living Culture, will be instrumental in stimulating reflection on the potential of collectivity, as well as the need to cultivate cultural ecosystems and embrace culture as a lived experience.

We have before us a unique opportunity for lasting change in the culture sector. Major reforms that defy traditional assumptions and practices are currently emerging around the world. The challenge will be to sustain these reforms and innovations when a return to some greater predictability in our lives and communities takes hold. We must ensure that we do not revert to old patterns and to the familiar and flawed assumptions and models of the past, which have exposed just how fragile our creative ecosystems are.

Policies, measures and initiatives that help to maintain and drive further transformation will be critical. The aim of this report is to provide lines of inquiry to inform dialogue, reflection and decision-making, and to inspire policy-makers and stakeholders to develop conducive conditions to enable a diverse, thriving and resilient culture sector.

As the world turns to the next cultural benchmarks: the next G20 Ministerial Meeting on Culture and MONDIACULT 2022, which will take place respectively in Indonesia and in Mexico in September 2022, we must leverage the growing momentum to reimagine cultural policies and launch a new dialogue on the future of the culture sector.

For UNESCO and DCT, this report represents the continuation of an ongoing collaboration on a series of strategic initiatives that support a joint commitment to advancing culture as a public good and protecting and promoting the diversity of cultural expressions to achieve sustainable development goals by 2030 and beyond.

**United Nations Educational, Scientific and
Cultural Organization (UNESCO)**

**Department of Culture and Tourism -
Abu Dhabi**

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SUMMARY

The COVID-19 pandemic has affected billions of lives across the globe. In addition to the devastating loss of life and the impact on health care systems, it has brought economic hardship to almost every area of the world economy. In the culture sector, many artists and cultural professionals have lost their livelihoods, while cultural organizations and institutions have faced prolonged disruption to their operations.

The pandemic has exposed the structural fragility of the cultural sector at every level and exacerbated pre-existing inequalities. It has thrown the sector's fault lines – the result of long-term policy failures – into sharp relief. For too long, governments understood and valued the culture sector primarily for the role it plays in economic growth, often ignoring the sector's other contributions, including to social well-being and to sustainable development. This report describes the direct link between these policy failures and the current perilous condition of culture across the globe. It reflects on the wide-ranging challenges facing the sector, which have been exacerbated by the pandemic. Finally, it calls for a reframing of the ways in which culture is valued and supported, arguing that culture is foundational for a more inclusive, ethical and sustainable future.

The impact of COVID-19 on the culture sector has been devastating by any measure. While the total gross value added (GVA) of the global economy declined by 3 per cent in 2020, the global culture sector's GVA declined by 8 per cent. If focusing solely on culture sector domains reliant on in-person experiences, the sector's GVA declined by 25 per cent, an eightfold greater decline than the global average for the whole economy.¹ All regions have seen either a decline or a dramatic reduction in the pre-pandemic rate of growth. In Latin America and the Caribbean, the culture sector experienced an estimated 13 per cent decline in GVA in 2020, while the Arab States region saw a slow growth of 1.5 per cent over the same period.

COVID-19 has had a significant impact on the revenues of cultural professionals and institutions, with governments estimating losses in the range of 20 to 40 per cent.² It resulted in 10 million job losses in 2020 alone, with individuals on short-term contracts and project-based work being hardest hit. The closure of cultural venues and physical distancing restrictions put in place to curb the spread of the disease resulted in the cancellation, postponement or transformation of a great number of physical productions and performances, transmissions of living heritage and cultural practices, celebrations and festivals, and residencies and exchange activities. The process of re-opening has been slow, uneven and expensive. Ongoing short-term challenges include limitations on capacity for events, sanitary measures, staff sickness and a reluctance from some audience segments to return to cultural venues.

Broader shifts are also evident in the cultural value chain, from production to consumption, and in distribution to access. In particular, the culture sector has seen its digitization accelerated by the COVID-19 pandemic, especially in the Global North. In 2020, income from royalties and digital channels reached US\$2.7 billion globally, and this income now makes up over a quarter of all revenue for the sector. This evolution has largely been driven by video-on-demand (VoD) and streaming services. The heritage sector has also embraced digital technology, exploring new ways to deepen and diversify access to both tangible and intangible cultural resources. Many museums are remodelling their approach to the presentation of collections, co-curating digital exhibitions with other institutions, diversifying online content and channels, and delivering services such as education through digital platforms. The digital environment has allowed festivals to maintain a connection with their audiences and broaden their reach, from broadcasting archival material online to producing live digital events.

“Over the past few years, national sustainable development planning has recognized the cultural and creative sectors as levers to advance cultural, social and economic outcomes. However, the transversal role played by culture and creativity in sustainable development, including for the environmental transition, remains widely underinvested.”

UNESCO 2022

However, while digitization has transformed cultural practices and opened new opportunities for some stakeholders, its impact has been uneven across the culture sector. There are major gaps in capacity, expertise and confidence between organizations large and small, by geography and cultural domains, from heritage, visual arts and books to audiovisual and interactive media, creative services, and design. The accelerated digital transition catalysed by the pandemic has exacerbated digital inequalities, further marginalizing the cultural actors and audiences that lack the resources, capacity or connectivity to embrace digital means to produce, distribute and access cultural content, and has widened the digital salary gap.

Amid all this change, there is evidence that grassroots organizations, emerging artists and cultural professionals outside of the mainstream have struggled to claim their place in a transforming cultural ecosystem, which poses a grave threat to the diversity of cultural expressions. Many cultural professionals, in particular independent artisans, women artists and artists belonging to minority or disadvantaged groups, have not been able to sustain their crafts and livelihoods, causing them to leave the field altogether.

The culture sector's responses to the consequences of COVID-19 are complex and nuanced. For every innovation or story of resilience, there are examples of unequal opportunities and talent loss. Yet, within this complex and still developing picture, five core trends are becoming apparent:

1. **Enhanced emphasis on the culture sector's social value.** The social outcomes of culture have come to the fore, evidenced by the ways in which culture is understood and valued by communities (a demand-side perspective) and the recognition of the essential contribution of cultural participation to communities' well-being. Cultural professionals and organizations are articulating their social value and calling on governments to back culture as a public good and as a foundation for more inclusive and sustainable societies based on the full exercise of cultural rights. Building a new value proposition more heavily weighted towards the social impacts of culture may steer the sector towards more collective approaches to policy and investment, strengthening cooperation with ministries and entities with mandates in areas such as education and health. This new value proposition for culture must prioritize equality of access and participation across every part of the cultural ecosystem. Central to this will be the promotion of gender equality, boosting representation, supporting equal rights and nurturing the emergence of a diversity of cultural expressions.
2. **Growing awareness of the importance of ensuring the livelihoods of artists and cultural professionals.** While many governments, non-governmental organizations (NGOs), foundations, and private enterprises provided assistance to artists and cultural professionals in the form of culture sector-specific relief programmes during the pandemic, there are growing concerns about the systemic issue of precarious employment modalities in the culture sector. This precarity, which pre-dates the pandemic, is especially acute for individual artists, freelancers and micro-organizations and enterprises, and affects their capacity to access relief programmes and to ensure the necessary cash flow to withstand crises such as the COVID-19 pandemic. The pandemic also exposed existing inequalities in remuneration, access to social and economic benefits (for example, pensions, childcare, unemployment benefits and access to health care) and access to resources such as digital infrastructure or social capital. The interruption

of activity due to the crisis has led to greater economic hardship for women, who generally work in more precarious and lower-paid jobs than men. In addition, the imposed lockdown increased the exposure of women to gender-based violence, including online violence, harassment and discrimination. Consequently, the culture sector is today less equal and less diverse than before, with pre-existing inequalities having been exacerbated across the entire ecosystem.

3. **Rise of collaboration and increased sectoral solidarity.** The COVID-19 pandemic required distinct parts of the culture sector to work together with a new sense of urgency and shared purpose. There are many examples of cultural organizations making a joint case to governments for investment and support; of larger cultural organizations and established artists reaching out and offering support to independent and emerging artists; or of the creation of knowledge exchange channels to share information about coping mechanisms, tactics and strategies to survive the pandemic. There are also examples of artists and cultural professionals self-organizing to share knowledge, survival tactics and build a collective voice in response to perceived neglect by governments and civil society. These various collaboration modalities, while emphasizing the structural challenges facing the culture sector, have not only re-energized sector solidarity, but also reinforced a shared vision about the role and value of culture in society.
4. **Accelerated adoption of digital practices and techniques.** The pandemic has accelerated digital transformation across many parts of the sector, though access to digital resources remains uneven. While new technologies have increased the range and relevance of some parts of the cultural ecosystem, they can also pose a threat to the viability of other parts of the ecosystem, especially in the absence of enlightened and effective policies and support mechanisms to enable the whole cultural ecosystem to leverage the opportunities offered by a rapidly evolving technological landscape.

5. **Adaptation of strategic, operational and business models and practices across the value chain.** Organizations, artists and cultural professionals have reimagined the ways in which they create, produce and distribute cultural and creative content, with many now questioning the long-term viability of their pre-pandemic models and practices. This is a moment of hyper-innovation, with a new generation of approaches to cultural production and consumption that include the use of blockchain, immersive and interactive technologies and increasingly cross-art-form and cross-sector (transdisciplinary and transmedia) approaches to creation. Nonetheless, excitement at such technological, creative and innovative progression must be tempered by the inequalities that it can introduce or exacerbate.

A close assessment of these trends sheds light on the need to drive structural change in the culture sector to ensure its long-term viability and sustainability. This report presents framework of priority areas (presented in Figure 1 below) that could help support the recovery of the culture sector as the world emerges from the COVID-19 pandemic, while positioning it to play a foundational role in social and economic renewal and in building a sustainable future in line with the aspirations of the United Nations' 2030 Agenda for Sustainable Development.

1. **Guaranteeing the socio-economic status of artists and cultural professionals in the wake of the pandemic.** The immediate economic survival of artists and cultural professionals is at stake in the short term. Over the medium and long term, lessons from the pandemic could inspire a systematic sectoral transformation, including: guaranteeing more stable working conditions; enhancing social and economic protections; ensuring fair remuneration; reducing mobility barriers; safeguarding freedom of artistic expression; and developing skills and career development opportunities. These efforts should be buttressed by appropriate policies, regulatory frameworks and initiatives to promote and protect the status of artists and cultural professionals, in line with the

Figure 1:

Five key action areas to accelerate COVID-19 recovery and support the development of a thriving and resilient culture sector



provisions of pertinent standard-setting instruments, including UNESCO's 1980 Recommendation concerning the Status of the Artist and the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions. This latest report also sheds light on the need to protect and ensure cultural rights for all, particularly in the face of the detrimental impact of the COVID-19 pandemic on artistic freedom.

2. **Building evidence-based support for the culture sector's recovery, growth and contribution to long-term sustainable development.** The COVID-19 pandemic has highlighted major gaps in data related to the culture sector, including information on artists and cultural professionals, royalties and copyright, employment figures, accurate GDP contributions and audience consumption patterns. It has also revealed a systemic lack of gender disaggregated data as well as an imbalance in data availability in different regions,

with greater data lacunas in the Arab States region and Africa. Establishing shared practices and platforms can assist data creation, collection, harmonization and synthezation efforts across a broad set of stakeholders and help to support evidence-based decision-making. Better data collection and improved data transparency can also help better demonstrate the impact of culture across a range of outcomes, including the United Nations' Sustainable Development Goals (SDGs), thereby enabling the sector and partners to move away from pure economic indicators towards a wider value proposition. Improving capacities on the ground at the local and national levels to collect and consolidate data on culture remains a priority.

3. **Harnessing technological change to support innovation and facilitate a diversity of cultural expressions.** As the sector recovers from the impacts of the COVID-19 pandemic, addressing the digital gap

through participatory and intersectoral approaches will be critical to maintaining and promoting a diverse, vibrant and inclusive culture sector. Equal access to and participation in the global digital transition will be essential to maintain a diversity of cultural expressions. To accelerate recovery and ensure the entire culture sector benefits from this shift, interventions will be required to help bridge the digital divide, not just in terms of internet access and infrastructure, but also in digital literacy and skills development, as well as significant gaps in income derived through digital technologies. This process will also require the development of public policies aimed at harnessing the opportunities of digital technologies for the consumption and distribution of culture. It will also need to support cooperation in the production of cultural content, as well as adopting regulations and implementing measures to support fair remuneration and promote diverse and local content, including copyright and intellectual property legislation.

4. **Reshaping cultural policies and promoting sectoral collaboration and participation, building on increased sector solidarity and exchange.** There is a growing need to build an ecosystem-wide approach for culture. With the support of public authorities, civil society and the private sector, cultural organizations and cultural professionals can further strengthen their collective value and resilience by pooling knowledge, resources and funding, and by engaging with the full diversity of artists and other stakeholders across the cultural ecosystem. This generates opportunities to improve participatory governance mechanisms and working models on a broader scale, making for a more sustainable, inclusive and resilient cultural ecosystem overall.
5. **Crafting a new value proposition for culture as a foundation for a more resilient and sustainable social, economic and environmental future.** The COVID-19 pandemic has shifted the way in which culture is understood and valued. This change in public perception presents an opportunity to reframe policy

approaches to the culture sector, positioning it as a universal public good, ensuring cultural participation for all as a prerequisite for human dignity and well-being, and promoting culture as a pillar for the achievement of the 2030 Agenda for Sustainable Development. Policies and regulatory frameworks need to ensure that informal cultural work is not marginalized or overlooked and must identify solutions to support its transition to the formal sector through tangible incentives. Governments may decide to back culture to introduce new ideas, technologies and methods which empower communities, give hope and catalyse our collective renewal, as well as build resilience against future crises.

There is more at stake than merely supporting the sector's recovery. Cultural diversity and the diversity of cultural expressions – of crucial importance to our individual and collective heritage, our creative wealth, social cohesion and economic recovery – hang in the balance. The COVID-19 pandemic has precipitated an emergency for the culture sector. The closure of museums, cultural sites and institutions; limitations on festivals, concerts, and ceremonies; the weakened socio-economic conditions of artists and cultural professionals; and the accelerated digitization of the sector have plunged culture into a distressing state of uncertainty. These events particularly threaten the capacity of independent creators and practitioners, the lifeblood of cultural diversity, to remain in the sector.

More than two years after the start of the COVID-19 pandemic, it is essential to assess its social and economic impacts, reflect on the challenges and opportunities it has created, and determine how to support the sustainable recovery of the culture sector. This report provides insights on the impact of the COVID-19 pandemic on the culture sector and outlines a way forward built on the premise that culture should be central to a new paradigm for socio-economic development.

INTRODUCTION

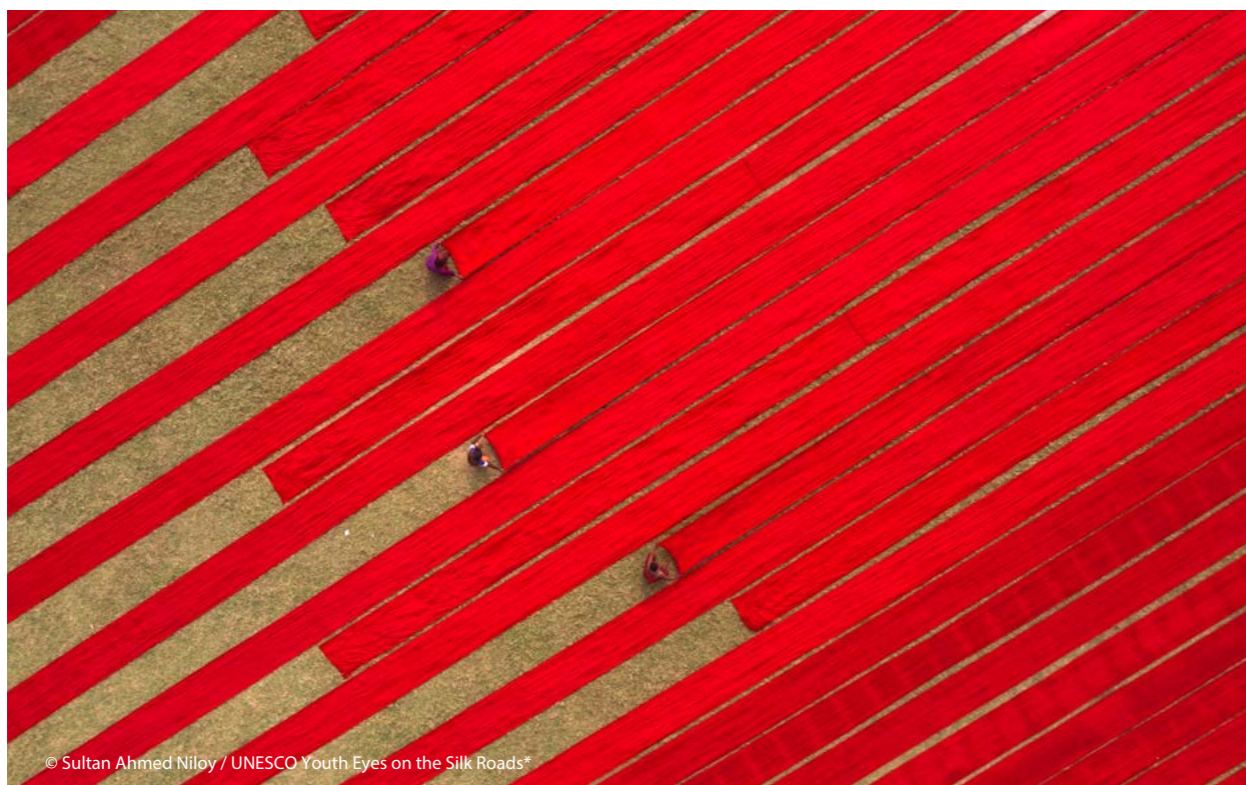
The COVID-19 pandemic has had a devastating impact on lives and livelihoods around the world. It has led to a tragic death toll and presented an unprecedented challenge to public health, the continuity of daily life and the world of work. It has required everyone – from governments to individuals – to re-assess and reframe how we live our lives.

It has also provoked all of us to consider what we value and prioritize. For many people, it was culture that provided a source of connection and comfort, and culture that was most missed during various stages of ‘lockdown’. The culture sector has shown enormous resilience and a capacity for innovation, adapting across the value chain from how cultural expressions originate to how they are distributed and consumed by audiences.

Yet, the culture sector was among the first sectors to shut its doors and experienced some of the steepest decline during the pandemic. The resurgence of COVID-19 due to the emergence of the Omicron variant at the end of

2021 further deepened the crisis and brought a renewed period of uncertainty for the culture sector. Despite ongoing challenges, the culture sector has demonstrated that it can play a central role in societal and economic renewal in every region of the world. In order to fully actualise the culture sector’s potential, however, it is essential to address the systemic inequalities and fault lines exposed by the pandemic.

Preliminary studies on the impact of the COVID-19 clearly demonstrate that it has had a deleterious impact on the capacity of artists to develop and sustain their practice, and that this impact was more acute on artists and cultural professionals belonging to minority or disadvantaged groups, including women – due to existing gender inequalities and pay gaps, as well as the increased burden of unpaid care. Yet, artists and cultural professionals of all backgrounds have found innovative ways to withstand the crisis and have laid the groundwork to rebuild the sector and re-imagine its governance.



Effective governance and investment frameworks can capitalize on the innovations that have emerged during the pandemic to ensure that artists, cultural organizations and the wider cultural ecosystem flourish for the benefit of all society. The time has come for a new cultural paradigm; one that values artists, cultural professionals and diverse cultural expressions as integral parts of healthy societies and that invests in culture as a global public good. Culture, in all its diversity, can be a stepping stone to rebuild the foundations of a sustainable and inclusive future.

Past policy frameworks and investment models for culture have faced challenges in delivering a sustainable model for the cultural ecosystem. The arrival of COVID-19 exacerbated these challenges. Attempts to ‘rescue’ culture through emergency funding provided temporary relief, but also demonstrated a systemic underestimation of the sector’s value as a source of social cohesion, well-being, growth and resilience. Going forward, culture can be understood as a foundational element for sustainable societies that foreground well-being, inclusion and prosperity.

UNESCO, as the only United Nations agency with a specific mandate in the field of culture, has a paramount responsibility to convene stakeholders across the different policy domains, bringing together policy-makers, experts and professionals to leverage the power of its normative and standard-setting instruments to stimulate global reflection on the future of the sector. For its part, the Department of Culture and Tourism - Abu Dhabi (DCT) drives the sustainable growth of Abu Dhabi’s culture and tourism ecosystems, fuelling social well-being and economic progress and advancing the vision of the emirate as a global, inclusive and sustainable cultural capital.

For this reason, UNESCO and DCT have come together to provide a first global assessment of the impact of COVID-19 across all cultural domains since March 2020, to identify the major global trends reshaping the sector and to outline directions for its revival. Using data from more than 100 industry reports and 40 expert interviews, this report highlights innovative examples of policies and measures implemented to support the culture sector

during the pandemic and argues that this crisis offers a unique opportunity to reframe how culture is valued and thus supported.

Grasping the global momentum to reposition culture in public policies

The wide-ranging impact of COVID-19 has sparked a greater recognition of the value of culture. In 2020, culture was included in the policy discussions of the G20 for the first time, as Ministers of Culture met under the presidency of Saudi Arabia. It has also been possible to observe increasing recognition of the economic impact of culture by international and regional development banks, particularly with regard to the cultural and creative industries and cultural tourism linked to cultural heritage and museums. The pandemic has clearly underlined the importance of global policy dialogue on culture to address the impacts of the pandemic, stimulate the sector’s recovery and rethink its governance to ensure its future resilience. The impact of the pandemic has also highlighted the need to regenerate the foundations of multilateral discussions by putting the spotlight on culture as a universal public good, and underlined the necessity to establish a permanent, international forum to debate cultural issues.

Learning from the lessons of the ongoing pandemic, governments may choose to support the culture sector’s evolution towards more resilient, sustainable and inclusive models, echoing the vision of the United Nations’ 2030 Agenda for Sustainable Development. Multi-level governance models will be key in this process, with local governments playing a particularly important role. Participatory approaches should underpin the development, implementation and monitoring of cultural policies, ensuring the full and active participation of civil society.

The culture sector could benefit in future from a more robust integration of culture across the policy spectrum. The pandemic has exposed and, to some extent, amplified global development challenges, including social and economic inequalities, while reshuffling public and

private priorities. At this crucial turning point, it is essential to recognize the potential of the culture sector to fuel societal renewal and transformation across all development objectives, including education, health and well-being.

This report builds upon the achievement of the previous editions of the Culture Summit Abu Dhabi and the legacy of the 1998 Stockholm Intergovernmental Conference on Cultural Policies for Development and comes 40 years after the first MONDIACULT World Conference on Cultural Policies held in Mexico City, Mexico, in 1982. This report reiterates the importance of a global perspective on cultural policy development and paves the way for the 5th edition of the Culture Summit Abu Dhabi in May 2022 and the UNESCO World Conference on Cultural Policies and Sustainable Development – MONDIACULT 2022 in September 2022.

A global and holistic overview

Above all, this report seeks to provide a strategic outlook on key areas to be addressed at the policy level to rebuild a stronger culture sector. It aims to inform dialogue, reflection and decision-making by charting a path to accelerate the sector's recovery and, most importantly, to support the development of a diverse, thriving and resilient culture sector.

Chapter 1 provides a brief overview of the major global consequences of COVID-19 and identifies the main ways in which these consequences impacted the culture sector. The scale of the culture sector's economic decline is examined and contextualized across regions and domains.

Chapter 2 analyzes the five key trends that together define how the culture sector responded to the consequences of COVID-19. These trends bring structure to the broad range of factors and actions that made a difference to whether cultural organizations and cultural practitioners struggled in the face of the pandemic or were able to harness emerging opportunities.

Chapter 3 presents five key areas of intervention to accelerate the recovery of the sector and spur the development of a diverse, thriving, and resilient cultural ecosystem as a foundation for sustainable development. This chapter argues that a committed and holistic effort is needed across the value chain, with initiatives to harness digitization, improve data collection and analysis to inform decision-making, reshape cultural governance and promote collaboration, improve the socio-economic status of artists and cultural professionals of all backgrounds, and integrate culture into development policies to ensure a resilient and sustainable future.

Throughout the report, a voice is given to stakeholders of the culture sector from diverse geographic regions and cultural domains – their collective words and insights guide the analysis and provide personal perspectives that inform and illustrate the data. Further information about the mixed-methods research methodology employed in the elaboration of this report can be found in Appendix.





CHAPTER

THE FAR-REACHING AND ASYMMETRIC
IMPACTS OF THE COVID-19 PANDEMIC
ON THE CULTURE SECTOR

THE FAR-REACHING AND ASYMMETRIC IMPACTS OF THE COVID-19 PANDEMIC ON THE CULTURE SECTOR



The COVID-19 pandemic has impacted all of the processes and activities in the culture sector, including the creation, production and distribution of cultural expressions and access thereto, as well as the preservation and promotion of, and access to, cultural heritage. However, the diversity of the culture sector – across domains, geographies and roles – means that this impact was not uniform. This chapter breaks down the social and economic consequences of the COVID-19 pandemic on the culture sector and identifies the key areas of impact.

Figure 2: Main consequences of the pandemic and their impacts on the culture sector

CONSEQUENCES OF THE COVID-19 PANDEMIC

- Sharp economic decline
- Restrictions on in-person activities
- Limitations on mobility

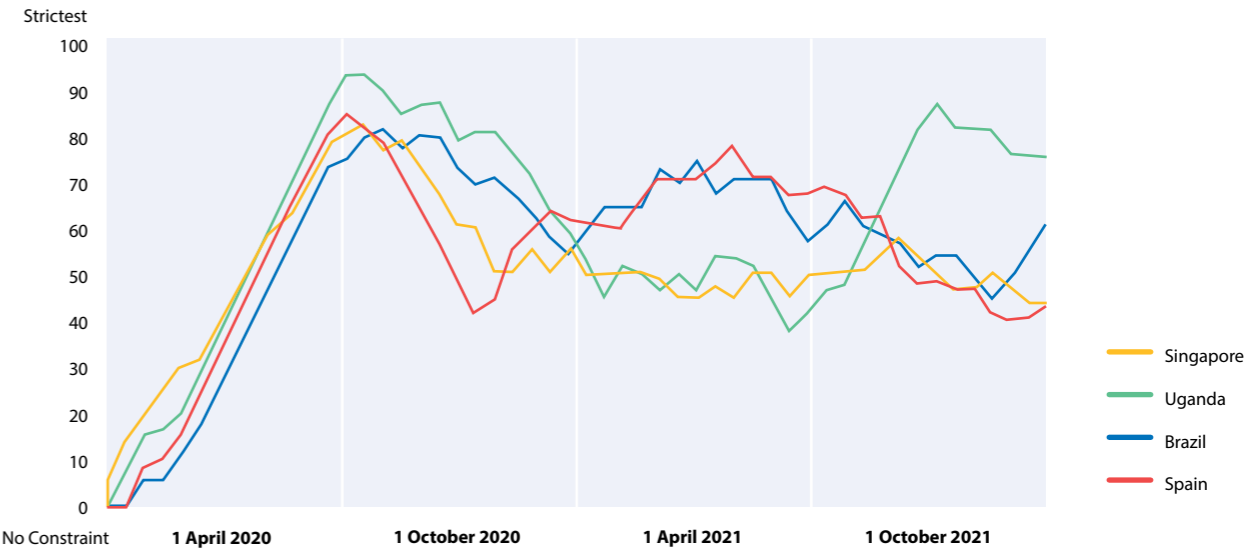
IMPACT ON THE CULTURE SECTOR

- Weakened traditional revenue streams and funding
- Disruption to jobs and livelihoods
- Disruption of the culture sector value chain
- Increased at-home consumption of cultural activities
- Negative impact on diversity of cultural voices and access to cultural work

Beyond its devastating impact on public health, the most significant global consequences of the COVID-19 pandemic have been a sharp economic decline, restrictions on in-person activities and limitations on mobility.³ Global GDP dropped in the first and second quarters of 2020, reflecting a dramatic slowdown in economic activity. World Bank data indicates that the pandemic reduced global economic growth in 2020 by 3.4 per cent, despite growth projections of 3.3 per cent at the beginning of the year.⁴ Consequences included supply chain constraints and lower consumption due to high inflation and increasing costs, as well as a significant public debt explosion.

Starting in late 2019, in-person activities in countries around the world have also been limited by measures aimed at reducing the spread of the virus, such as school and workplace closures, restrictions on gathering sizes, testing and vaccination policies, and contact tracing. Such measures have had a profound impact on businesses and society, changing not only how people work – as seen by the increase in people working from home – but also how and where they socialize. During certain periods, in some countries, people have been confined to their homes, while restaurants, theatres, museums, sporting events, cinemas and non-essential shops were temporarily closed or had to operate at limited capacity. While the strictness and length of such measures varied around the world, life has not returned to normal in any region at the time of writing, and major restrictions remain in place in many countries (Figure 3).

Figure 3: Variation in global containment measures⁵
Source: Oxford COVID-19 Government Response Tracker from Oxford Economic



The closure of public transport, mandates to stay at home and continued restrictions on international travel – including vaccination and testing requirements as well as travel bans – have severely limited mobility within communities and countries, as well as across national borders. These restrictions have impacted significant areas of activity in the culture sector, hampering traditional transmission modalities of living heritage, as well as severely limiting cultural tourism activities, including visits to museums and heritage sites and participation in live events and festivals. According to data from the United Nations World Tourism Organization (UNWTO), destinations worldwide welcomed 1 billion fewer international arrivals in 2020 compared to 2019.⁶ UNWTO scenarios predict that international tourist arrivals could grow by 30 to 78 per cent in 2022 compared to 2021, after a 71% decline in 2021 with respect to 2020. However, this would still be 50 to 63 per cent below pre-pandemic levels.⁷

1. THE CONSEQUENCES OF THE PANDEMIC ON THE CULTURE SECTOR

1.1 Disproportionate and uneven economic impact across the culture sector

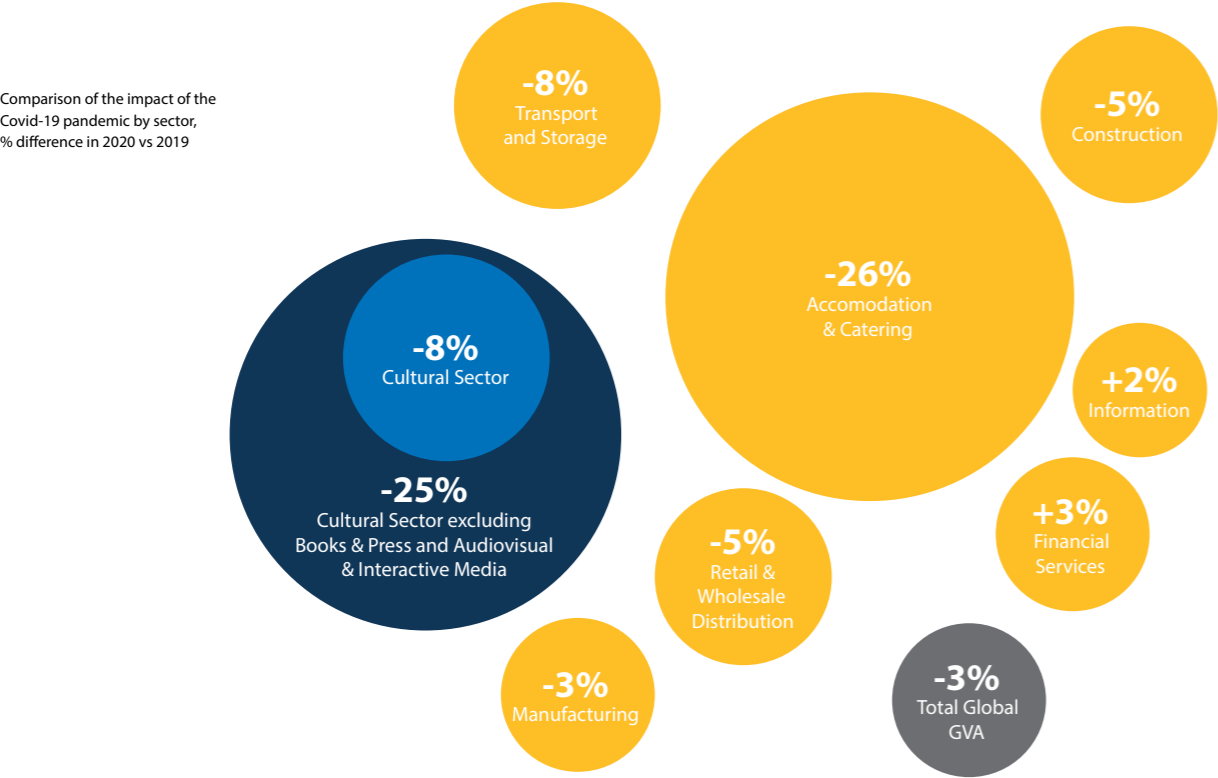
The socio-economic consequences of the pandemic have had a disproportionate impact on the culture sector, which experienced a steeper decline than almost every other sector, although the effects were felt unevenly across regions and domains.

This economic impact of the pandemic on the culture sector is evidenced by the decline in the latter’s gross value added (GVA) – a good lens through which to compare the sector to others, as well as to compare across regions. During 2020, total GVA of the global economy declined by 3 per cent. Over the same timeframe, the global culture sector’s total

GVA declined by 8 per cent. Only the accommodation and catering sector showed a greater decline in GVA.⁸

To fully understand the impact of the pandemic on the culture sector, however, it is essential to breakdown this data by regions and subsectors. For example, the domains within the culture sector worst affected by the pandemic, namely those with heavy reliance on in-person experiences (cultural and natural heritage, performance and celebration, visual arts and crafts), experienced a 25 per cent decline in GVA, more than double the sector average (Figure 4) and nearly identical to the decline of the accommodation and catering sector.⁹ On the other hand, some sectors, like the streaming industry or the video-game industry, benefitted from people staying at home and experienced significant growth¹⁰.

Figure 4: Per centage change in GVA by sector globally, 2020 vs 2019
Source: Industry GVA from Oxford Economics (accessed in October 2021)

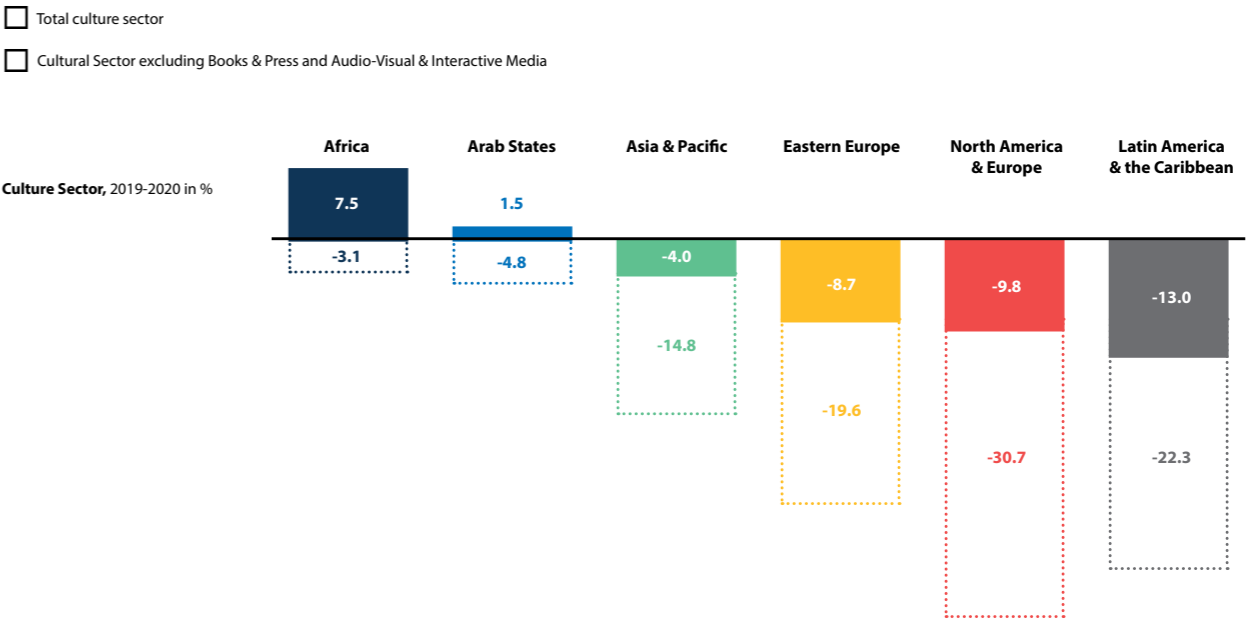


The impact of the pandemic on culture was felt differently across regions. Measured by decline in total culture sector GVA, the hardest hit region was Latin America and the Caribbean, which saw a 13 per cent decline in 2020. If books and press, as well as audiovisual and interactive media are excluded from the data, North America and Europe saw a staggering GVA decline of 30 per cent. Africa’s total culture sector GVA grew by 7.5 per cent in 2020, but this growth was partly led by books, press, audiovisual and interactive media, which were less affected by the pandemic. If those subsectors are excluded from the data, Africa culture sector’s GVA declined by 3 per cent (Figure 5).

The smaller GVA decline in the Arab States region can be principally explained by the fact that the culture sector has seen significant investment by governments since 2017 due to a recognition of culture’s contribution to national economies. These investments contributed to building

more resilience in cultural ecosystems when the pandemic struck. For instance, in the United Arab Emirates, Abu Dhabi’s culture sector GVA doubled between 2013 and 2014. The value-added of libraries, archives and museums sector expanded more than sixfold from 2017 to 2018 and stayed relatively stable in 2020, underscoring the expanding importance of the country’s culture sector in supporting the economy and generating employment, even in the face of crisis.¹¹ This pre-pandemic momentum appears to have somewhat offset the overall negative economic impact of COVID-19 in these regions. Nevertheless, it is important to underscore that the situation in regions that have a largely informal culture sector may not be accurately captured by GVA data.

Figure 5: Per centage change in GVA of the culture sector by region, 2020 vs 2019
Source: Industry GVA from Oxford Economics (accessed in October 2021), IHS Markit (accessed in October 2021)



1.2 COVID-19 through a cultural lens: Five major impacts

The GVA data presented above offers a snapshot of the overall and uneven decline in the economic output of the culture sector. Underpinning this economic decline are far-reaching and multi-faceted consequences for cultural organizations, artists and cultural professionals around the world, which can be summarized in five main categories:

1. Weakened traditional revenue streams and funding
2. Disruption to jobs and livelihoods
3. Disruption of the cultural and creative value chain
4. Increased at-home participation in cultural activities
5. Negative impact on diversity of cultural voices and access to cultural work

1. Weakened traditional revenue streams and funding

Governments estimate that global revenue losses for the culture sector during the pandemic are in the range of 20 to 40 per cent.¹² In Latin America and the Caribbean, over half of all culture sector organizations experienced a decrease in revenue of more than 80 per cent in 2020, and only 12 per cent registered no decline.¹³ In Malaysia, a 2020 survey of culture organizations and professionals undertaken by CENDANA (the Cultural Economy Development Agency), found that almost 70 per cent of respondents expected to lose most or all their income over the rest of the year.¹⁴

The revenue streams that were most affected were those

Global revenue losses for the culture sector during the pandemic are in the range of

20-40%

that relied heavily on in-person experiences and/or on local and international mobility – both of which were restricted to various degrees in most countries during the pandemic.

Cultural domains heavily dependent on tourism suffered particularly severe revenue losses. For example, the Network of European Museum Organizations (NEMO) estimated losses of 75 to 80 per cent for museums in tourist regions in 2020.¹⁵ Cultural venues and World Heritage sites have been deeply affected by lockdowns and travel restrictions, resulting in a 66 per cent reduction in visitor rates to World Heritage sites in 2020,¹⁶ and an average 70 per cent drop in attendance to museums and a 40 to 60 per cent decline in revenue compared to 2019.¹⁷ Additionally, art galleries, auction houses, bookshops and publishing companies suffered financial losses due to scheduled festivals, fairs and live events that were non-refundable to the organizers after cancellation or postponement.¹⁸

We are required to raise funds outside of the money we receive from the Government.

But it was very tough; we could not get anything, because every company was holding back from sponsoring anything.

Alessandra Serra, Executive Director of the Bahia Symphony Orchestra, Brazil

The sharp economic decline caused by COVID-19 led to heightened concerns about funding, both public and private. Access to public financing has been challenging due to shifts in public priorities. While some culture sector organizations benefited from risk-relief expenditure from governments, the majority saw a decrease in funding. According to UNESCO's report on World Heritage, 30 per cent of 388 survey respondents reported decreased public subsidies during the pandemic, while only 14 per cent reported an increase. A large share of World Heritage sites in Africa (44 per cent), the Arab States (79 per cent), and Latin America and the Caribbean (68 per cent) experienced decreased subsidies, while some World Heritage sites in Asia and Pacific (16 per cent), and in Europe and North America (21 per cent) reported increased subsidies.¹⁹



The pandemic has made many artists and cultural professionals more reliant on non-traditional sources of income, particularly revenues from content streaming platforms. In the music sector, for instance, the arrival of the COVID-19 pandemic in 2020 saw an 18 per cent increase in streaming revenue against a 75 per cent drop in live music revenue.²⁰ However, reward remain limited, as revenues are distributed among a growing base of rightsholders, with only a small portion going to individual creators. French music society SACEM reported that, in its July 2021 distribution, members saw revenues 14.4 per cent lower than the previous year. The entertainment, cinema and public address sectors recorded the largest decreases, while digital rights increased significantly. Excluding online rights (downloads, streaming audio and video), the fall in revenues has reached up to 24.6 per cent. Despite the disparate impact of COVID-19 on publishers, a large share has experienced an average decrease of more than 50 per cent in revenue.²¹

At the same time, growing exposure to online piracy and relatively weak regulatory environments limit fair income opportunities for artists who make their content available

I think artists didn't get the chance to raise money during the pandemic because we don't have this culture to go online and pay to listen to music or to see live music. They will go when it's for free. So some artists were actually doing a lot of live-streamed music but they were not gaining money from it.

Aisha Dème, co-founder and former Director of agendakar.com in Senegal

online.²² In Guinea, for example, despite a reform of the country's copyright law in 2019, authors in the music industry continue to bear losses of income estimated at over 50 per cent due to piracy.²³

Traditional revenue streams such as heritage and cultural site visits, ticket sales for concerts, festivals and performances, and access to public and private funding were severely weakened during the pandemic. While a number of cultural organizations, artists and cultural professionals turned to alternative sources of revenue to offset their losses, digital platforms have not fully replaced revenue otherwise generated through physical transactions. In addition, large parts of the culture sector lack the digital connectivity, capacity or opportunity to exploit digital or non-traditional revenue streams, and therefore struggled to make ends meet during the COVID-19 pandemic. This led many institutions to close their doors and many artists to leave their chosen field of activity.

2. Disruption to jobs and livelihoods

The weakening of traditional revenue streams has had a direct impact on jobs and livelihoods in the various culture sub-sectors, disrupting cultural employment and affecting the careers of millions of individuals around the world.

US\$750B
Decline in the cultural and creative industries' global GVA corresponds to
10M Job losses in the culture sector across the world

An estimate of the impact on jobs in the cultural and creative industries can be derived from the fall in the sector's overall economic output. The estimated US\$750 billion decline in the cultural and creative industries' global GVA corresponds to upwards of 10 million job losses in the culture sector across the world in 2020. Individuals on short-term contract and project-based employment were most affected, while permanent jobs in big public organizations appear to have been insulated from the worst impacts, in part due to 'rescue funding' from governments and NGOs that enabled these organizations to pursue their activities.

In the film industry, most professionals are freelance. Besides those working for a few big companies, most of these professionals are project-based, with comparatively low job security. The most challenging part was to keep the skillful, trained professionals in the film industry so that they would not leave the industry forever.

Yoonhyung Jeon, Senior Researcher at the Korean Film Council in the Republic of Korea

Many cultural jobs are in the informal sector and rely on self-employment, which has made them particularly vulnerable to the impact of the pandemic. A study focusing on Latin America reported that 64 per cent of freelancers in the culture sector had lost more than 80 per cent of their income in 2020. In Ecuador it is estimated that 89 per cent of workers in the culture sector lost income, while 68 per cent of culture sector freelancers in Kenya do not have the resources to withstand economic shocks. In the United Arab Emirates, the Ministry of Culture and Youth reported that only 13 per cent of businesses and 9 per cent of freelancers were reported as making a profit in 2020, with those able to use digital technology to reach new customers and audiences more likely to generate income. In an interview for this report, Mohannad Al-Bakri of the Royal Film Commission of Jordan reported that 60 to 70 per cent of freelancers in the Jordanian film industry were out of work or had substantially less work during the pandemic.

However, not all freelancers have suffered. In a few domains, such as audiovisual and interactive media, including videogames, there has been a reported increase in freelancer engagement.³⁰

Overall, the pandemic has led to a significant loss of networking, funding and other development opportunities, notably because of the cancellation or postponement of a large number of residencies, cultural events, markets and

fairs, exhibitions, festivals and live performances, as well as the impact of travel restrictions on artist mobility and international touring. According to a survey of more than 774 artists and 359 organizations in 2020, at a national and international level, more than half of all planned residencies had been postponed because of the COVID-19 pandemic, while approximately 20 per cent had been cancelled.³¹ An example is the UNESCO-Nara International Film Festival's joint residency programme, which was planned for 2020 as a two-week immersive experience in Japan for ten young female film professionals from Africa. This had to be postponed to 2022 because of international travel restrictions.

The COVID-19 pandemic has had an even greater impact on artists and cultural professionals belonging to vulnerable groups, including women and youth. The Finnish Arts and Culture Barometer 2020 shows that female artists reported impacts on their artistic work more often (79 per cent) than male artists (69 per cent), while research in the United Kingdom underlines that the film industry saw a staggering 51 per cent fall in the number of female freelancers by the end of 2020, compared to the start of the year (in contrast to a 5 per cent decline for men).³² In Abu Dhabi, already vulnerable women handcrafters, who typically worked in communal handicraft centres, were forced to work from home, jeopardizing their income and financial independence. In addition to financial support, DCT provided the craftswomen with digital tools and platforms to promote and sell their work. These commitments were considered critically important for many local families, especially the single-mother homes that heavily relied on this income for their livelihood.

Gender equality is fundamental to ensuring a genuine diversity of cultural expressions and equal opportunities in artistic work and cultural employment. However, qualitative and quantitative data reveals that women and gender diverse artists and creators continue to face numerous barriers, including unequal access to decent work opportunities, fair remuneration and access to leadership positions. The COVID-19 pandemic has only widened this gap. Women, who hold a higher proportion of precarious jobs in the arts and culture sectors, are particularly vulnerable to social and

As a female artist, especially a female dancer, stage life is very short, you need to go through a long period of perfecting your art in order to reach a mature stage. When this stage is finally attained, the time you have to realize your values is especially precious. With the impact of the pandemic, this precious period is greatly shortened, so I would say the impact of the pandemic on female artists is huge.

Yiran Li, dancer and performing artist from Beijing, China

economic insecurity. A 2020 study shows that women's jobs are 19 per cent more at risk than men's jobs, as women are disproportionately represented in the sectors most affected by COVID-19, which includes the culture sector.³³ While they make up 39 per cent of global employment, women account for 54 per cent of overall job losses. Women's over-representation in hard-hit sectors accounts for their relatively greater employment losses compared with men, while increased care responsibilities limited women's labour force participation during the pandemic and drove many to quit their jobs altogether. If not effectively addressed, COVID-19 could have a regressive effect on gender equality, including in the culture sector.

The COVID-19 pandemic has also had a particularly severe impact on young and emerging artists and cultural professionals: people at the beginning of their career, without access to social capital or established professional networks, without job security, and at the bottom of the pay scale. While the pandemic has mobilized solidarity and coincided with an era of activism – as exemplified by the response to the climate emergency and the Black Lives Matter movement – young artists and cultural professionals find themselves in a position of absolute precariousness at a time when their voices most need to be heard.

3. Strategic, operational and business practices challenges across the cultural and creative value chain

In addition to affecting employment and revenues in the culture sector, the pandemic has a direct impact on the sector's ability to produce and distribute cultural activities and content. Constantly evolving public health measures, especially those involving restrictions on in-person gatherings and international mobility, have significantly disrupted the functioning of the cultural and creative value chain and presented the sector with multiple operational and strategic challenges.

Because tests are very expensive, it instantly increases the cost of production. We have to have tests done weekly and we have to hire a doctor on set. Shooting a crowded Nigerian market scene, for instance, meant testing 300 people in one morning for COVID-19. It [also] doesn't make economic sense to fly an actor in and out, with quarantine, to produce several episodes. Actors testing positive before shooting has also led to scenes having to be re-filmed months later.

Edita Effiong, CEO of Anakle Films in Nigeria

The culture sector has been faced with new production costs, including significant new expenses to cover hygiene equipment and venue control; the introduction of new safety protocols; production delays when key people contracted COVID-19 and had to self-isolate; difficulties in mobilizing international talent; and shipping and logistical challenges to international cultural distribution and exchanges.

Some organizations were able to successfully meet the operational challenges faced by the cultural and creative value

chain during the pandemic. Production in film and television was halted during the pandemic in most countries. Iceland and Abu Dhabi were, however, exceptions. In Abu Dhabi, Image Nation maintained a full production schedule including the filming of a major motion picture with more than 1,000 people on set without a single case of COVID-19, thanks to rigorous testing, social distancing discipline and strong COVID-19 protocols.

Nonetheless, throughout the pandemic, unpredictability has posed a major challenge to all cultural stakeholders, preventing organizations and cultural professionals from planning ahead, and requiring an unprecedented level of flexibility and agility. The Netherlands reopened indoor music venues in June 2021, for example, but two weeks later the government reinstated containment rules, closing venues and cancelling festivals because of a spike in infections.³⁴ And in Argentina, the emerging FID - Festival Internacional de Danza in Córdoba, was forced to suspend its 2020 edition and adapt the work of dancers, choreographers and local producers to celebrate a digital version of the festival.³⁵

Restrictions on in-person gatherings have halted many cultural activities with little forewarning. This unpredictability also had a profound effect on intangible cultural heritage practices, which often rely on in-person transmission and experiences. Closures and restrictions have brought to a halt to or severely limited several traditional practices, with important consequences for the social and cultural life of communities around the world.

Cultural organizations, artists and performers have found pragmatic ways to overcome the operational challenges posed by the pandemic, adapting to survive. Some orchestras and theatre companies have reduced the size of ensembles to provide more intimate environments that are conducive to smaller crowds. Some touring musicians have turned to teaching, often using virtual platforms, as a source of income, while others have taken up freelance or temporary employment in other sectors.

4. Increased at-home consumption of culture

COVID-19 containment measures led to an increased demand for cultural goods and services that could be experienced at home, especially during lockdowns. Since early 2020, the pandemic has seen income from royalties and digital channels reach US\$2.7 billion globally, rising to over a quarter of all sector revenue. This increase has been led by video-on-demand (VOD) and audio streaming. Subscription video-on-demand (SVOD) services are reported to have seen subscriptions rise by 34 per cent in 2020.³⁶ Anghami, the most popular music streaming platform in the Middle East and Africa, became the first Arab technology company to list on Nasdaq, New York in 2022. There was also a 39 per cent global increase in time spent on video-gaming during the COVID-19 pandemic.³⁷ However, most streaming platforms are aggregators, where the business model benefits the technology company or the most popular artists, while emerging or niche artists struggle to raise revenue to levels anything close to that generated by, for example, live performances.

SVOD services
rise by  **34%**

Besides audiovisual and interactive media, other sectors have also started to attract more visitors who access cultural content from home through digital means. In a 2021 study of digital engagement in Washington DC, 62 per cent of the public had engaged with digital content from a cultural institution in the past year – rising to 82 per cent of those with children under 18 living at home. While 36 per cent said they had enjoyed using digital content but expected to stop when they could return to 'the real thing', 49 per cent expected to continue engaging with digital content from cultural institutions, even after the institutions reopened.³⁸ However, increase in at-home consumption of culture has not been a positive for everyone. Digital technologies played a major role in serving this increased demand for cultural content, but many in the sector lacked the resources, capabilities, infrastructure or business practices to harness this

opportunity. Accessing cultural content from home through digital means also raised challenges for audiences, from lack of appropriate equipment, unreliable, unaffordable or non-existent internet connections, as well as other barriers, such as digital literacy and linguistic barriers – in 2022, 63 per cent of content on the internet was in English.³⁹

Further research is needed on how the digital divide, compounded by the pandemic, has impacted specific groups of cultural practitioners, such as those in rural and remote areas, indigenous peoples, ethnic minorities, vulnerable

I had never thought I'd be a director standing in front of my staff saying, 'The museum is closed from this afternoon until further notice.' There is no doubt that the impact of all this has been dangerously negative on the sustainability of the organization as a business enterprise.

Mathew Trinca, Director of the National Museum of Australia

groups, people with disabilities, young and emerging artists and older people. In addition, research is needed on how the digital divide also provides unequal access to culture for consumers – such as those with limited digital connectivity or digital literacy, or where digital is not a 'space' where they want to participate in culture.

5. Impact on the diversity of cultural expressions

The effects of the pandemic on distribution channels and the drop in investment across the culture sector have increased the precariousness of cultural workers and reinforced deep-rooted patterns of gender and regional inequality. This has deeply affected the production and distribution of cultural goods and services, as well as access to them.

Cultural mobility will be impacted for years to come, with increasingly expensive and restricted travel. Security measures, complex visa procedures and high application fees, inadequate work permit regulation, and lack of funding and support, have all led to a rise in the use of digital tools as a replacement for physical mobility options. Digital access, however, remains highly asymmetrical, with 37 per cent of the global population still offline, primarily concentrated in developing countries.⁴⁰ Artists and cultural professionals who lack digital skills and tools are left at a clear disadvantage and the challenge of fair remuneration in the digital environment is accentuated. Government support is urgently required to promote diverse production, including through flexible implementation of rules on content distribution and through the enforcement of existing regulations in the more open, digital environment.

The increased pressure on the cultural workforce resulting from the pandemic has raised concerns about a serious loss of expertise should people exit the sector permanently or should young practitioners fall into unemployment, or be forced to seek careers in other sectors. In the Netherlands, for example, unions in the culture sector revealed that, during the first lockdown, 30 per cent of their members were thinking about looking for a new career.⁴¹

COVID-19 has slowed recent progress in increasing diversity and inclusion in the sector, radically affecting the conditions for a diversity of cultural expressions to thrive. This has had a disproportionate impact on grassroots organizations and independent creators.⁴² Grassroot organizations' often-precarious financial models have been further tested by the pandemic, and many have had to close their doors for good. For example, nine out of ten grassroots venues in London have reportedly faced closure during the pandemic because of social distancing measures.⁴³ Many have been hampered by gaps in digital and technical skills, as well as by the availability of equipment and technical infrastructure. Such gaps can be an insurmountable barrier for many cultural producers, and hence consumers, especially in developing countries.⁴⁴ Grassroot organizations and emerging creators are a crucial source of independent experimentation and diversity, and

the creativity brain-drain caused by the pandemic may have significant long-term consequences on the social fabric.

The pandemic has also had a profound impact on many forms of intangible cultural heritage, which depend on human-to-human interaction for their very expression and viability, leading to the cancelation and postponement of numerous festivals and traditional ceremonies. For example, the Al Janadriya Festival in Saudi Arabia could not be celebrated in 2020. It is the region's largest festival profiling a diversity of intangible cultural heritage practices, with heritage bands, traditional games, maritime heritage, traditional handicrafts, Nabati (traditional) poetry and falconry, and it usually attracts more than two million annual visitors.

At its core, the diversity of cultural expressions relies on the fundamental human right of freedom of expression. In some instances, the pandemic has regrettably served as a justification for the repression of artistic voices in the name of curbing misinformation.^{45,46} Freemuse regards 2020 as a year when artistic expression was under attack, as evidenced by a record number of cases that resulted in legal prosecution of artists who engaged in peaceful expression: "At least 322 artists were arbitrarily detained, prosecuted, or sentenced to prison terms, primarily on political grounds."⁴⁷

How do we really ensure diversity of cultural expression does not simply mean giving people speaking time? It's giving people equal opportunities to develop this expression, which is something completely different. The diversity issue is becoming more urgent as a consequence of the crisis, even if the crisis is striking all the aspects.

Pier Luigi Saccio, Professor of Cultural Economics at IULM University Milan and former Special Adviser of the European Commissioner for Education and Culture





CHAPTER

KEY TRENDS RESHAPING THE CULTURE SECTOR
IN RESPONSE TO THE COVID-19 PANDEMIC

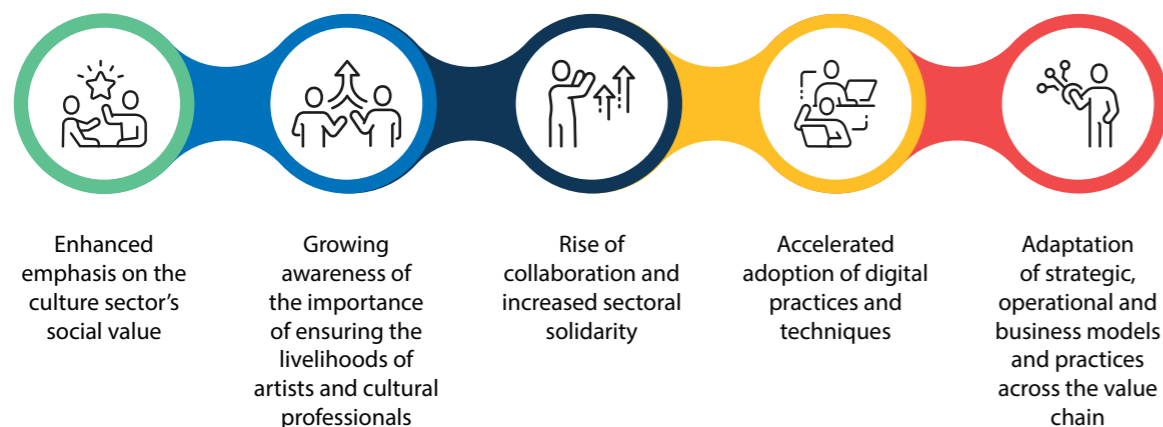
KEY TRENDS RESHAPING THE CULTURE SECTOR IN RESPONSE TO THE COVID-19 PANDEMIC



In addition to the direct impacts outlined in the previous chapter, the COVID-19 pandemic has both aggravated existing challenges for the culture sector and introduced new issues that will have medium to long-term consequences. Such is the level of disruption caused by the pandemic that the sector has been forced to develop new ways of working or to adopt emergent tools at an accelerated pace. The speed and intensity of change experienced by the sector over the past two years has created a strategic momentum and opened the door to a reframing of the value proposition of culture, as a vital stepping stone to a more equitable and sustainable economy.

The following chapter identifies the key trends that are reshaping the culture sector in response to the pandemic and outlines their potential to drive structural and systemic change in the future. These trends were identified on the basis of a wide-ranging literature review of over 100 diverse reports, the UNESCO tracker of government COVID-19 responses, interviews conducted with more than 40 global experts, and quantitative analyses based on data from Oxford Economics and IHS Markit.

Figure 6: Five trends in the culture sector's response to the COVID-19 pandemic



1. Enhanced emphasis on the culture sector's social value

During the pandemic, physical isolation, compounded with uncertainty and anxiety, have impacted people's well-being and mental health.⁴⁸ Over the past two years, the culture sector has purposefully upscaled its vital role in supporting people and communities.

This [the COVID-19 pandemic] has become an opportunity for arts and culture to define its social impact. At a time when there has been greater stress, mental health has deteriorated. Artists and cultural institutions have been stepping up and expressing and positioning ourselves as channels to improve the mental health of society.

Yvonne Tham, CEO of the Esplanade in Singapore

The connection between the consumption of cultural content or participation in cultural activities and higher happiness levels is highlighted in Annie Tubadji's study on culture's potential impact on mental health during the pandemic. The culture sector's upscaled engagement with this issue during the COVID-19 pandemic further demonstrates the potential of the sector to support mental health and reinforce social ties.⁴⁹ In particular, cultural organizations that had strong social mandates before the pandemic found the importance of their work amplified.

Many artists, cultural professionals and organizations of all kinds leveraged the current context to strengthen their social purpose and shape positive outcomes in their local communities.⁵⁰ The variety of responses from cultural organizations span a range of interventions, such as services to combat loneliness and isolation and to improve well-being, to creative educational resources for children and families. Others are mobilizing staff and practitioners

We work with communities of refugees, women subject to domestic violence, youth incarceration leading to delinquency, and refugee camps in Lebanon and in Europe. Our programmes were in greater demand after the pandemic struck.

Omar Abi Azar, Director of the Zoukak Theatre Company in Lebanon

around the COVID-19 response by using their infrastructure and assets to support food banks, community kitchens and health care services, or by deploying their social networks and trusted relationships to deliver community activities. This engagement with the well-being of communities does not only benefit the communities, but also the cultural organizations themselves. A study of 200 cultural institutions in the United Kingdom showed that cultural organizations which adapted most successfully to the pressures of the pandemic tended to view their creative work as part of the wider social, cultural and civic infrastructure within their communities.⁵¹

The mobilization of the culture sector in response to the pandemic has highlighted the ability of artists, cultural professionals and cultural organizations to provide human-centred responses in times of crisis and demonstrated their ability to play a powerful catalytic role as advocates and providers of social value.^{52,53} In future, this trend is likely to be further strengthened by the growing influence of a new generation of individuals, artists and cultural professionals, thanks to their widely documented commitment to well-being sustainability. Younger adults are often guided by personal values and their interest in effecting change in the world.⁵⁴ In order to catalyse their full potential, significant attention is needed to diversify and boost opportunities across the cultural ecosystem so that the entire talent base has equal access to cultural work; and so that all communities feel engaged and represented by the culture sector.

To achieve this re-balancing, governments and other investors in culture can strive to recognize more fully the social impact and value of culture as a foundation for well-being and inclusive growth. At the same time, cultural organizations can also enhance their commitment to support communities' needs and promote cultural rights for all.

2. Growing awareness of the importance of ensuring the livelihoods of artists and cultural professionals

Globally, a larger than average share of jobs in the culture sector are informal, self-employed, contract-based, or part-time in nature. For instance, more than half of the cultural workforce in the Latin America and the Caribbean region was self-employed or freelance in 2020, compared with an average of 38 per cent for the whole economy.⁵⁵ Without the same level of professional or formalized status afforded to workers in other sectors, many cultural professionals, and in particular women, youth, minorities and people with disabilities, have limited access to economic support mechanisms or social safety nets. These conditions make them particularly vulnerable to the impacts of crises, such as the COVID-19 pandemic. Many lack access to resources to sustain their work and careers, such as places to continue their creative work, acquire new skills or leverage opportunities.

Recognizing these challenges, governments and NGOs have announced measures to support cultural practitioners by protecting their income, safeguarding their jobs, or providing guaranteed social security. According to the UNESCO COVID-19 Policy Tracker, 32 of 139 COVID-19 culture sector relief policies at the national level focused on artists and freelancers.⁵⁶ By July 2020, more than 20 countries had implemented policies to help self-employed workers and small enterprises. Ministries of Culture in Canada, Chile, Colombia, Norway, Singapore and the United Kingdom were some of the first to announce support packages specifically designed to help the culture sector. In other countries, including France, Ireland, Luxembourg, Mexico, Poland and Switzerland, independent artists have received social security payments to offset revenue losses. In Spain, artists have had preferential access to low-interest loans.⁵⁷

In another innovative move, unemployment support was made available to freelancers in Finland for the first time ever.⁵⁸

One critical intervention of our government task force was to launch an educational programme, funded by the Korean Film Council, for all professionals in the film industry. When any film professional completes 75 per cent of this programme, he or she receives a financial voucher—both to help them pay the rent, and as an incentive to keep them in the industry.

Yoonhyung Jeo, Internal Audit at the Korean Film Council in the Republic of Korea

In the United Arab Emirates, one of the first relief initiatives for both freelancers and companies globally was launched in April 2020 by a partnership between Art Jameel and Dubai Culture. Applications came from independent freelancers (30 per cent) and companies (23 per cent). These interventions were particularly crucial for freelancers and small companies who are frequently ineligible for traditional assistance from banks and thus require targeted relief.⁵⁹

Several cultural organizations have created support programmes or mentoring sessions for artists and freelancers or developed micro-commissions to engage practitioners in specific COVID-19 responses.⁶⁰ According to Professor Milena Dragicevic, UNESCO Chair in Studies of Interculturalism, Art and Cultural Management and Mediation in the Balkans at the University of Arts in Belgrade, various arts associations in Eastern Europe have been among the first to advocate for artists facing difficult circumstances, even fundraising for artists in need. Many succeeded in these efforts long before public policies started reacting and allocating limited money, which mostly went to the more visible self-employed artist-



entrepreneurs in the sector. Šabac Theatre, the city theatre in Šabac, Serbia, developed a storytelling project for children, hiring actors who had freelance status in the theatre. The theatre focused on those actors who did not have any other source of income and avoided asking for direct donations from the public in order to maintain the actors' sense of dignity and professionalism.⁶¹

This variety of support measures provided crucial support to artists and cultural professionals. However, almost all of them were time limited; while most provided a welcome lifeline, few focused on delivering lasting structural change. Nevertheless, the pandemic raised our collective awareness of the need to find new frameworks to ensure the social and economic status of all cultural professionals, and to build states' capacities to protect artists and cultural professionals' social and economic rights. In this regard, the UNESCO 1980 Recommendation concerning the Status of the Artist offers a roadmap to help governments improve artists' working conditions and enhance their professional, social and economic status through measures related to training,

social security (for example, maternity protection, equality of treatment, employment injury benefits, invalidity, old-age and survivors' benefits and medical care), employment, income and tax conditions, mobility and freedom of expression.⁶² Although progress has been observed in recent years with regard to increased adoption of new legislation in this area, the 1980 Recommendation remains largely under-implemented.⁶³

3. Rise of collaboration and increased sectoral solidarity

The culture sector operates as an ecosystem of interdependent activities and services. It thrives through collaboration and exchange, such as co-production agreements, residencies, conferences and international fairs. However, the traditional modes of collaboration that underpin the sector have been threatened by the COVID-19 pandemic, with limitations on mobility, a collapse in cultural work and significant disparities in capacity for collaboration dependent on socio-economic circumstances. Opportunities for collaboration are also much reduced for artists in the early stages of their careers, who

most often lack the scale and density of networks that can be sustained through a crisis and for whom access to formal and professional channels is limited.

Nonetheless, the severe disruptions brought about by the COVID-19 pandemic have served to spark new types of collaboration across the culture sector. Competitors have often turned collaborators as self-help networks have sprung up throughout the sector.⁶⁴ This trend is highlighted by a survey focused on European Union national institutes for culture, which showed that 22 per cent of their members started working with new partners. While most are collaborating with other arts organizations (72 per cent of the total survey group), some also reported innovative partnerships with tech organizations, international media distribution sites, local authorities, TV channels and local film streaming platforms (9 per cent).⁶⁵

Across the world, public libraries stepped forward to support governments and health care systems through programmes aimed at combatting vaccine misinformation. A library journal in Iraq underlined the essential role that libraries play to ensure access to accurate science-based information to the public.⁶⁶

In some countries, public institutions offered spaces, technical equipment and digital skills to civil society organizations, or developed collaborative projects in the digital sphere. Substantial mutual support between civil society organizations, commercial organizations and individual practitioners have also been observed. Some civil society organizations, which were unable to hold large gatherings, (for example, the Center for Cultural Decontamination in Belgrade) opened their spaces to other organizations or individuals for small exhibitions and performances with very limited audience numbers.⁶⁷

At the international level, UNESCO's ResiliArt movement, which was launched on 15 April 2020, has been highly successful in sounding the alarm about the impact of the pandemic on the culture sector. The movement was joined by thousands of artists and cultural professionals around the

By the end of April 2020—just a month after the pandemic started for us—we were already collaborating with 40 galleries around Brazil. We started a group online to come up with ideas on how we could keep engaging collectors, and solutions so that our artists would not starve. For example, we agreed to pool our contact lists so that we could reach all the collectors as a group of galleries, instead of just one-on-one. [However], when things move on again, we are going to be competing for the same places, we are going to be competing again for the same collector that is at the art fair, and then maybe you will no longer be willing to collaborate as much.

Larissa Martina, co-founder of the RV Cultura e Arte Gallery in Salvador, Brazil

world, who used the platform to discuss, debate and share ideas. Over 350 debates involving more than 110 countries have resulted in 100 concrete recommendations to policy-makers, not only to support the recovery of the sector, but to bolster its sustainability and resilience to future crises.

During this critical period, some of the most successful and innovative collaborations have been cross-sectoral, where partnerships have focused on specific needs during the pandemic or on at-risk groups, extending into areas such as technology, sustainability and science. Extra-sectoral cooperation has led to new forms of cultural expressions, including through the use of digital technologies.⁶⁸ The United Kingdom's Brighton Festival has been developing the idea of a 5G festival in collaboration with a leading innovation agency, Digital Catapult. The platform delivers a music collaboration toolset and a unique connection between

artists, audiences and venues.⁶⁹ Cross-sector partnerships are a powerful way for local cultural ecosystems to build resilience, social purpose and innovation. There is now an opportunity to embed these cross-sectoral partnerships at a local, city and regional level.

To maintain and upscale the benefits of new types of collaboration after the pandemic, players and stakeholders in the cultural ecosystem should take the opportunity to work with governments and NGOs to co-create new types of exchange and collaborative practice. For instance, governments may consider revising the type of support they provide to cultural organizations, including by providing incentives to collaboration and networking. The support provided to cultural mobility or research and development will also influence the culture sector's productivity and innovation capacity in the future. Smart brokerage and investment are necessary to ensure that cultural organizations and artists are not once again competing for an ever-diminishing pool of resources. Interviewees across the culture sector, such as people involved in theatres, museums, galleries and the film industry in North America, Europe, Latin America and the Caribbean, Africa, and Asia and Pacific all mentioned competition to attract talent and resources as a barrier to collaboration as recovery from the pandemic continues.

4. Accelerated adoption of digital practices and techniques

While the digital transformation was well under way in the culture sector before the pandemic, COVID-19 has exponentially accelerated its development, especially in those domains that had been dependent on in-person audiences and visitors.⁷⁰ For some parts of the sector, this acceleration helped to offset some of the worst economic impacts of the pandemic. According to the International Confederation of Societies of Authors and Composers (CISAC), a 10 per cent decline in worldwide royalty collections for creators in 2020 (about US\$1 billion less than 2019) was mitigated by a significant switch to digital in some markets. Revenue from digital collections increased by 16.6 per cent, mainly through the rise of SVOD.⁷¹

Worldwide royalty collections for authors and composers

↓ 10%

The adoption of new digital practices to overcome the impacts of COVID-19 can be seen across the entire spectrum of cultural and creative industries. In Albania, 87.5 per cent of cultural institutions and many culture sector enterprises have made use of the internet to engage audiences, providing access to recorded theatre shows and performances, digitized libraries and archives, as well as live-streamed performances.⁷² In Saudi Arabia, The King Fahd National Library completed summaries of 115,000 books, and the King Abdulaziz Foundation for Research and Archives digitized 556 film reels from its archive of photos and films in 2020.⁷³

In China, more than 1,300 museums offered online viewing over two weeks during the peak of the pandemic outbreak in early 2020.⁷⁴ As of June 2020, the National Opera House in Santiago had held 27 virtual live events, attended by over 260,000 people.⁷⁵ Many artists and craft and product designers now offer their work directly to consumers through online platforms rather than through galleries or shops, stimulating new partnerships with major online retailers.⁷⁶ But, while these new online models foster innovation and expand reach, they also threaten the continuity of smaller galleries and distributors and raise issues of market concentration in online distribution.

In Lebanon, the Zoukak Theatre embraced digital formats to stay relevant. Initially the approach focused on resurrecting old media, like radio plays, and linking small regional and community radio stations to the outside world. However, by the end of 2020 they had a solid presence on SoundCloud with a few thousand listeners.

The varied impact of digital transformation on cultural and creative industries has come to the fore. Performing arts, and theatre in particular, are particularly challenged in the digital era. While there is an untapped potential for the performing arts to embrace digital approaches,⁷⁷ it is also arguably one of

the areas where digital aspects pose the greatest challenges. Many researchers believe the pandemic is a tipping point for the culture sector and that digital means of engagement and dissemination will remain relevant even as restrictions on in-person gathering and mobility are lifted.⁷⁸

Theatre is all about being together. It is life, it is not cinema; it is a real experience, so all our paradigms were lost. It is as if you are a plumber in the city but there is no more water in the world. But we understood very quickly that COVID-19 was presenting a new world order—suddenly all of us were hyper-connected. Our online presence is more important for the moment internationally and locally than our physical presence.

Omar Abi Azar, Director of the Zoukak Theatre Company in Lebanon

The digital transformation has resulted in new forms of creation, production, distribution and access to culture, as well as the emergence of new strategic and operational business practices. However, has also created significant challenges surrounding the diversity of cultural expressions and contributed to a worsening of existing inequalities. More than four billion people around the world do not have regular access to the internet.⁷⁹ In Yemen, in December 2020, the percentage of internet users was estimated at just 26 per cent.⁸⁰ Furthermore, digital access is distributed unequally across population groups, leaving people in rural areas, women and older people disproportionately disadvantaged.⁸¹ Only 27 per cent of women in Africa have access to the internet and only 15 per cent of them can afford to use it.⁸² In Sub-Saharan Africa, the internet-user gender gap was 20.7 per cent in 2013 and up to 37 per cent in 2019. Digital illiteracy is also a persistent barrier. Individuals with good digital access and skills are favoured by this trend,

while less digitally savvy cultural professionals lack the digital tools and know-how to create or participate in online communities. This is also true for audiences, who vary in their ability to access cultural products, creating a greater divide between those who do not have the access, skills, motivation or confidence to access the internet and those who do.

Digitization offers a wealth of possibilities for the sector, but it also presents challenges to the diversity of cultural content. Within the digital economy, major distributors of cultural content are directly funding productions, giving them influence over cultural output. These major distributors use algorithms to recommend content to users, which allows them also to influence the discoverability of diverse cultural expressions and runs the risk of trapping people in cultural bubbles. Weak or inadequate national regulatory frameworks mean that these multinational companies are often not subject to national regulations put in place to promote and protect the diversity of cultural expressions, such as local language quotas.⁸³

In the music sector, nearly all major streaming services use some version of the 'big pool' model for payments to artists (major-label superstars derive the bulk of their revenue from streaming platforms), and this payment model may have a profound effect on niche artists and local repertoire.⁸⁴ The use of new technologies in the culture sector, such as artificial intelligence and machine learning, also raise important questions regarding intellectual property and fair remuneration.

This digital transformation, the pace and depth of which was amplified and accelerated by the pandemic, requires a more strategic approach that includes the development of appropriate governance models, involving a broad range of stakeholders such as ministries of culture, communication (or those with a portfolio on media and broadcasting), trade and industry (or those responsible for copyright regulation), private actors, civil society and other relevant agents, as well as regional players.⁸⁵ In this regard, UNESCO's Operational Guidelines to protect and promote the diversity of cultural expressions in the digital environment, as well as their

associated roadmap, provide guidance, including clear expected results and concrete reference activities to protect the means of creation, production, dissemination, access and exchange of cultural goods and services in the face of rapid technological change.⁸⁶

Obviously, COVID-19 was uneven, and some companies really thrived. Especially digital models really thrived, whereas others absolutely suffered. Particularly those highly dependent on live performance, such as live events and entertainment died, and the performing arts.

Mark Wee, Executive Director of Design Singapore

5. Adaptation of strategic, operational, and business practices across the value chain

The pandemic resulted in significant and immediate changes to existing revenue streams, threatening the short-term economic viability of large numbers of organizations and cultural professionals across the culture sector value chain. This challenge led to widespread concern over the future viability of many organizations, as well as the ability of individual artists and professionals to continue working in the culture sector.⁸⁷

A number of emerging business models and practices can be observed across institutions – large and small, private and public – and among individual practitioners. Cultural organizations have adapted at different paces, depending on their size and agility, as well as their strategic context and mission. Several organizations with high overheads and large wage bills were forced to furlough staff or cease activities as an immediate response to pandemic shocks. Many are only now beginning a deeper review of their strategies and models with longer-term survival in mind.⁸⁸

For many smaller, independent organizations, with precarious income streams before the pandemic, the situation was dire. While some were small enough to be more agile and innovate, many were forced to close, unable to sustain themselves.⁸⁹ A high per centage of these organizations, including almost 13 per cent of museums worldwide, are tragically not expected to reopen, significantly altering the composition and balance of organizations in cultural ecosystems, reducing the availability of and access to cultural resources, and threatening the preservation and continuity of cultural diversity. For organizations that rely on earned income and high-capacity events, such as regional theatres, festivals and sectoral fairs, recommencing activities safely but at limited capacity may not prove profitable. Such organizations are being forced into an adapt-or-die rethink of their traditional delivery models.⁹⁰

In many cases, digital modes of engagement provide alternative revenue streams, but these, however, require making significant changes to strategies and operating models that are not always feasible for all cultural professionals and organizations. Improving the digital experience can be a great approach to growing audience numbers. For instance, Suzhou Museum in China launched two live-streaming events in March 2020, attracting 580,000 viewers (equivalent to the number of offline visitors over a typical three-month period) and four times the number of average on-site daily sales of their cultural productions.⁹¹ The digital environment is also providing networking opportunities for the sector's stakeholders. Beat Zhwalen, CEO of Art Basel, spoke of the innovations under development by his organization, including a marketplace application to connect stakeholders across the arts value chain and a blockchain application for the industry.

Many organizations that depend heavily on international tourism, such as iconic cultural sites, have pivoted to local visitors and communities sustain their operations. The Sydney Opera House has reshaped its programme around a diverse calendar of live events led by local artists and designed to appeal to more youthful local audiences.⁹² In Brunei, where the number of inbound travellers dropped

These are of course completely new business models, which are only possible because of digital technology. As an organization, you need to be extremely agile and fast and that, for me, has been the main lesson.

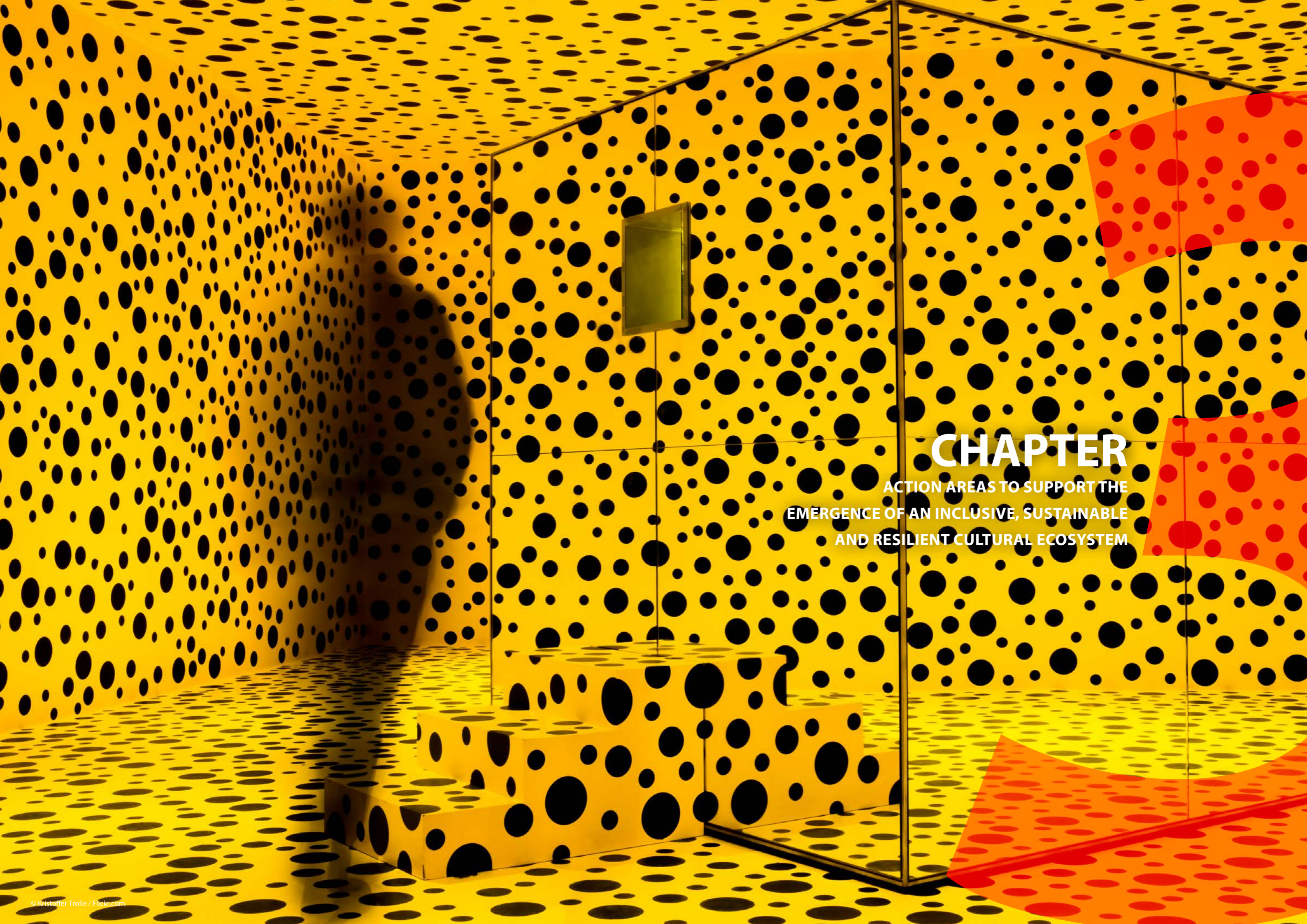
Beat Zwahlen, CEO of Art Basel

by more than 70 per cent in 2020, cultural centres have started to involve people from local communities with the aim of contributing to their well-being and development.⁹³ The city of Macao's online handicraft-teaching programme commissioned local artists to provide video tutorials for the community.⁹⁴ These kinds of innovative approaches bring new ways to produce and distribute cultural content as well as opportunities to broaden market potential and audience reach – sometimes by staying closer to home. They also point towards opportunities for a greener future thanks to the emergence of sustainable cultural tourism practices.

Individual artists have also found new ways to connect directly with their audiences, often cutting out the middle link, and multiplying their revenue streams to increase or maintain their income. Several online platforms allow creators to share content with people for a subscription fee, such as Patreon, or allow people to make donations directly to creators, such as Buymeacoffee. Other platforms focus on curating unique and exclusive experiences between artists and their audiences, such as China's ModerSky's Cloud Disco and Strawberry Room. Other emerging technologies, such as non-fungible-tokens (NFTs), which are a non-interchangeable unit of data stored on a blockchain, have allowed creators to sell digital art and create new revenue streams.

The challenges of achieving such transformations across the cultural value chain are profound. Embracing new working approaches and business models may create uncertainty and instability in the short to medium term. This is especially the

case for individual artists and cultural professionals who lack access to organizational infrastructure and the support that can offer. However, for many artists, cultural professionals and cultural (or culture and creative sector) organizations struggling for survival in the wake of the pandemic, new operational assumptions and innovative practices may offer the best path to recovery.⁹⁵ Investing in new skills, infrastructure and collaboration models will be paramount if diverse and sustainable cultural practices are to emerge from the pandemic.



CHAPTER

ACTION AREAS TO SUPPORT THE
EMERGENCE OF AN INCLUSIVE, SUSTAINABLE
AND RESILIENT CULTURAL ECOSYSTEM

ACTION AREAS TO SUPPORT THE EMERGENCE OF AN INCLUSIVE, SUSTAINABLE AND RESILIENT CULTURAL ECOSYSTEM

The value of arts and culture to society needs to be discussed with the government and reasserted as it still sees arts and cultures as an end. Arts are a mean.

Smriti Rajgarhia, Director of Serendipity Arts Foundation

The two previous chapters gave an overview of the main impacts of COVID-19 on the culture sector, shed light on the profound damage done by the pandemic to livelihoods, artistic practice, and access to cultural expressions, and underlined the exacerbation of existing structural inequalities within the sector. Yet, this report also provides reason for hope, putting forward several examples of innovation and resourcefulness across the culture sector in every region of the world. In the face of significant challenges, many segments of the culture sector have found ways to adapt by forging new collaborations, embracing new technologies and thinking outside the box.

However, ensuring the sustainable recovery of the culture sector will require a step change in the way culture is valued and supported. Governments and their civil society and private partners all have a role to play to reframe the value proposition for culture and position the sector as a keystone of sustainable social and economic development. A recent report titled 'For a progressive arts and cultural policy agenda in Australia' calls for a move away from the simple equivalence of culture as a driver for economic development and growth, towards one which goes back to the basics, arguing that:

"[Culture as] essential to the flourishing of human life and society as health, education, and the material infrastructures of everyday life. Let's talk about building communities

around care, craft, and culture. Let's relearn the community and union organising traditions that have been central to cultural work and art in everyday life. A new cultural policy agenda would supercharge important sector work on justice, intersectionality, diversity, and decolonisation. The arts and cultural sector can be central to championing justice and liberation, not simply diversity and representation."⁹⁶

Policy-makers are called upon to work with the culture sector to identify shared opportunities and implement transformative policies, initiatives and measures. This chapter highlights opportunities for a new policy agenda that invests in culture as foundational to post-COVID societal recovery and renewal. It calls for a new deal for culture, which seeks to maximize the sector's contribution to 'flourishing human life and society' by maximizing opportunities for a more inclusive, diverse and collaborative cultural and creative industries.

As we step tentatively into a new reality, responses have evolved from 'rescue' to 'recovery' and have accelerated the urgency to 'reframe' approaches to the culture sector. This three-phased process is, for instance, reflected in the structure for the 2022 Road Map of CENDANA⁹⁷. CENDANA is working on a mission to re-energize, reorganize and champion the role of arts and culture in society and has balanced tailored 'rescue' interventions, such as emergency funding, with long-term structural reforms such as tax incentives for investment in culture, digital capacity-building for artists and new collaboration models which build the overall cultural ecosystem.

The picture globally is very mixed, and few countries have engaged in an exhaustive revision of their cultural policies to secure the future sustainability of their culture sector. Many cultural professionals and organizations are still in need of immediate financial support, while others are beginning to identify pathways for renewal and transformation.

This complex reality suggests that there is a need for tailored policy and investment responses, from targeted urgent measures that ensure the immediate survival of the sector and its actors, to a shift in cultural governance that reframes the role, position and value proposition of culture in the long term.

Building on the analysis of the main consequences of COVID-19 on culture and the emerging trends that are transforming the sector, this chapter proposes an integrated framework based on **five priority areas**, which if addressed holistically, would allow the reimagining and repositioning of culture as a foundation for a more inclusive, diverse and sustainable society and economy, illustrated in Figure 7.

Figure 7: **Improving conditions across five key areas can accelerate COVID-19 recovery and support the development of a thriving and resilient culture sector**



The need for structural change is clear; previous siloed approaches may be reconsidered in favour of an alternative that aims to strengthen the sector's fundamental pillars collaboratively to enable a resilient and robust ecosystem that can flourish and withstand emerging challenges. Taking stock of the gaps and opportunities revealed by the

pandemic, policy-oriented action points are developed under each priority area below to help guide future decision-making. It is understood that each part of the culture value chain will require a tailored and evidence-based approach to both renewing the culture sector and supporting culture as a foundation for sustainable development.

1. GUARANTEEING THE SOCIO-ECONOMIC STATUS OF ARTISTS AND CULTURAL PROFESSIONALS IN THE WAKE OF THE PANDEMIC

Artists and cultural professionals have suffered disproportionately over the past two years. Gaps in social protection coverage – even in countries with social security schemes for freelancers or self-employed people – have left a significant proportion of cultural professionals in need of support, even leading some to leave the sector altogether.^{98,99}

In the short-term, many artists, creators and cultural professionals still need support to ensure their immediate economic survival. Over the medium and longer-term, lessons from the pandemic could inspire a systematic sectoral transformation, including guaranteeing more stable working conditions, enhancing social protection, ensuring fair remuneration, reducing mobility barriers, safeguarding freedom of artistic expression and developing skills and career development opportunities. These efforts would be aided by supportive legislation and policy instruments to promote and protect the status of artists and cultural professionals, as well as through the strengthening of networking opportunities and solidarity. Governments could be inspired by the provisions of UNESCO's 1980 Recommendation to improve the professional, social and economic status of artists through the implementation of policies and measures related to, inter alia, training, social security, employment, income and tax conditions, mobility and freedom of expression.^{100,101}

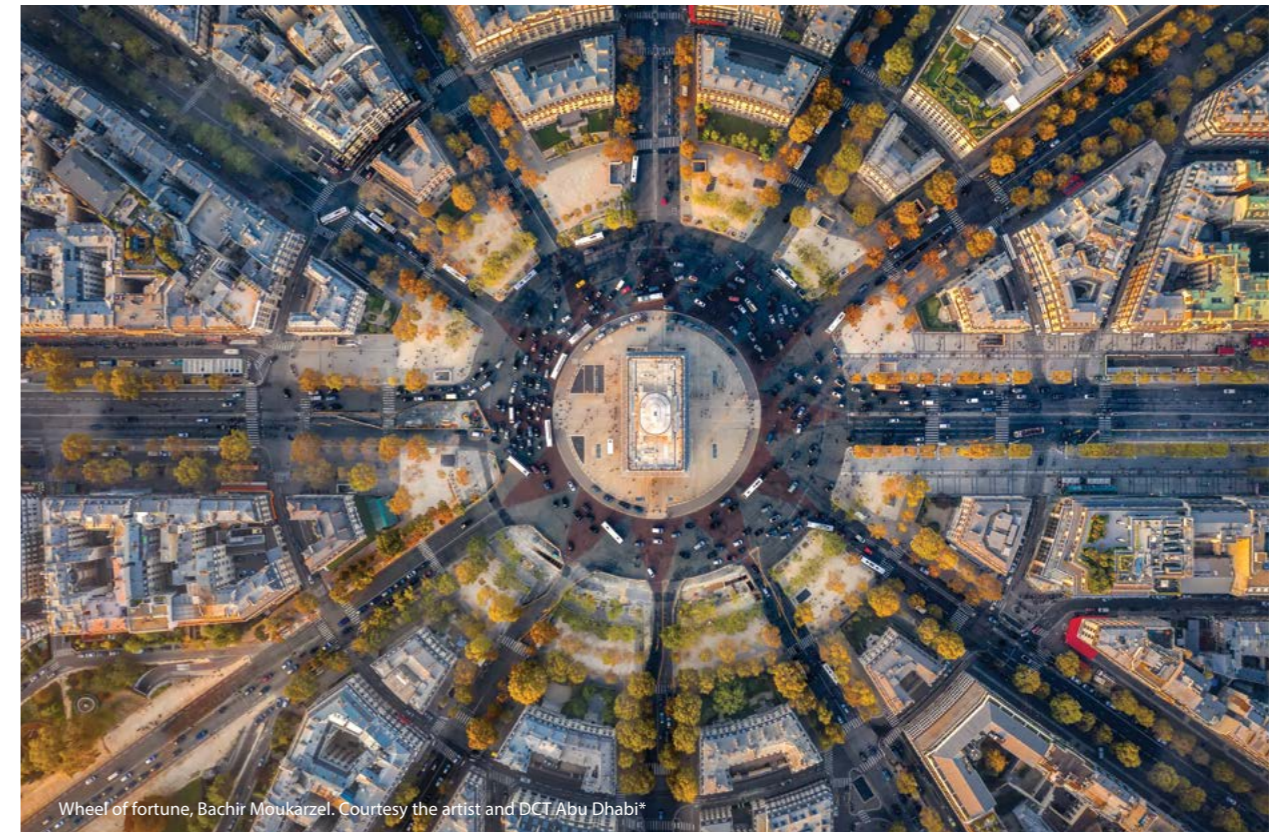
1.1 Ensuring comprehensive, adequate and sustainable social protection for all culture sector workers.

Anchoring the rights of artists and cultural professionals to a strong legal framework and adapting public support systems to the specific modalities and particular conditions of their profession would help to develop and retain talent.¹⁰² In this respect, particular attention should be paid to women and young people, as well as to those in vulnerable situations such as people with disabilities, migrant workers, workers in precarious employment arrangements, people in low-paid jobs and those working in the informal economy. Women artists and cultural professionals would particularly benefit

from the provision of specific support measures such as paid parental leave and childcare support, as well as inclusive training and lifelong learning opportunities, including opportunities to acquire the skills to leverage the opportunities offered by the digital environment.

1.2 Building a net of support mechanisms which reduce barriers to professional development across the culture sector.

Building strong cultural organizations, through reinforced policies and measures led by both the public sector and civil society can contribute to securing a dynamic ecosystem that can help reduce fragmentation and foster stability and continuity. Support models that could be implemented include business interruption insurance (comparable to unemployment benefits),¹⁰³ or even a universal basic income and/or minimum wage that ensures all cultural professionals can support themselves through their work. Improved solidarity and collective bargaining power can be facilitated through the introduction of culture networks, exchange programmes and unions or equivalent for artists and cultural professionals. There is also a growing need to promote the fair distribution of opportunities and revenues in a market increasingly dominated by streaming platforms.¹⁰⁴ Developing sectoral knowledge about adequate intellectual property protection (and introducing adequate regulation if it does not exist) will be key, as will improving the transparency of remuneration models based on intellectual property rights.¹⁰⁵ It is however important to recognize that different countries and regions are at very different stages of development. For example, in the Arab States, adaptations of major regulations in this field are still underdeveloped, while a lack of cohesion between international, local and sectoral regulations persists. Government support is extremely important for establishing rights organizations at the national level.¹⁰⁶



1.3 Reigniting mobility and exchange across the culture sector.

In the short term, rapid access to emergency funds is critical to ensuring the immediate survival of small private culture sector organizations and individuals that have been affected by cancelled or postponed international events, especially in developing countries and for younger people – groups who often lack the professional networks to which initial access depends on face-to-face participation.¹⁰⁷ Innovation in new types of mobility and artistic development is likely to remain important even as restrictions on mobility continue to ease.¹⁰⁸ Digital technologies like virtual reality may offer an opportunity to reimagine accessible artistic spaces in a creative way, such as by offering virtual residencies, allowing artists to receive grants and take part in residencies from their own homes. Such approaches will also facilitate a rethink on models for mobility, for instance towards hybrid approaches which limit unnecessary travel to reduce carbon emissions and prioritize access for cultural professionals who would otherwise be excluded from professional development opportunities.

Governments can consider steps to reduce the bureaucracy and administrative barriers that existed before the pandemic and which disproportionately affected artists from developing countries, including working permits, double taxation, visa regulation and copyright clearance.¹⁰⁹ Granting preferential treatment to artists and other cultural professionals – as well as cultural goods and services – from developing countries, through the appropriate institutional and legal frameworks (including through specific clauses in trade and investment agreements) could help to support balanced international flows and promote cultural diversity. Other helpful interventions might include setting up mobility information systems to empower artists with helpful guidance; implementing operational programmes that support the mobility of artists and cultural professionals, especially from developing countries, through mobility funds and cultural events; and setting up exchange facilities with simplified administration requirements.¹¹⁰

1.4 Protecting freedom of artistic expression and the right to participate in cultural life.

In the past two years, censorship and disinformation, compounded by a lack of funding and restrictions on performance and interaction, led to a shrinking number of spaces for free artistic expression.¹¹¹ As underlined earlier in the report, Freemuse reported that the number of artists killed in 2020 almost doubled compared with 2019, while imprisonment of artists increased by 15 per cent, and the prosecution of artists rose by about four times compared to previous years.¹¹² A greater number of safe cultural spaces allowing open debate, experimentation and freedom of expression are needed to facilitate the renewal of the sector and ensure a full diversity of talent is able to participate in the cultural ecosystem.¹¹³ Networks of cultural and creative hubs played an

important role pre-pandemic, providing a safe nurturing environment for creative talent to develop new work, collaborate and innovate. Such networks exist in countries as diverse as the Philippines¹¹⁴, Nigeria¹¹⁵, Viet Nam¹¹⁶ and across Europe¹¹⁷. They provide peer-led networks which support collective sector development and position culture at the heart of processes such as urban development and place-making. A recent study by the British Council noted how festivals in South-East Asia provide the nurturing environment for emergent creative talent, as well as operating as platforms for critical discourse and as runways for innovative practice. The revitalization of festivals and cultural hubs can play a critical role in facilitating safe spaces for intercultural dialogue and nurturing freedom of expression.¹¹⁸



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2. BUILDING EVIDENCE-BASED SUPPORT FOR THE CULTURE SECTOR'S RECOVERY, GROWTH AND CONTRIBUTION TO LONG-TERM SUSTAINABLE DEVELOPMENT

The COVID-19 pandemic has highlighted major gaps in data on the culture sector, including information on artists and creative practitioners, royalties and copyright, employment figures and accurate GDP contributions, as well as audience consumption patterns, among other relevant aspects. Data collection and information-sharing nourish policy decisions, actions, monitoring and evaluation, and improve impact assessment for more transparent and responsive cultural governance. Empirical evidence can also support the valuing of culture and provide concrete evidence of its contribution to socio-economic development, which could help propel the sector's recovery and support governmental prioritization going forward.¹¹⁹

Collecting this data is not straightforward given the fragmented and often informal nature of the sector. The establishment of shared practices and platforms would assist data collection efforts across a broad set of stakeholders. It would also advance evidence of how culture impacts across a range of outcomes including the SDGs, enabling the sector and partners to move away from pure economic indicators towards a wider value proposition. Networks of cultural professionals and cultural intermediaries can be mobilized at local and regional levels; connecting at national and international levels to share knowledge and tools on data collection methodologies, as well as on the data and evidence collected. With the support of governments and NGOs, such networks can mature into more formal partnerships and programmes bringing together academic research centres, civil society, cultural institutions and bureaus of statistics.

2.1 Standardized data and evidence development to facilitate knowledge exchange and provide an evidence-based approach for a reframed value proposition for culture. A number of tools can be leveraged by local, national and regional players to enable benchmarking, global standardization and comparison: the 2009 UNESCO framework of cultural

statistics;¹²⁰ the revised monitoring framework of the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions in 2020;¹²¹ and the UNESCO Culture|2030 Indicators.¹²² The EU Cultural and Creative Cities Monitor is another practical resource to help countries streamline information collection in cities.

2.2 Tailored data and evidence collection: an upsurge in mapping, evaluation and strategic analysis on the profile, dynamics, role and impact of culture.

The COVID-19 pandemic created significant new complexity for policy-makers and highlighted the importance of ongoing shared learning between stakeholders. Supporting the development of statistical capacities at all levels and establishing a centralized system accessible to all will be instrumental in strengthening transparency and supporting evidence-based decision-making. Multilayer data reporting at the sub-national, national, regional and international levels, as well as increasing data accessibility between the public and private sectors, can also enable better data sharing. However, effective data sharing is not possible without an upsurge in data collection at every level and in every region. Reporting mechanisms under international conventions and voluntary national reviews may provide guidance and principles for developing internationally agreed data indicators and approaches to data reporting and exchange, including across sectors such as culture, education and health, which can help provide evidence of the contribution of culture to sustainable development. The need to build a detailed picture of culture at the local level is equally urgent. In many contexts, tailored data and evidence tools have been developed to assess the impact of COVID-19 on the culture sector. These have taken place in very contrasting contexts, such as Malaysia, Norway, Portugal and the United Arab Emirates. They provide a

snapshot or ‘health check’ of the sector and introduce new baseline analysis which can become a useful resource for future surveying and sector engagement. In addition to valuable primary data, such surveys have provided a vital means of engaging with and demonstrating support for culture at a time of crisis. To cease this engagement in a time of recovery would be ill advised. Participatory processes are fundamental to systematize coherent data collection in the field of culture, including by strengthening regional, global and thematic collaborations between governments, civil society, research bodies, intergovernmental organizations and United Nations’ agencies.

2.3 Data sharing benchmarking and knowledge exchange. Improved data sharing mechanisms between countries and regions would promote benchmarking, facilitate peer learning and help with the monitoring of progress towards shared goals. Sharing information through open databases or web portals, such as UNESCO’s Policy Monitoring Platform for the 2005 Convention, supports transparency and

reinforces synergies between national and international monitoring, while enabling stakeholders to better chart progress, identify effective policies and strategies, and improve existing policy instruments.¹²³ United Cities and Local Governments (UCLG)¹²⁴ also provides a global network and platform for shared knowledge from macro-level culture impacts to methodology exchange, building networks of municipalities to prioritize data collection and exchange. Networks and exchange platforms of culture organizations, municipalities and even regions will play a vital role in both coordinating methodologies for data and evidence collection, and sharing knowledge to aid sector solidarity and consolidate consistent approaches to measuring the baseline for and impact of culture. Networks such as the Indonesian Creative Cities Network, the Arterial Network in Africa, and Eurocities across Europe, each provide platforms for knowledge transfer, shared learning and building peer learning. They are also vital as communities of practice, supporting culture in wider areas of sustainable development.



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3. HARNESSING TECHNOLOGICAL CHANGE TO SUPPORT INNOVATION AND FACILITATE A DIVERSITY OF CULTURAL EXPRESSIONS

Digital accessibility deficits, including poor internet access, high data costs and a lack of digital skills and infrastructure remain fundamental obstacles for many cultural organizations, professionals and audiences. As the sector recovers from the impacts of the COVID-19 pandemic, addressing these gaps will be critical to maintaining and promoting a diverse, vibrant and inclusive culture sector. Doing so requires a highly participatory and intersectoral approach involving ministries of culture, communication (or those with a portfolio on media and broadcasting), trade and industry (or those responsible for copyright regulation), as well as private sector actors and civil society – both at the national and regional levels.

As widely reported, the COVID-19 pandemic dramatically accelerated digital transformation across the culture sector. Organizations and cultural professionals across the value chain have, where feasible and affordable, increased their use of digital practices and platforms to reach audiences, retain business and remain relevant, however inequalities have also deepened as a result. Disparities in digital access run along gender, race, minority status and other society-wide fault lines. In areas that use technology intensively, such as audiovisual and interactive media, these imbalances perpetuate existing societal inequalities.

To accelerate recovery and ensure that the culture sector as a whole benefits from the digital transformation, interventions will be required to help bridge the digital divide, not just in terms of internet access and infrastructure, but also in terms of digital literacy and skills development. Effective interventions aim to preserve, and encourage, the development of a diverse digital space, where rich and varied content is truly discoverable and accessible online. In addition, robust regulatory frameworks are needed to ensure fair remuneration and revenue distribution for creators, authors, performers and labels who use digital platforms to share creative content. The Operational Guidelines for the Protection and Promotion of the Diversity of Cultural Expressions in the Digital Environment, which were adopted by Parties to the 2005 Convention in 2019,¹²⁵ as well as UNESCO’s 2021 Recommendation on the

Ethics of Artificial Intelligence provide useful guidance in this fast-changing landscape.¹²⁶

3.1 Building the digital capacity of artists and cultural professionals. To continue their digital journey – or indeed begin it – cultural organizations and professionals will need support to develop viable, sustainable new models, to create high quality digital content, to access enabling equipment and infrastructure, as well as to access data on the changing needs and preferences of audiences and consumers, and successfully harness digital distribution platforms. Investments in digital skills and literacy will be pivotal to that journey – not only to help deliver new online modes of cultural expression, but also to engage in key digitally driven areas.

3.2 Enhancing policy and regulation. Policy and regulation interventions can aim to create a more level playing field in a number of ways, including by helping local producers retain commercial rights, encouraging broadcasting business models that elevate local content, providing funding for diverse screen-based material and compelling media platforms to meet requirements on domestic content. They can also apply tax laws equitably to domestic and foreign online providers, and ensure transparency in the use of algorithms.¹²⁷

3.3 Strengthen copyright and intellectual property legislation. Respecting copyright in the digital environment means compensating the artists fairly for the use of intellectual properties and safeguarding cultural expressions, which can in turn strengthen the future resilience of the culture sector. For example, legislation can be established to guard against copyright infringements – an effort that will require collaboration between governments and civil society organizations and support from commercial digital platforms and other private sector players, as well as specialized agencies or designated bodies which may respond to complaints about intellectual property infringement directly on the ground.¹²⁸

4. RESHAPING CULTURAL POLICIES AND PROMOTING SECTORAL COLLABORATION AND PARTICIPATION, BUILDING ON INCREASED SECTOR SOLIDARITY AND EXCHANGE

COVID-19 has exposed fragility and gaps across every area of cultural governance, partnership and networking. It has undermined the capacity of cultural professionals to work together and to find a collective voice and shared purpose. However, after the immediate shock of the pandemic, a more collaborative culture sector has emerged. Some organizations and practitioners have started to reimagine their roles in the cultural ecosystem – not as a collection of individual entities, but as a wider, connected system. This is demonstrated by joint statements, advocacy actions and new partnerships.¹²⁹ However, access to networks is unequal, capacity to collaborate varies enormously, and the visibility and voice of the culture sector is under severe threat in many parts of the world.

Going forward, the culture sector's stakeholders can further strengthen the sector's resilience by pooling knowledge, resources and funding, and by engaging with the full diversity of artists and professionals across the cultural ecosystem.¹³⁰ This generates opportunities to improve governance mechanisms and working models on a broader scale, making for a more sustainable, inclusive and resilient cultural ecosystem overall. Indeed, there is a growing need to build an ecosystem-wide approach for culture, connecting elements and cultural domains which for too long have been structured independently. For example, heritage assets, such as living heritage, are also assets for contemporary cultural practices. Such practices flourish in intercultural and cross-artform environments that can help break policy boundaries between cultural and creative industries-oriented and heritage-oriented policies and foster their synergies.

Participatory policy development, implementation and monitoring can play a pivotal role in accelerating the sector's revival. A thriving and diverse cultural ecosystem delivers benefits across many sectors of the economy and contributes substantially to social well-being. Integrated approaches across government ministries – and at different

levels of government – will enable better policy design, implementation and monitoring going forward. While promoting greater participation, collaboration, transparency and accountability in culture sector governance is not a new concern, it has become vital. A number of actions can facilitate effective collaboration between the public and private sectors and civil society in a more meaningful way than simply collecting feedback on policy development. These include providing open spaces for discussion, training in public policy-making, strategic and operational sectoral planning, broad consultations, feedback sessions at various stages in the policy process and joint-effort participatory implementation.

4.1 There is much good practice which can be built upon in every global region. In May 2020, more than 100 civil society representatives from the culture sector in Honduras participated in a national call organized by the Committee of Cultural Centers of Honduras, within the framework of the ResiliArt movement launched by UNESCO. The mechanism brought together cultural centres in the country's central district for communication and exchange on the impact of COVID-19 on cultural institutions and activities.¹³¹ In Abu Dhabi, a study of the performing arts and music sectors adopted an ecosystem lens to provide recommendations that support the growth of the sector. The proposed outlook focuses on developing networks, supporting knowledge flows and interactions, and enabling shared governance systems linking public and private sectors, civil society, post-secondary and other stakeholders in collective planning and decision-making.¹³² The Ministry of Culture in Mongolia has, during the pandemic, developed a Creative Economy White Paper and Road Map using an evidence-based participatory approach. Building on the nation's unique cultural heritage, its collective memory and its natural environment, the roadmap proposes an innovative and

ambitious vision: to establish Mongolia as the world's most sustainable creative economy by 2050. This policy process, which has been inspired by the 2021 United Nations' Year of Creative Economy for Sustainable Development, was underpinned by the country's first extensive baseline mapping study on the cultural and creative industries, which used international benchmarks and models tailored to the Mongolian context. It also involved an extensive process of sector engagement, co-creating the strategic priorities, with a focus on post-Covid renewal and transformation.¹³³

4.2 Globally, existing networks can be strengthened and made more inclusive to engage with the full diversity of cultural resources and actors. This can include leveraging the multiple trust-based connections, knowledge exchange activities and shared development journeys facilitated by networks and programmes such as the UNESCO Creative Cities network, Capital of Culture Networks which exist in most global regions, World Heritage Sites, and countless local and regional initiatives. In addition to existing networks and platforms, this time of urgency and renewal presents an opportunity to tap into the innovative power of sectoral collaboration by developing new partnerships and strategic coalitions, including shared approaches with civil society organizations which are active and impactful on the nexus of, for example, culture and gender equality or culture and the climate emergency. An extensive research programme on cities in China, Indonesia, Malaysia and Viet Nam has highlighted the ways in which cities of all sizes are vital to providing spaces, platforms and networks where cultural professionals can come together to collaborate and engage with vital challenges, including the rights of minorities and sustainable urban renewal.¹³⁴ This research has shown that medium-sized cities are leading a new era of sustainable city-making by leveraging culture, thanks to the creation of inclusive spaces such as festivals, independent bookstores and art spaces. Such spaces have proved formative for new and emergent artists and cultural professionals to find

a role and a voice. Municipal governments are called upon to play a dynamic role in enabling culture-led renewal in the coming years, supporting independent cultural practice as the bedrock of sustainable creative cities.

4.3 Building an ecosystem-wide approach. A systematic approach to global collaboration and exchange can help integrate the range of challenges into targeted cooperation strategies, recovery plans and longer-term approaches which reframe culture at the heart of sustainable development and inclusive growth. Peer-to-peer exchanges and knowledge transfer is needed at every level – from inter-ministerial to artist exchange: including North–South, South–South and North–South–South cooperation. Overall, cultural relations activities will benefit from a reframing to prioritize cultural development which is genuinely mutual and based on shared purpose towards shared impact.¹³⁵

5. CRAFTING A NEW VALUE PROPOSITION FOR CULTURE AS A FOUNDATION FOR A MORE RESILIENT AND SUSTAINABLE SOCIAL, ECONOMIC AND ENVIRONMENTAL FUTURE

The COVID-19 pandemic has shifted public perception of the value of culture. This presents an opportunity to reframe the strategic approach to culture, positioning culture and creativity as foundational to a sustainable ecosystem built on health and well-being, social cohesion, inclusion and environmental responsibility.

This will involve integrated strategies to promote the role of culture for the achievement of the 2030 Agenda for Sustainable Development. Governments, for example, can mobilize culture and creativity to drive societal transformations, as part of the growing global trend in “policy engagement harnessing culture for sustainable development”, highlighted by the United Nations Secretary General Report on Culture and Sustainable Development.¹³⁶ The culture sector can directly and indirectly contribute to 17 of the SDGs and the 2030 Agenda for Sustainable Development. For instance, cultural expressions have the potential to build greater understanding of climate change and unlock policy engagement with environmental issues.¹³⁷ Culture can also support sustainable urban and rural development. Artists, creators and other cultural professionals are adept at finding new solutions and identifying ways for systems to be renewed and recovered, which could lead to a holistic reframing of what we value and how we live together and plan for the future.¹³⁸

The culture sector can also be leveraged to generate new jobs and wealth in the context of growing digitization and automation, securing inclusive economic development. Unlike many other sectors where the growth of digitization and the advent of machine learning reduces the need for traditional human skills, the culture sector continues to depend upon people’s cultural sensitivity, social skills and creative vision. The near ubiquity of handheld digital devices in many regions, and increasingly accessible and affordable internet connections are now bridging the gap between

traditional craft industries, informal cultural activity and world markets. Many artists and craftspeople sold their creations online during the COVID-19 pandemic. However, new skills and ways of working are being held back by outmoded regulatory structures, ineffective protection of intellectual property and lack of access to skills development and business support for culture sector MSMEs.¹³⁹ The low levels of formalization – with much of the culture sector in the grey economy – also hampers opportunities for investment and for scaling-up parts of the value chain. Policy solutions need to ensure informal cultural work is not marginalized, and that it can be supported to develop towards a more formal footing, with incentives rather than neglect the way forward.

Most artists and people in the culture sector in Senegal or West Africa are not in the formal sector. The challenge is that even if the government was trying to help, those people who are working in informal jobs cannot benefit from that help.

Aisha Deme, Chairwoman and Founding Board Member, Music in Africa NGO



FINAL REMARKS:
TOWARDS A COLLECTIVE REBUILDING OF
THE FOUNDATIONS OF CULTURE

“Early in the pandemic, author Arundhati Roy noted that the crisis had created a portal through which we can reimagine – and fight for – the world anew. Anything is possible again. It was a call to action that resonated with many working for change around the world”.¹⁴⁰

The COVID-19 pandemic has triggered a reflection on what we value, our shared needs and shared future. It has made more acute the need to act together to tackle major societal and environmental issues. There is no going back to ‘normal’; going forward, a new path needs to be forged collectively to build a sustainable future.

The culture sector – with its inherent creativity – holds within it the seeds of its revival and those of the wider society and economy. Many organizations and cultural professionals have responded to the effects of the pandemic with fortitude and imagination, adapting models and practices and pivoting to new ways of working, of value creation and impact-making. In society at large, there is a growing appreciation of the culture sector’s social value, and within the sector itself there is increased connectivity and solidarity.

For some parts of the global culture sector, the conditions created by the COVID-19 pandemic have unlocked new opportunities for innovation and a more inclusive growth. However, the reality for most artists, cultural professionals and cultural organizations is incredibly perilous, and especially so for young people, women, minorities and those with disabilities. Many governments are yet to pivot from a mindset of ‘rescue’ to one which reframes the value proposition for culture and, in doing so, remodels strategic investment where culture is foundational for sustainable development. Only a few are ready to develop models which support the full diversity of talent and attend to the structural inequalities which have for so long held some of the best

There was a growing understanding that culture is not a luxury. That culture was actually essential for how people survived in an incredibly difficult time. There was a new recognition, and people started to understand that so much else was being lost, and that culture was a thing that they could hold onto. And so, I think it raised awareness that it was music, and film, and TV, and online theatre pieces that helped people to get through.

Bill Bragin, Executive Artistic Director of the Arts Center, NYU Abu Dhabi

talent back. Still fewer are attending to historic gaps in the profile of those in leadership roles, with, for example, too few women or minorities in positions of influence with regard to the role of culture in sustainable development.¹⁴¹

United by a common goal – a diverse, thriving and resilient global culture sector powered by the diversity of cultural expressions – and with a set of clear priorities and action areas to focus on, stakeholders can seize this moment for change and build a society and economy which has culture as its foundation.

APPENDIX

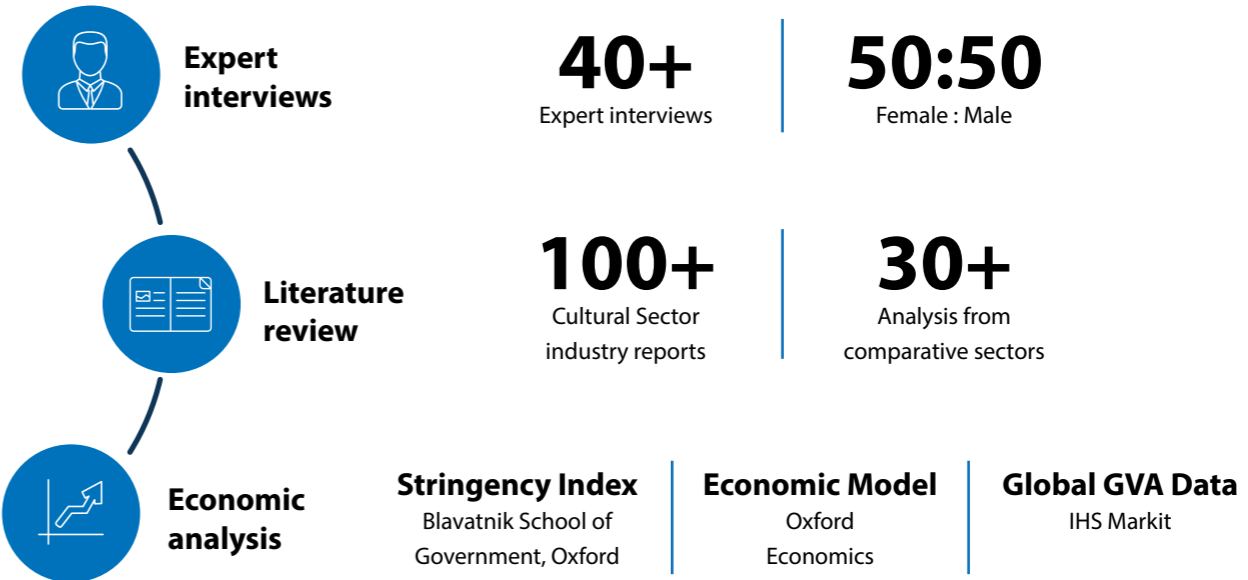
Methodology

This report makes use of a mixed-method approach to build on an existing body of research. The pillars of this mixed-method research include a literature review, expert interviews, and an economic analysis, as outlined in Figure 8.

This study builds on a knowledge base of research related to COVID-19 across various global industries, businesses, and communities. A wide-ranging literature review draws on more than 100 diverse sector-specific and more general reports.

Use is also made of the UNESCO tracker of government COVID-19 responses. Interviews were conducted with more than 40 global experts, and their insights were used to build a picture of the impact of COVID-19 on the culture sector. Figure 8 shows the extensive coverage of culture sector domains and regions captured in the literature review and expert interviews. These sources are supplemented by quantitative analyses based on data from Oxford Economics and IHS Markit, which guided the identification of trends and tendencies.

Figure 8: The analyses are based on three data sources

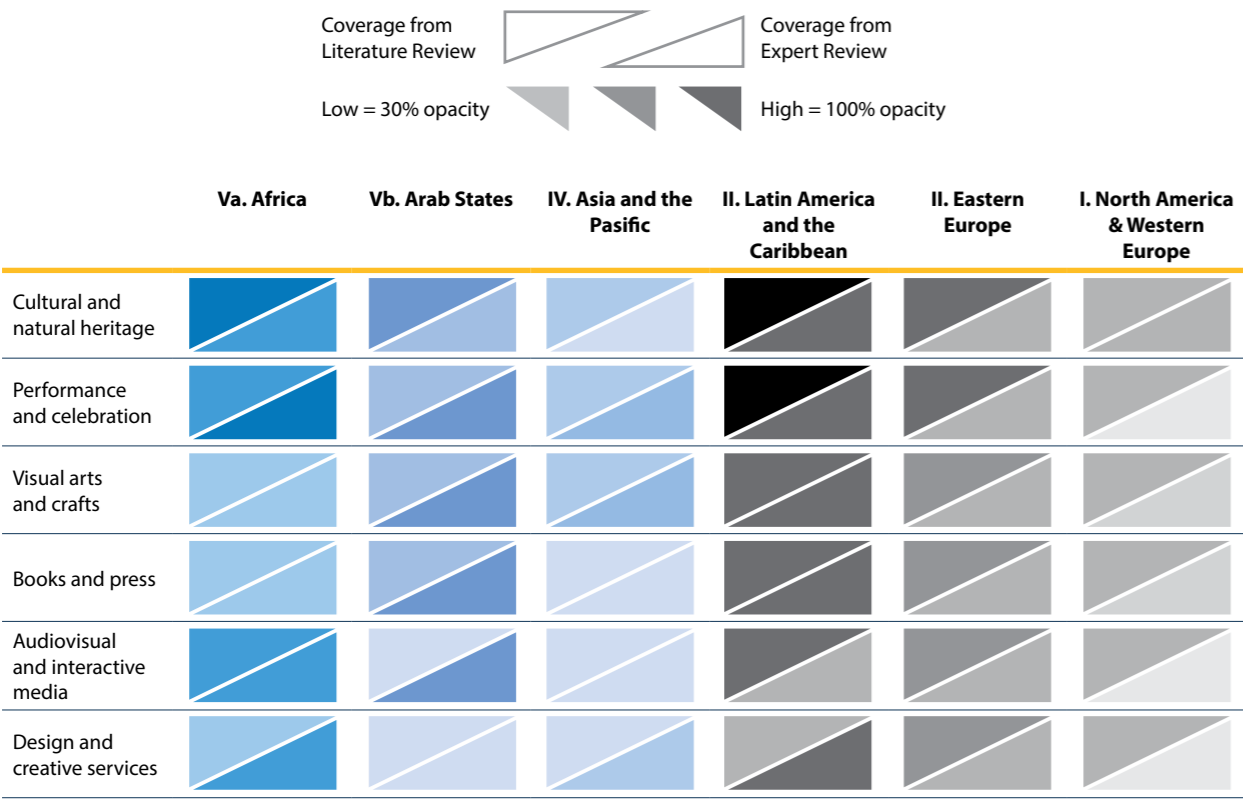


Sources

While efforts have been made to cover all domains and regions to the greatest extent possible, the gaps in the literature and data on the Global South and the Arab States, in particular, must be acknowledged. To address this imbalance, more than 40 interviews were conducted with artists and cultural professionals worldwide to provide a snapshot of experiences globally. Indeed, a specific analysis was undertaken to reflect

the impact and responses observed in developing countries, however limitations in available data prevented an equal analysis across all regions. The research conducted in the framework of this report has further highlighted the need to redress imbalances in data and knowledge in the Global South and invest in standardized data collection across all regions.

Figure 9: Mapping of sources by cultural domain and UNESCO region



Literature Review

The precondition for sound strategic planning is a clear understanding of circumstances. To understand the forces at work in the global economy during the pandemic and the related challenges and opportunities, a range of research from various industries was accessed, including research focused on work, mobility, talent, digitization, ESG (environmental, social and governance), business models and consumer behaviour. Research that describes sector-agnostic global trends up to 2030 was also consulted, thus tracking how the environment beyond the culture sector is evolving in response to the pandemic, and how other global sectors tackle topics like talent retention and acquisition, digitization and automation. Work on priorities for organization leaders in the 'next normal' also helped to shape this report's approach to recovery and transformation in the culture sector.

As a starting point, 100 reports, dating from March 2020 to February 2022, were identified as sources for a comprehensive understanding of the impact of the COVID-19 pandemic

on all cultural domains. These were clustered into four groups: impact assessment of COVID-19; anti-crisis action recommendations; resilience building in the culture sector; and the culture sector as a driver of recovery.

Across these four groups, 30 reports were selected for further analysis, with a focus on:

1. Major organizations and associations with a global, regional and cross-domain lens.
2. Deeper domain understanding (for example, a global survey of museums).
3. National-level analyses to supplement the findings in points 1 and 2.
4. Selected academic papers that fill gaps regarding the social impact of the culture sector during the COVID-19 pandemic.

Each report was analysed with the goal of collecting three types of information: quantitative data on the impact of the COVID-19 pandemic on culture sectors, with examples; trends that have emerged from the pandemic and shaped the sector; and future actions to address the opportunities and challenges arising from the pandemic.

In particular, UNESCO and the European Union are originators of much valuable research on the culture sector, as well as North American institutions and organizations. Especially influential works consulted include 'Cities, Culture, and Creativity,' a 2021 paper from UNESCO/World Bank, which draws on global studies and the experiences of nine diverse cities around the world; UNESCO's 2021 'Cultural and creative industries in the face of COVID-19,' which focuses on measuring the global economic impact of COVID-19, and its 2020 'Culture in Crisis: Policy guide for a resilient creative sector,' which presents examples of good practice by governments, civil society and the private sector; 'Rebuilding Europe, the cultural and creative economy before and after the COVID-19 crisis,' a study commissioned by the European Grouping of Societies of Authors and Composers (GESAC)¹⁴²; 'Cultural and creative sectors in post-COVID-19 Europe,' a report from CULT Committee of European Parliament; and 'Culture shock: COVID-19 and the cultural and creative sectors,' a July 2020 OECD paper which analyses the economic impact of the pandemic on the culture sector, and brings together various countries' responses by leveraging national statistics.

Other diverse papers originated from academics, psychologists and culture sector organizations and practitioners, including at the local level. Overall, most of the published research uses an economic lens to examine COVID-19 impacts, while social and people-focused lenses are less commonly applied. Governmental measures are seen as the most important enabler to support the sectors' relief and future development throughout the literature examined.

Expert interviews

Around 40 interviewees were selected to provide insights to complement the analyses stemming from the literature review, drawing from a wide pool of culture sector experts and practitioners from relevant associations, cultural institutions, regulators and entrepreneurial backgrounds.

Interview partners were chosen based on their strong expertise in a specific domain and region beyond their own organization. Coverage was broad, including all regions and culture sector domains, but with an emphasis on the Global South in an attempt to better understand challenges faced by this region as a result of the pandemic. Around 30 per cent of interviewees were from Latin America and Africa, and only 15 per cent from North America and Western Europe. To account for gendered difference in perceptions of the repercussions of the pandemic, 50 per cent of the interviewees were women across most culture sector domains and regions.

To get a sense of overall impact as well as domain-specific subtleties, interviews followed a guide that aimed to strike a balance between open-ended questions and clearly targeted ones. Questions were structured to explore the impact of COVID-19 on an organization and sector, encouraging extensive replies in an open format. They were also designed to help evolve and challenge perceptions of trends initially derived from the literature review. Close attention was paid to separating trends which were already in motion prior to the pandemic from those which had been brought about by COVID-19. Questions also touched on gender inequalities in light of the pandemic, and on broader societal challenges in the context of diversity and inclusiveness.

Quantitative economic analysis

Industry GVA data from Oxford Economics was leveraged to provide objective and consistent measurements across countries and industries, as well as statistical evidence for the impact of the pandemic. This historical and current data has been used to generate alternative recovery paths for countries worldwide.

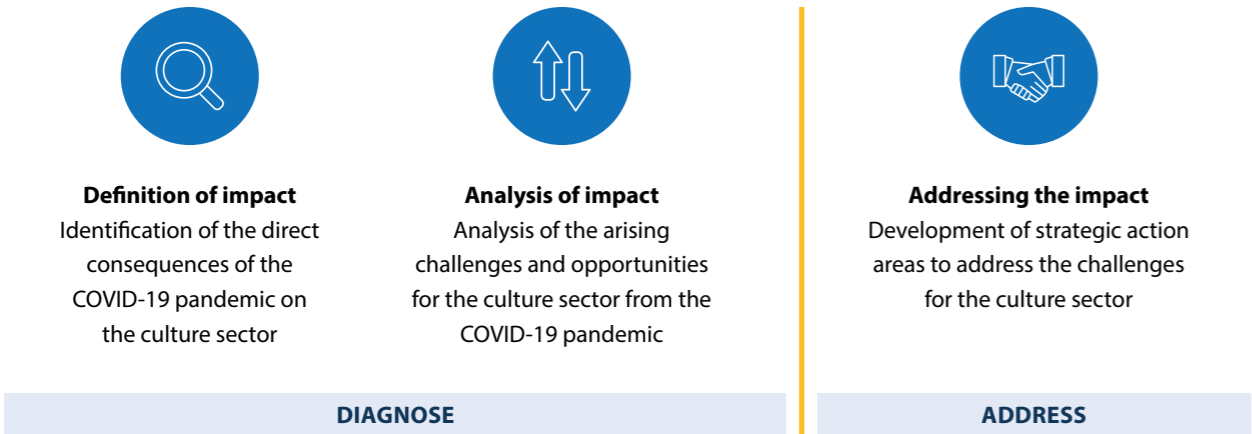
This analysis has three dimensions: cross-sector, cross-regional, and sector-specific value-add:

- 1. A cross-sector comparison of the impact of the pandemic from 2019 Q4 (the pre-pandemic peak) to 2020 Q2 (the trough in global GDP), before recovery began – albeit modestly – in 2020 Q3.
- 2. A cross-regional comparison of the pandemic’s impact on the culture sector by quarter in 2020.
- 3. An examination of growth in the sector’s value-add from 2017 to 2021, providing a longer-term view of pandemic impact and recovery thus far.

Strategy

The culture sector analysis strategy was twofold (Figure 10): an initial diagnostic phase followed by a phase of developing measures to address the ramifications of the COVID-19 pandemic for the culture sector. The diagnostic step included both a definition of the characteristics of the impact of COVID-19 and an analysis of these impacts on the worldwide economy and on the culture sector specifically. This allowed the deduction of opportunities and challenges that have arisen from the pandemic. The second phase was aimed at addressing challenges for the culture sector specifically via the development of strategic action areas.

Figure 10: **Visualization of strategy for analysis of the impact of COVID-19 on the culture sector**



Scope

To structure the analysis, UNESCO’s definitions of six geographical regions (Figure 11) and six culture sector domains (Figure 12) have been adopted predominantly. GVA figures have been calculated on the basis of four International

Standard Industrial Classifications (ISIC) which do not cover the full spectrum of domains of the UNESCO culture statistics framework.

Figure 11: **UNESCO regional distribution by electoral groups**

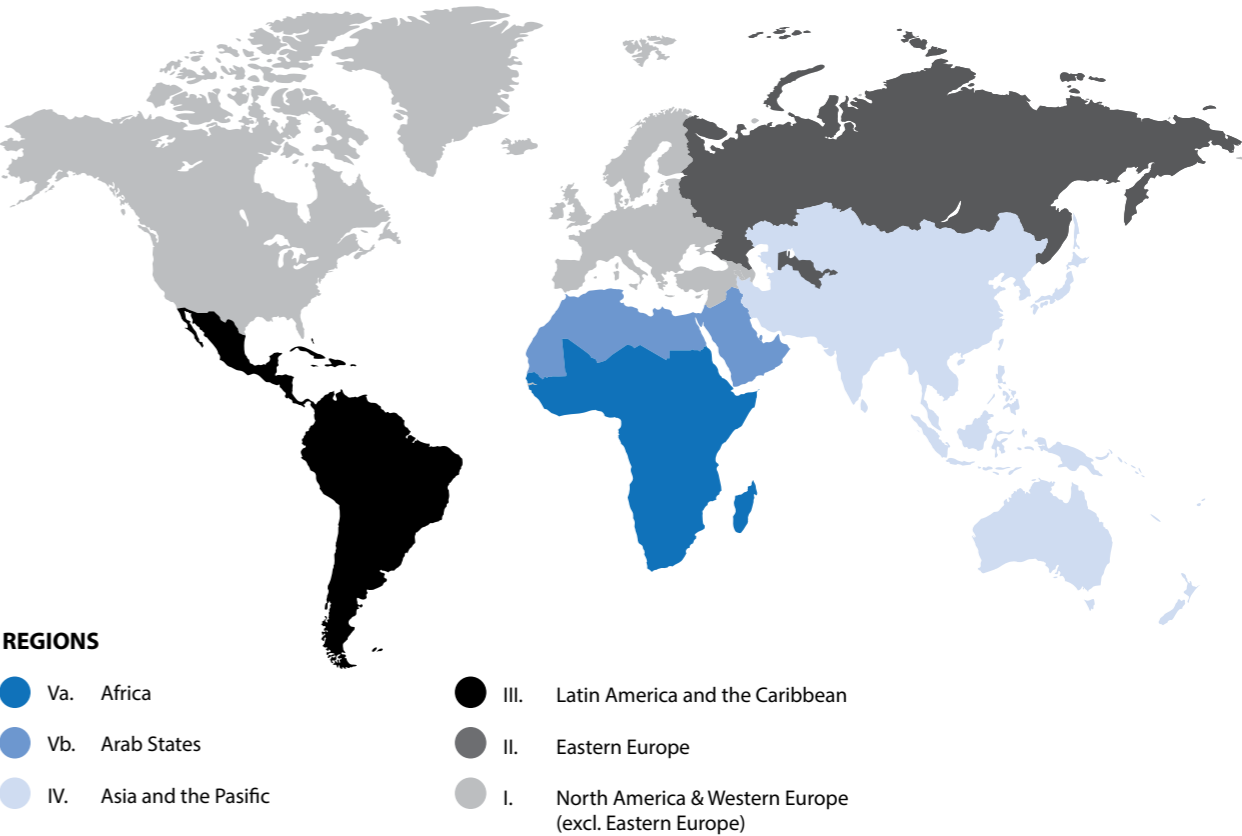
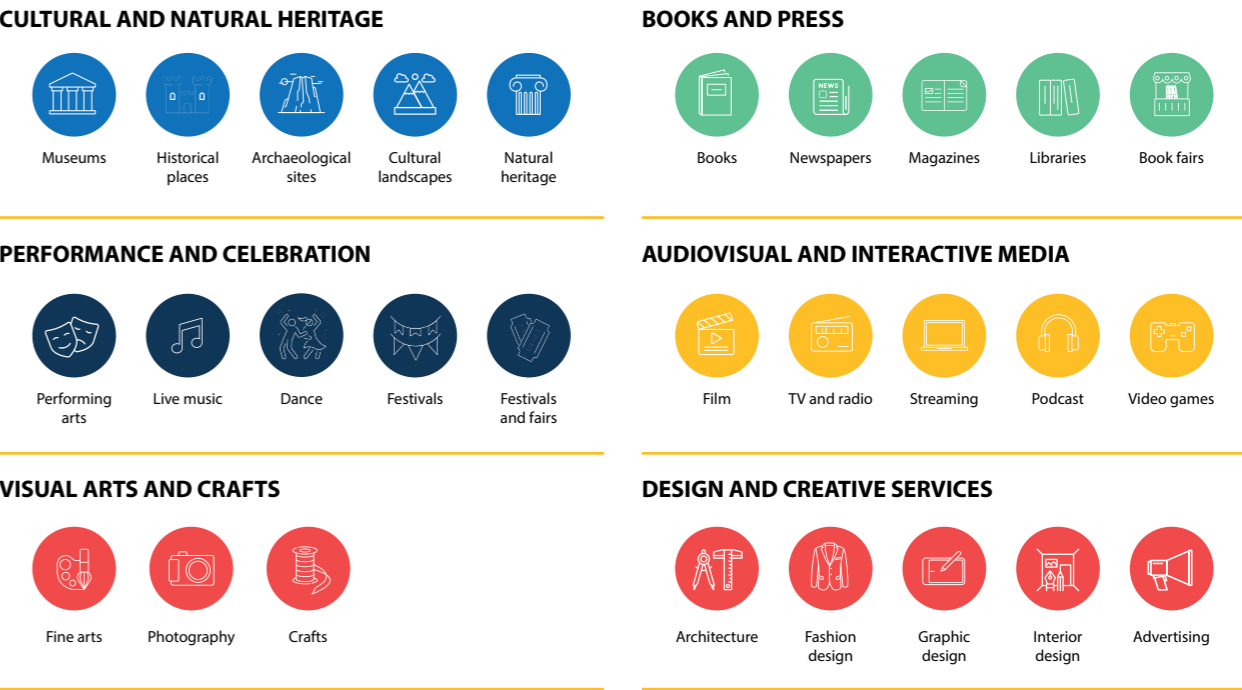


Figure 12: **2009 UNESCO framework for cultural statistics**



ACRONYMS

CENDANA: Cultural Economy Development Agency, Malaysia	NEMO: Network of European Museum Organizations
CISAC: International Confederation of Societies of Authors and Composers	NFT: non-fungible-token
CULT: European Parliament Committee on Culture and Education	NGO: non-governmental organization
DCT: Department of Culture and Tourism - Abu Dhabi	OECD: Organization for Economic Co-operation and Development
EUNIC: European Union National Institutes of Culture	OEI: Organización de Estados Iberoamericanos para la Educación, la Ciencia y la Cultura
G20: Group of Twenty	SACEM: Society of Authors, Composers and Publishers of Music
GDP: gross domestic product	SDG: Sustainable Development Goal
GVA: gross value added	SEGIB: Secretaría General Iberoamericana
ICOM: International Council of Museums	SVoD: subscription video-on-demand
IFACCA: International Federation of Arts Councils and Culture Agencies	UCLG: United Cities and Local Governments
ILO: International Labour Organization	UNESCO: United Nations Educational, Scientific and Cultural Organization
ISIC: International Standard Industry Classification of all Economic Activities	UNIDO: United Nations Industrial Development Organization
MERCOSUR: Southern Common Market	UNWTO: United Nations World Tourism Organization
MONDIACULT: UNESCO World Conference on Cultural Policies and Sustainable Development	VoD: video-on-demand
MSME: micro-, small, and medium-sized enterprises Nasdaq: National Association of Securities Dealers Automated Quotations	WIPO: World Intellectual Property Organization

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ENDNOTES

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