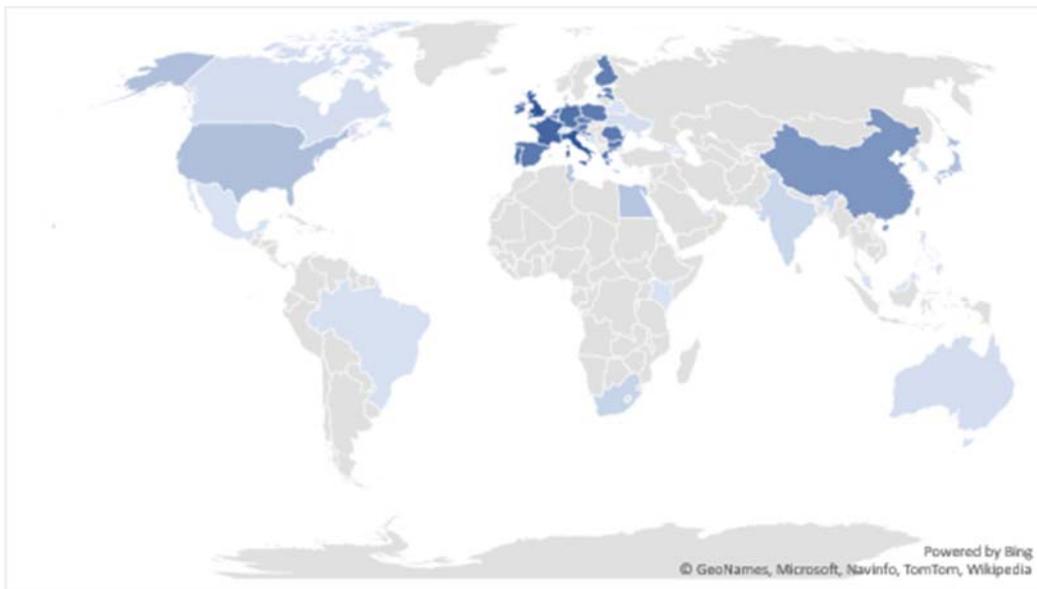


CULTURAL RELATIONS PLATFORM

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The Assessment of the Impact of COVID-19 on the Cultural and Creative Sectors in the EU's Partner Countries, Policy Responses and their Implications for International Cultural Relations



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EXECUTIVE SUMMARY

The COVID-19 pandemic has deeply impacted economies, societies and political systems worldwide. Culture as a sector and as a practice in international relations has not been exempted either. Indeed, the social, political and economic characteristics of the pandemic have had deep implications for culture and its role in international relations. Preliminary evidence on the impact of COVID-19 on the cultural and creative sectors (CCS) in partner countries – the Neighbourhoods, the Western Balkans, and the Strategic partners – and on their capacity and willingness to conduct international relations (IR), together with an overall analysis of the policy responses put in place by state and non-state actors to limit such an impact, are provided in this report.

Impact

Given the nature of the CCS and the cultural “ecosystem” in which cultural practices and policies are embedded, a comprehensive assessment of the impact of COVID-19 on the CCS is difficult both methodologically and theoretically. However, some insights were drawn based on the initial data gathered from the EU partner countries:

- ➔ The initial survey data confirms that in several partner countries (e.g. India, Brazil, Tunisia, and Kosovo,² just to mention a few **cultural actors are among the most vulnerable groups in the economy**, and that the CCS is extremely sensitive to the vagaries of the market and to the socio-political situation since it lacks robust counter-cyclical tools (OECD, 2020). Among the characteristics that make this sector particularly weak are:
 - The unstandardized form of many jobs in this area and the parcellated nature of its economic structure. Many cultural workers are **self-employed** or are part of a **small enterprise**, and frequently have a precarious or non-standard form of work (i.e. the informal economy), meaning the vast majority are subject to precarious forms of employment. This means that they often have limited access to traditional funding sources and that they presumably do not meet the eligibility criteria for main relief and recovery measures.
 - Not only is the **job market extremely exposed to any form of social uncertainty or economic shock**, but it is also highly difficult for such a job market to cope with these shocks and turbulences and to find the appropriate form of public and private support when this is the most needed.
- ➔ The **impact of the COVID-19 pandemic was severe and affected all partner countries**. For the countries whose survey data is available (e.g. the United States, South Africa, Brazil, Canada, India, China, Georgia, and Ukraine), it is possible to state that the nature and “relative magnitude” of the impacts have been similar:
 - The **COVID-19 crisis affected the core activities of many cultural organizations**, with a widespread cancellation of scheduled events.
 - Organizational implications included the **temporary or permanent closure of activities, temporary or permanent staff reductions, and the cancellation of local and international trips**.

² This designation is without prejudice to positions on status and is in line with UNSCR 1244(1999) and the ICJ Opinion on the Kosovo declaration of independence.

- Organizations have also been **financially impacted**, with a dramatic reduction of income, reduced access to financing, and a diminishing of co-financed project opportunities.
- ➔ It is almost **impossible to predict when and how a recovery of the CCS in partner countries** will take place. It is also hard to estimate both the role and contribution of the cultural sector to national economies and to the world economy, and the amount of personnel employed in the sector. Furthermore, there is wide variety of situations across the geographical regions of the world partner countries are part of (as an example, within the EU between East and West), within each country (such as between the capital city and the other regions) and across sectors (the music or movie sector as compared to museums or performing arts). Most likely, the **recovery will depend on a number of factors**, including:
 - The **evolution of the pandemic** and the magnitude and extent of confinement and social distancing measures;
 - Advances in terms of **therapy and vaccination**;
 - The **policies launched in favour of CCS** in the various countries;
 - Access to the **digitization process by CCS operators**;
 - The nature and characteristics of each cultural sub-sector;
 - The evolution of **multilateral cooperation** (a strengthening of isolationist and power politics trends will further slowdown the recovery path of the cultural sector and the entire global economy).

Policy responses

- ➔ In most partner countries, the public sector, cultural organizations, and private actors **developed some form of policy response**. The scope and complexity of these measures vary substantially, depending on the financial resources available, the different relationship between public authorities and the cultural sector, and country-specific political choices in acknowledging and dealing with the health emergency.
- ➔ This study offers a **first assessment of measures undertaken by governments in the EU member states and in the partner countries to address the social and economic implications of the pandemic and to provide relief and recovery to the creative and cultural sectors**. The data collection produced more than **seven hundred policy responses in fifty-four states**, plus an assorted set of initiatives by international organizations and EU institutions. Based on this dataset, some overall considerations are possible:
 - **Economic measures represent the prevailing policy response to the challenges of COVID-19**. 80% of all policy measures recorded are economic in nature, and direct disbursements of resources have been the main way these economic measures have been implemented.
 - # More than half are direct measures and have to do with the disbursement of grants, loans and cash transfers. Only a fifth of the measures are related to indirect support, under the form of exemptions, referrals of obligation and fiscal measures.
 - Based on the available data, it can be estimated that **approximately 200 billion euros have been spent to support the CCS in the countries under scrutiny**.
 - # 80% of the disbursements over 10 billion Euros have been provided by EU member states and European institutions, while the rest is from China. Instead, 79% of the disbursements in the Neighbourhood countries are less than 5 million Euros in size

- on average.
- Based on the available data, it seems that **not all cultural sub-sectors have benefited from the same resources**. The audiovisual, film and performing arts sectors are those that have received the greatest attention, while visual arts the least.
 - # 56% of all interventions have addressed problems related to the audiovisual and film industries, followed by 48% of interventions addressing the problems of the performing arts. Only two out of ten of the interventions have addressed issues related to visual arts, while the other sectors lay in between. This scenario varies depending on the priorities of national, inter-governmental, and non-governmental actors as well as on the composition of the CCS in each and every partner country.
 - ➔ During the crisis, **non-state actors have played an important role in mitigating the risks and in alleviating the negative economic and social impacts of COVID-19**. In many countries, **civil society** has often performed an advocacy role which has proven crucial in convincing the government to take specific measures regarding the cultural sector. Furthermore, in several partner countries, **regional and local authorities** have played a key role in interacting with civil society and preparing emergency measures to support the cultural sector.
 - ➔ *This research shows that*, despite commitments, **government and non-government actors are unlikely to come to the rescue as much as is necessary**. In many countries the available resources of government actors, and quite often of non-government actors, are inadequate for the challenge. However, while direct and indirect economic assistance is greatly needed, the evidence shows that **cultural actors also require non-economic support in the recovery phase**.
 - ➔ Finally, *the data shows* that the emergency ignited by the outbreak and the restriction measures that followed, is also **affecting the capacity of cultural actors to conduct international cultural relations**. State and non-state actors are trying to mitigate this risk or have already taken measures to support the resilience of ICR. On the one hand, any public or private measure aimed at supporting cultural practitioners and cultural organizations at the national level – from grants and loans to technical support – is indirectly helping to preserve the capacity of cultural actors to project their activities and relations beyond national borders. On the other hand, some public authorities and private philanthropies are tailoring their emergency and recovery response mechanisms to the specific needs and functioning of ICR.

RATIONALE FOR THE STUDY, BACKGROUND AND OBJECTIVES

The COVID-19 pandemic has deep and potentially disturbing implications for culture, its role in international relations, its capacity to support knowledge-based economies and foster exchanges based on trust, solidarity, and cooperation.

A problem that must be faced in assessing the impact of COVID-19 on international cultural relations (hereafter referred to as ICR) is that there is as of yet no substantial and systematic mapping of the state of the EU's international cultural relations before the current crisis.³ This raises the issue of how to conduct an assessment of impact if a baseline is lacking. To address this issue, the Consortium responsible for the execution of the Cultural Relations Platform,⁴ whose ultimate purpose is to support the achievement of EU Foreign Policy objectives by strengthening the EU's ability to engage meaningfully with different audiences and stakeholders in third countries through ICR activities, has committed to providing an overall analysis and assessment of the impact of the COVID-19 crisis on the cultural and creative sectors (hereafter referred to as CCS) of the EU and its partners, as well as their ICR over the short- and long-term.

This report, intends **to map and identify the impact of COVID-19 on the capacity of the CCS in partner countries (and in the EU) to conduct ICR.**

The overall objective of the research activity is to analyse, assess and address the impact of the COVID-19 crisis on the EU's international cultural relations (ICR).

The report includes the following activities:

- I. An inventory and map (ScR) of the available research on the impact of COVID-19 on the cultural sector(s) (hereafter mentioned as the “**Scoping review**”)
- II. A systematic mapping and analysis of the **policy responses** by governmental and non-governmental actors to the impact of COVID-19 on the cultural and creative sector(s) in the EU and in partner countries, and
- III. An assessment, based on secondary data, of the economic, social, political and cultural **impact of the pandemic on ICR**, with a particular focus on the EU's external cultural relations and partner countries.

The present report explores the overall results of this three step process. Accordingly, the report is structured as follows:

1. *General information* is given regarding the methodology adopted to conduct this research.
2. The *impacts of COVID-19 on the CCS in partner countries* are discussed and the results of a survey fielded to the Alumni of the Global Cultural Leadership Programme are presented.
3. *Policy responses put in place by governmental and non-governmental actors* to support CCS and foster ICR during the pandemic in partner countries are described and analysed, both at the aggregate and at the sectoral, regional, and country levels.
4. A set of *eight country case studies* (Ukraine, Serbia, Morocco, Tunisia, the United States, China, Brazil, and India) is offered, alongside an in-depth analysis of impact and policy

³ The best attempt at this was the Preparatory Action carried out in 2013-14. To learn more: https://ec.europa.eu/assets/eac/culture/library/publications/global-cultural-citizenship-sum_en.pdf

⁴ The Consortium operates under the coordination of the Goethe-Institut and it is composed by the European Cultural Foundation (ECF), the International network for contemporary performing arts (IETM), and University of Siena.

responses.

5. An overall *analysis of the impact of COVID-19 on the EU's ICR* (with partner countries), together with an overview of the main policy responses specifically targeting cultural relations, is given.

METHODOLOGICAL NOTES

As anticipated, the research process consisted of three distinct stages: a scoping review, the mapping and analysis of policy responses, and the impact assessment. The following is a brief description of the **general methodology** driving the overall research effort.

The data collection was iterative, relying on different collection tools and covering a variety of sources. The overall efforts took place between early June and early September 2020.

A first phase (early June – early July 2020) concerned the inventory and mapping of available studies, reflections, recommendations and data collection on the impact of COVID-19 on the CCS and on the EU's ICR, and was conducted through a *scoping review*⁵ (ScR), which is a kind of literature review. The implications for the capacity of these sectors to engage in international cultural relations were also considered.

The **ScR** was preliminary to a mapping of key policy responses governmental (public sector) and non-governmental actors of the EU, the Southern and Eastern Neighbourhood countries, and strategic partners are taking to limit the human and economic impact of the COVID-19 pandemic on the CCS. Such a mapping was conducted in three different steps between early July and early September 2020:

1. A **screening** of available online repositories to capitalize on the efforts of existing policy trackers (e.g. those by KEA,⁶ the European Audio-visual Observatory – EAO⁷, and the Compendium of cultural policies and trends⁸).
2. A **collection** of policy responses and publicly available information on indicators of government and inter-governmental organizations' (IGOs) responses in the CCS, especially in partner countries.
3. To address any gaps in the online data collection, **offline data** was gathered, including data coming from relevant Directorates-General (DGs) of the European Commission (EC) and knowledgeable people in the sector. In addition to the acquisition of secondary sources, in the offline phase primary data was collected through semi-structured qualitative interviews with a group of regional experts, who ensured full and detailed geographical coverage. The experts supported the data acquisition process, complementing information from their respective regions and countries.⁹

➔ The geographical scope of the research was the following: the European Union (EU), the

⁵ This review adopted the methodological framework originally proposed by Arksey and O'Malley (2005) and further enhanced by Levac, Colquhoun and O'Brien (2010). Furthermore, the overarching approach substantially adheres to the methodology for scoping reviews developed by the Joanna Briggs Institute (2015).

⁶ <https://keanet.eu/research-apps/c19m/>

⁷ <https://www.obs.coe.int/en/web/observatoire/COVID-19-audiovisual-sector-measures>

⁸ <https://www.culturalpolicies.net/COVID-19/comparative-overview-financial/>

⁹ The regional experts are Tetiana Biletska (Neighborhood East), Milena Dragičević-Šešić (Western Balkans), Fatin Farhat and Mourad Sakli (Neighborhood South), Pedro Affonso Ivo Franco (Latin America), Moukhtar Kokache (the United States), and Anupama Sekhar (Asia)

Western Balkans, the ten strategic partners of the EU (Brazil, Canada, China, India, Japan, Mexico, Russia, South Africa, South Korea, and the USA), and Southern and Eastern Neighbourhood countries.

INTRODUCTION: THE COMPLEX NATURE OF THE CULTURAL SECTOR

Over the last years, culture and creativity have come to represent a significant economic sector which accounts for **5.4% of global employment** (ILO).

- # According to the latest statistics available, in 2013, the culture and creative sector generated 2,250 billion dollars in revenue and accounted for 29.5 million jobs globally, i.e. 1% of the world's active population. In the same year, CCS were commonplace worldwide, making the sector truly global, with Asia-Pacific ranking first (743 billion dollars and 12.7 million jobs), followed by Europe (709 billion dollars and 7.7 million jobs), North America (620 billion dollars and 4.7 million jobs), Latin America (124 billion dollars and 1.9 million jobs), and Africa and the Middle East (58 billion dollars, 2.4 million jobs). (Lhermitte et al. 2015:89). Although lacking reliable and recent data, when looking at global trends in the global trade of creative goods, it can be safely assumed that this worldwide trend of the CCS before COVID-19 was going on unabated. UNCTAD (Kuku et al. 2018:20) estimated that the creation, production and distribution of creative goods generated an average annual growth of about 7 percentage points over the 2003-2015 period, with global exports of creative goods increasing from 208 billion dollars in 2002 to 509 billion dollars in 2015.

In conclusion, the **CCS represent an economic sector that has continued to demonstrate high potential**. However, the sector has also been afflicted by structural vulnerabilities that make the assessment of the impact of COVID-19 difficult.

Defining the cultural and creative sectors as “...all sectors whose activities are based on cultural values or art and other individual or collective creative expressions...” including “...the development, the creation, the production, the dissemination and the preservation of goods and services which embody cultural, art or other creative expressions, as well as related functions such as education or management.”¹⁰ (European Commission, 2018b:21), and cultural policy as a set of “regularized actions” through which both private and public actors promote a broad set of activities related to culture, there are four characteristics that make this sector not very resilient worldwide (OECD, Travkina et al. 2020:5).

- I. **First, the sector's ecosystem is characterized by a crucial and highly consequential asymmetry between the supply and the demand sides.** On the one hand, the demand for cultural services and products is economically concentrated in public institutions and large private players (in different combinations depending on the countries involved, e.g. the US and France for two extreme examples), while the supply of practices and products is, to an extent, depending on the cultural sector involved, a microcosm of private, self-employed professionals and/or micro-firms. In assessing the resilience of the cultural sector to the consequences of COVID-19, this intrinsically weak and complex socio-economic structure of the supply side, as well as the mainly concentrated nature of the demand side cannot be ignored.
- II. **Second, the CCS is extremely sensitive to the vagaries of the market and to the socio-**

¹⁰ The Regulations provide for a list of the main cultural and creative sectors: “The sectors include architecture, archives, libraries and museums, artistic crafts, audiovisual (including film, television, video games and multimedia), tangible and intangible cultural heritage, design (including fashion design), festivals, music, literature, performing arts, books and publishing, radio, and visual arts.” - European Commission, 2018:21.

political situation, as well as missing robust counter-cyclical tools. In this regard, at least four considerations are worth noting to explain why the sector is so exposed and structurally weak:

- a. The **unstandardized form of many jobs** in this area and the parcellated nature of its economic structure. As reported in the recent OECD report on COVID-19 and the cultural sector (2020), the creative industry is comprised of a myriad of micro-firms and self-employed professionals, with either precarious or part-time jobs with peculiar contractual forms that regulate the sector;
 - b. Contrary to the many workers in the gig economy, those employed in the cultural sector are both in a **precarious position, self-employed** (often relying on a second job to survive), and, at the same time, **highly skilled**;
 - c. Not only is the job market extremely exposed to any form of social uncertainty or economic shock, but it is also very difficult for such a job market to cope with these shocks and turbulences, and to find the appropriate form of public and private support to the sector when this is most needed. In other words, the **CCS is at the same time extremely sensitive to potential shocks while finding it very difficult to be helped out of these shocks**, with this lack of access to safety nets reducing the resilience of the sector (UNESCO, 2020l);
 - d. The cultural sector is mainly supported by government and private bodies via institutions, not directly to individuals. The consequence is that a **reduction in either public or private funding (or both) is highly likely to vastly affect the sector**. These detrimental economic effects are further magnified, in the case of the pandemic, by the reduction in the demand for services and products by the consumers of the sector, both as a direct consequence of the economic crisis on the consumption of cultural goods and products in general, and indirectly as an effect of social distancing that makes it extremely hard for some sectors (e.g. the performing arts) to survive.
- III. *Third*, to complicate an already exceedingly intricate situation, official statistics have a hard time capturing these jobs' contribution to wealth. **This is because it is difficult to estimate both the role and the contribution of the cultural sector to national economies and to the world economy** as a whole, alongside the amount of personnel employed in the sector, especially in the Neighbourhood South.¹¹ This, of course, makes any assessment of the impact of COVID-19 problematic at the least. As reported by Eurostat (OECD, 2020:6), there is a systematic tendency to underestimate the number and contribution to the national wealth of those employed in the cultural sector, which is so due to two reasons: the difficulty of determining the cultural component of several non-mainly cultural sectors and the nature of the contracts that regulate the sector. Also, the overall productivity of the sector is much harder to assess than other jobs. On top of that, many jobs in the creative and cultural sector, especially in emerging countries, simply escape the official estimates of GDP and fall into the **informal economy**, especially in the performing arts (Lhermitte et al. 2015:9). Finally, it is highly difficult to quantify the impact of COVID-19 on the intangible contribution that the cultural sector produces for society, for example the value of the processes related to living heritage and intangible heritage (UNESCO, 2020a).
- IV. *Fourth*, this complexity is further magnified by the **wide variety of situations across the**

¹¹ In-depth interview with regional expert

geographical regions of the world under scrutiny (as an example, within the EU between East and West), within each country (such as between the capital city and other regions) and across sectors (the music or movie sector as compared to museums or performing arts). As argued by Ruth Towse (2019), the term creative and cultural sector itself encompasses a group of activities that have different ways of producing, reaching the consumer, and organising their work. This means that any **attempt to measure the impact of the pandemic should take into account the differential impact of the lockdown measures on each sector, the different sizes of each sector, and the diverse forward and backward multiplier effects of each sector for each and every country under scrutiny** (South African Cultural Observatory, 2020:42). The term CCS itself arises from the need of the state to calculate the contribution of the sector to the gross domestic product and carry out the necessary policy interventions. These interventions often do not take into account the substantial differences between one sector and another, which means that in many cases some cultural sectors have been able to benefit from the planned measures, including digitization policies, while others are proving to be unsustainable.

IMPACT

With these *caveats* in mind, this section offers an **initial and qualitative assessment of the impact of the COVID-19 pandemic on the CCS in partner countries: the Western Balkans, Neighbourhood South, Neighbourhood East, and the Strategic Partners.**

COVID-19's global impact on the cultural and creative sectors¹²

Given the nature of the CCS and the cultural “ecosystem” in which cultural practices and policies are embedded as discussed above, a comprehensive assessment of the impact of COVID-19 on the CCS is difficult both methodologically and theoretically, in addition to being well beyond the scope of this study. That being said, this endeavour starts by defining the general political and economic contexts the phenomenon under observation hinges on.

- I. First, the **COVID-19 pandemic is exacerbating and accelerating pre-existing trends in cultural relations at the national, transnational, and international levels.** This is occurring both

- In positive ways e.g. the shift to digital, pivot to virtual, drive to upskill) and
- In negative ways, troubling ones,

at both the:

- International/transnational level, e.g. challenges to the rules-based international order and liberal institutions, the return to great power rivalry, the geopolitical turn of the new European Commission, rising anti-intellectualism, the negative effects of a neoliberal approach to culture) and
- National level, e.g. democratic backsliding in China, income inequality and connection to race in the USA, cuts in cultural resources, etc.

In other words, COVID-19 is further eroding the capacity of multilateral international institutions to operate in a liberal context. From this point of view, the pandemic does not generate, but rather exacerbates a generalized crisis in the management of international relations, and consequently in the way one conceives of ICR.

- II. Second, the **economic and social consequences of the outbreak of the virus and the measures taken to contain it are of a general nature.** They are not limited to the culture

¹² Considering the complexities and diversity of the cultural sector, it is useful to stress the different levels of quality, precision and reliability of the data on which this report is based. The data comes from numerous sources, differing from each other in their geographical origin, the nature of the organization that produced them, and their period of publication and data collection. Firstly, countries and regions under the scrutiny of this report have been impacted differently and in different periods by the COVID-19 health crisis. They have also reacted differently along the spectrum of confinement and social distancing measures. Secondly, and partially as a consequence of that, governmental and non-governmental actors have started monitoring and tracking the impact and policy responses at different times and in different ways. The survey has been the tool that organizations have relied the most on; as confirmed by UNESCO, several countries have resorted to impact studies to assess the repercussions of COVID-19 and fine-tune their policy responses, the same as several national, regional, sub-regional, and international intergovernmental and non-governmental actors, including civil society groups (UNESCO, 2020). However, the period of data collection differs widely, together with the target and nature of the data being collected. In addition, the pace and manner in which countries are loosening or altering their containment measures is also different—in other words, the context of the analysis is extremely fluid and difficult to capture in a single frame. Trying to harmonize the data and keep any differences in mind during the analysis lead to the overall picture being non-exhaustive alongside gaps in the available data from survey and impact reports.

and creative sectors, but they do have deep implications for the latter, and also for ICR.

According to the World Bank (2020), most countries are expected to face recessions in 2020. The current health crisis could cost \$1 trillion in 2020 (Kuku et al. 2020) and the ILO predicts between 5 and 25 million jobs lost and between \$860 billion and \$3.4 trillion in lost labour income. If one limits the focus to the EU partners under study, the IMF's economic projections year over year estimate a negative economic growth ranging between 4.5% for India to 10.5% for Mexico among the strategic partners. The situation will not be better in the Middle East and Central Asia (-4.7%) or emerging and developing Europe (-5.8%), while being even gloomier in Latin America (-9.4%). The pandemic has also introduced heavy restrictions on international mobility—according to the UNWTO, as early as April all destinations had already introduced restrictions on travel between countries, 45% of which had done so through a total or partial closure of borders, and 30% through total or partial suspension of international connections (WTO, 2020).

III. On top of that, some of these **countries were already experiencing an economic slowdown before COVID-19**. In this regard, observers believe that there is a real risk that **the crisis will exacerbate inequalities globally and within countries** (Culture2030goal, 2020). This is because the virus is severely affecting the poorest quartiles of the population, especially in developing and less developed countries, which generally have limited access to health care (Stiglitz, 2020:17-19). Most of the countries examined in this study are emerging markets or middle-income economies¹³ with previous structural weaknesses, especially those located in the Western Balkans, the Neighbourhood East, and the Neighbourhood South. This general context of a severe economic and social crisis has direct implications for the CCS worldwide, all the more so since, as anticipated, the latter suffer from a vulnerability due to the productive and organizational characteristics of the sector alongside a general lack of attention from policy makers. For this reason, UNESCO announced that *“we are experiencing a cultural emergency”* (UNESCO, 2020n).

Taking into account the systemic characteristics mentioned above and the general political and economic context here discussed, the following pages will describe the **impact of COVID-19 on the CCS in the partner countries** and, as far as possible, sketch the implications for the European Union's ICR with them. To this purpose, this section offers:

1. An overview of the main consequences at the macro level.
2. An attempt to detail the impact in different cultural sectors and regions under observation, i.e. the Neighbourhoods, the Western Balkans, and Strategic Partners.

The thread of this reflection revolves around the need to outline the possible impact of the crisis on the CCS in the short and long term in partner countries and how this is connected with the capacity of the latter to project internationally and contribute to ICR.

Recent survey data shows that **the pandemic has affected the entire chain of creative value – creation, production, distribution and access** – and is significantly weakening the professional, social and economic standing of artists and cultural professionals across the spectrum of partner countries with an asymmetric impact depending on the specific cultural sub-sector (for some

¹³ According to the IMF economy groupings: Algeria, Azerbaijan, Belarus, Brazil, China, Egypt, India, Libya, Mexico, Morocco, Russia, South Africa, and Ukraine

examples, see section on impact by cultural sub-sector).

The adoption of measures to restrict individual mobility and to implement social distancing to limit the spread of the virus has drastically reduced access to culture in all its forms, especially in venue-based sectors (e.g. museums, performing arts, live music, festivals, cinemas) with thousands of cultural events cancelled, postponed, or temporarily suspended, as well as the closure of all major cultural centres.

- # According to UNESCO, in April, 128 countries had completely closed down their cultural venues (UNESCO, 2020a). The consequences for the national cultural sectors have immediately been considerable and, in the fluid context of a pandemic not yet under control, may continue to damage the sector for a long time to come. This risk is made even more concrete by the fact that many countries have traditionally failed to give due attention to their cultural policies and have not allowed the creative and cultural sector to benefit from adequate public support (UNESCO, 2020I).

If the most pressing problem is the fact that besides the **drastic drop in earnings** that could compromise the financial sustainability of many cultural organizations, there are **more critical issues that could arise in the longer term**:

1. Firstly, according to the OECD (2020), there could be a **reduction in both demand and supply** generated by a drop in the purchasing power of users and a decreased propensity towards international tourism.
2. Secondly, it is likely that there will be a **substantial decrease in both public and private funding for the creative and cultural sectors, with a consequent possible contraction in cultural production**. As to public funding, this is justified by the fact that many countries are mobilizing resources of an emergency nature and several of them have poorly developed cultural policies and insufficient structural funds for the long term. For their part, private foundations and non-governmental associations are likely to suffer from a contraction in financial capacity and may not be flexible enough to change the priorities of their initiatives.
3. Thirdly, and partially related to the two previous reasons, the cultural sectors face the challenges presented by the **potential growth of inequalities, both between countries and regions and within a country itself**. On the one hand, the pandemic risks accentuating the disparities between so-called developed countries and emerging and less developed countries. On the other hand, inequalities between regions of the same country or communities could grow, with considerable associated risks, especially for women, minorities and indigenous communities (UNDP, 2020a). The threat to cultural diversity is tangible.

Impact by cultural sub-sector: regional insights

In a general context in which containment measures have led to the closure of most cultural institutions and the cancellation of concerts, theatre performances, festivals and events in all of the countries covered by this study, some differences still emerge among regions and countries due to the local evolution of the pandemic, the characteristics of the cultural sector, the relationship between the latter and public authorities, and the level of internationalization. **Some regions have seen closures and cancellations, which have been accompanied by a lack of responsiveness on the part of public authorities, particularly national ones, partly due to a lack of resources and partly to**

a certain inattention to cultural policies. This is the case in the **Western Balkans** and in the **Eastern Neighbourhood**.

- # As an example, a recent survey in Georgia reveals that four out of ten cultural actors completely lost their income during the pandemic, 70% say they postponed all activities, and almost half say they do not have the skills and tools to transfer their projects online. (Georgia Today, 2020).

In some areas, **the pandemic simply worsened an already challenging context** (e.g. war, economic hardship, repressive measures, administrative and institutional obstacles, and poor cultural policies). In **North Africa and the Middle East**, the COVID-19 crisis has simply magnified long-standing vulnerabilities for cultural actors in the area.

- # For example, the Federation of Cultural and Creative Industries (FICC) of the General Confederation of Moroccan Enterprises (CGEM) estimates the economic impact of this crisis on the sector at 2 billion dirhams (about €185,000,000) (CGEM, 2020).

In others, it was the **nature of the relationship between the creative and cultural sectors and public and private authorities to magnify the difficulties**. This is the case of **Latin America and the Caribbean**, where although the pandemic arrived later, the pre-existing cultural policies were not very resilient and are often based on highly centralized mechanisms, as is the case in Mexico, or patronage, as is the case in Brazil.

The situation in **North America** is not any better, given that the health crisis is putting a strain on the United States and has severely affected the country's creative and cultural sector.

- # Americans for the Arts (2020) reports that by mid-September financial losses in the sector were around \$13 billion, 96% of organizations had been forced to cancel their programming and nine out of ten had to close down due to the virus.

Even in Canada, where the spread of the virus is much lower than in the United States, the consequences for the industry are felt.

- # In Ontario alone, the financial losses of cultural organizations caused by COVID-19 amounted to \$128 million Canadian dollars, representing 16 percent of the industry's total annual revenue. As in many other countries, almost all organizations had to close and cancel most of their planned events.

A special case is **Asia**, the first region to be hit by the pandemic, where the effects on the CCS have varied from country to country and the institutional responses have been both more robust and effective in tackling the challenges. **More developed economies with strong cultural and creative sectors**, such as China, Korea and Japan, have been hardly affected, but **have put in place initiatives to support the sector and seem to display some resilience**. On the contrary, countries with weaker economic structures and less concrete cultural policies, such as India, seem to have more difficulty in properly protecting the cultural sector (see pp. 32).

Given the uneven impact of the pandemic both between the different cultural sectors and different countries involved, this section briefly analyses the impact by cultural sector, focusing on concrete examples coming from the **Neighbourhoods, the Western Balkans, and Strategic Partners**. More detailed profiles will be provided later in this report (pp. 32-46) for a smaller number of countries (Ukraine, Serbia, Morocco, Tunisia, the United States, China, Brazil, and India).

Tourism

A brief reflection on the consequences for tourism is a must, given the interconnection between tourism and the enjoyment of many cultural products.

- # According to UNESCO, for many countries tourism is an important sector, reaching in some cases up to 70% of the national economy, especially in developing states (UNESCO, 2020l). In 2019, 1.5 billion people crossed their national borders for touristic reasons, generating 29% of service-based exports (WTTC 2020). From the first months of 2020, the explosion of the pandemic has led to a collapse in international travel for tourism of 56% between January and May and up to 98% in May compared to the same period in 2019. According to UNWTO, this corresponds to 300 million fewer tourists and \$320 billion in losses for the sector. In addition, the partial reopening of some locations seems to have not cheered the operators of the sector, who consider a recovery before the second half of 2021 unlikely (WTO, 2020).

Cultural tourism, which represents almost 40% of world tourism, could not help but be heavily involved. The impossibility to travel translates into an important decrease of attendance at major cultural sites, in particular museums and archaeological sites of historical interest - including world heritage sites. The recreational and performing arts sectors and, consequently, entire ecosystems of cultural production and distribution, are also paying the consequences. (UNESCO, 2020c)

From this point of view, the situation of the **Southern Neighbourhood** is illustrative. The countries in this area have immediately imposed significant restrictions on international mobility or have suffered from them because these measures were applied in the tourists' countries of origin. The few international museums have been closed and cultural events have been cancelled, which has had a devastating effect on the economies of countries that draw a significant percentage of their gross domestic product from tourism; this is the case of **Tunisia, Morocco, Jordan and Lebanon** (7%) and **Egypt** (12%) (WTO, 2020). According to UNESCO (UNESCO, 2020g), in 2020 the tourism and travel sector in **Arab countries** will lose \$126 billion, putting 4 million jobs at risk.

Performing arts

Performing arts are one of the cultural sectors that have suffered most from the pandemic. Most affected are the level of internationalization and the relationship with the audience (IETM, 2020), as confirmed by the data collected from the survey launched in April by CINARS, according to which the performance events involving the respondents had been either postponed (38%), cancelled (40%) or drastically reduced (22%). Nine out of ten artists had to significantly reduce their international travel in the 2020-21 season, and 60% expect a return to normality no sooner than after 12 months. In **Albania**, the National Theatre shut down and suspended its programs, followed by the National Theatre of Sarajevo in **Bosnia & Herzegovina** and the Macedonian National Theatre in **North Macedonia** (Mima, 2020). In **China**, several festivals have been cancelled—e.g. the Honk Kong Arts Festival or the Macao Arts Festival—or postponed, including the China Shanghai International Arts Festival and the China Performing Arts Expo. (Ministry of Commerce, 2020)

Museums

As mentioned, the collapse of international mobility combined with social distancing measures has had a major impact on the sustainability of museums worldwide. To date, survey data is starting to be available (e.g. the NEMO Survey on the impact of the COVID-19 situation on museums, the majority in Europe) and two reports, by UNESCO and ICOM, provide a fairly detailed picture of the

state of health of museum institutions.

Although there are differences among the funding structures of museum institutions and some museums operate at least partially with public funds, a large majority rely essentially on visitor-generated income and private donations. This means that the freezing of international tourism has led to financial difficulties, exacerbated by lockdown measures.

- # In fact, UNESCO estimated that since the beginning of the pandemic to May, 90% of the museums in the world had been forced to close down. In Egypt, the opening of the Grand Egyptian Museum, whose work has lasted eighteen years, and which prides itself on being the largest museum of Egyptian art in the world, has been postponed due to safety reasons until 2021 (UNESCO, 2020f). In Latin America, the Museo de Arte Latinoamericano in Buenos Aires (MALBA) was among the first to shutter in early March and was followed by many others in the region (Di Liscia, 2020:23). In **Asia**, where many museums have begun to reopen before other regions, a worsening of the outbreak has led to new closures. This is the case in Korea, where a second wave in May has again led to the closure of the country's major museums, including: the National museum of Korea and the National museum of Modern and Contemporary Art (MMCA), now open albeit with limited access, and the National Palace Museum of Korea, still closed due to the virus. (UNESCO, 2020f)

UNESCO and ICOM agree that at least one in ten museums may never reopen again—with this percentage rising to 39% in Arab countries. Although many museums are resuming normal opening hours and admitting visitors with special precautionary measures, the repercussions for employment are obvious, so much so that 6% of term contracts will not be renewed. The situation is particularly serious for freelancers, who, as seen, represent the broadest category in the CCS. According to the data collected by ICOM, more than half of that group have seen their salaries suspended and four out of ten have had to reduce their staff (ICOM, 2020:2)

Naturally, these reflections must be adapted to the referenced context, in particular the fact that museums are not evenly distributed around the world. Of the 95.000 museums mapped, UNESCO estimates that 65% are in North America and Western Europe, 34% in Eastern Europe, Latin America and Asia, and only 0.5% in Arab countries. Taking a closer look at the figures in the Neighbourhoods, Western Balkans, and Strategic Partners, it can be noticed that there are considerable differences depending on the region. **The Southern and Eastern Neighbourhoods** are home to a limited number of museums – ranging from less than 10 in Syria and Libya to less than 200 in Serbia and Armenia – and share a low level of public attention and sensitivity towards museum institutions.¹⁴ On the contrary, the **Strategic Partners** present a number of museums closer to the European average, both in the **Americas** and **Asia**, with numbers ranging from more than a thousand museums in **Mexico** and **South Korea** to more than 5000 in **Japan** and the **United States**. Given that, according to UNESCO, all countries have put in place restrictive measures in the museum sector and that countries with more museums are also those that probably tend to see a greater participation of the population in their activities, it is possible to assume that the strategic partners have suffered more from the consequences of the pandemic in the sector, particularly with regard to the relationship between museums and citizens and the balance of the cultural ecosystem. (UNESCO, 2020m) However, ICOM recalls that the most fragile are the more recently established museums, particularly in **Africa, Asia and the Arab countries** (2020:2).

¹⁴ In-depth interviews with regional experts

The future prospects are not rosier either: 80% of the world's museums expect a substantial reduction in programming (ICOM, 2020:6) and, especially if social distancing measures and reduced mobility continue, it will take a great deal of time before museums return to their pre-pandemic financial strength. Together with the likely contraction in public and private funding, this will lead to lower quality museum programming and a reduction in research and cultural production (OECD, 2020:15).

Books

According to the OECD, the book publishing sector is expected to lose up to 7 billion dollars in 2020, or 7.6% of revenues achieved in 2019. The interconnected nature of the sector means that the repercussions can be seen in the activities of publishers, writers and bookshops (OECD 2020:21). The closure of bookstores and the cancellation of literary festivals and trade fairs have led publishing houses to postpone the release of new publications, which is detrimental to authors and the cultural fabric in which they operate.

- # According to UNESCO, Singapore saw a 65% drop in book sales, which fell by 60% in Argentina. Additionally, many trade fairs have been cancelled (UNESCO, 2020d), with the cancellation of book fairs having particularly damaged the publishing sector in the **Arab countries**, which is characterized by a strong regional dynamism and, in the absence of reliable distribution networks, resorts to trade fairs.

The first to be cancelled was the Bahrain International Book Fair in March, followed in April by the Riyadh International Book Fair and the Abu Dhabi International Book Fair. Even **Palestine**¹⁵ suffered the cancellation of Palfest, the Palestinian festival of literature. This situation is part of a pre-virus crisis, so much so that the Beirut Arab International Book Fair in 2019 had already been cancelled due to political protests in Lebanon (Al-Fanar Media, 2020). The situation is not better on the other side of the ocean. According to the International Publishers Associations, in **Canada** book sales in April alone fell by 65% and online purchases do not seem to have compensated for the losses of bookstores (OECD, 2020:22). Finally, in **China**, three main sectoral events, the Beijing International Book Fair, the Shanghai International Book Fair, and the Hong Kong Book Fair, have been postponed (Ministry of Commerce PRC, 2020).

Music

The music industry, although less dramatically, has also paid a price to the pandemic.

- # The OECD reports that in the United Kingdom, the losses for the sector already amount to 50 million pounds, rising to the exorbitant figure of 10 billion dollars in the **United States**. The impact of this has been partially mitigated by the fact that 50% of the revenue in the industry are from recorded music. However, the other 50% consists of live events, most of which have been cancelled, downsized, or postponed. In addition, the closure of stores has led to a significant contraction in purchases (OECD, 2020:18).

Finally, the cancellation of festivals and trade fairs has further damaged the international nature of production and distribution. Streaming music services may well represent the lion's share, e.g. Spotify, which balanced 6 million new subscriptions in the first quarter of 2020 with the launch of

¹⁵ This designation is without prejudice to positions on the recognition of Palestine as a state

the Spotify COVID-19 music relief, a matching-fund instrument established in cooperation with dozens of sector-specific relief funds in the world. One of the most striking cancellations was certainly that of the Coachella Music Festival, one of the most popular musical events in the world, held every year in the desert of **Southern California** (Di Liscia, 2020:30). Cancellations have also multiplied in other countries, as is the case in **Serbia**, where two of the main music festivals—Exit and Lovefest—have been cancelled (SEEcult, 2020).

Arts

Like many other cultural sectors, the arts sector has been affected by the confinement measures. This concerns both private activities and the major international fairs and exhibitions, many of which have been cancelled or postponed. According to the OECD, the entire sector will need time to recover (2020:20). In **Latin America**, the ArteBA in Buenos Aires and the 34th edition of the SP-Arte at the Biennial Pavilion in Sao Paulo have been postponed (Di Liscia, 2020). In the **USA**, both the New Art Dealers Alliance’s contemporary art fair and the international folk-art market (IFAM), the largest in the world, have been cancelled. In **South East Asia**, the KUL Biennale 2020, Art Moments Jakarta and the Bangkok Art Book Fair have been cancelled. In **China**, together with the National Exhibition of Fine Arts, even Art Basel Hong Kong, one of the leading events in the sector, had first been cancelled before being moved online (Art and Market, 2020).

Film industry

Along with the performing arts, the film industry has been one of the hardest hit. This is because the entire process of film production and distribution has come to a standstill worldwide. The pandemic has hit the sector particularly hard in **Arab countries**, in an already fragile context with little public support. The local film industry, which depends heavily on foreign and particularly European co-productions, has suffered greatly from the closure of borders and social distancing measures (Fahim, 2020). Many countries have put in place social distancing measures that have prevented productions from making films, most cinemas have been closed for a long time, and major international film festivals have been postponed or have taken place in smaller formats.

- # By May, cinemas around the world had already lost 17 billion dollars in revenue, and in the **United States** alone in August a loss of 76% was estimated compared to 2019 (OECD, 2020:21). In a recent letter sent urging the US Congress to act in favour of movie theatres, the Directors Guild of America, the National Association of Theatre Owners and the Motion Picture Association report that due to the pandemic, 93% of cinemas had over 75% in losses in the second quarter of 2020, and if the health emergency continues, 69% of movie theatre companies will close permanently, and 66% of theatre jobs will be lost (Hayes, 2020).

In **Kosovo**,¹⁶ the three main film festivals—Dokufest, International Film Festival in Prishtina, and Anibar International Animation Festival—have jointly decided to postpone their events and go digital with the support of the Kosova Cinematographic Center (KCC) (Balkan Insight, 2020a). In **China**, the Beijing International Film Festival and the Shanghai International Film Festival have been postponed, while the Hong Kong Film Awards has been cancelled (Ministry of Commerce PRC, 2020).

¹⁶ This designation is without prejudice to positions on status and is in line with UNSCR 1244(1999) and the ICJ Opinion on the Kosovo declaration of independence.

The GCLP Alumni survey¹⁷

To further refine our data-based understanding of the impact of COVID-19 on cultural practitioners and cultural organizations, this research also made use of the network created and cultivated by the Cultural Relations Platform in previous years. On the basis of a meta-analysis of the surveys administered by governmental and non-governmental actors to individuals and organizations active in the cultural and creative sector,¹⁸ a survey questionnaire was developed and administered to the participants of previous editions of the **Global Cultural Leadership Programme**.

The survey confirmed the deep impact COVID-19 has had on the sector, with 96% of the respondents answering that COVID-19 had affected their organization significantly (55%) or somewhat (41%). The impact of COVID-19 has also manifested itself in regards to the organizations surveyed in a number of ways—an overwhelming majority referred to either the postponement or cancellation of events and performances. The **consequences for the organizations** of these effects have been both organizational and economic. From the organizational viewpoint, COVID-19 has brought about a reduction in travelling (75% mentioned it), of ongoing programs (36%) and a re-location of personnel working at home (70%), as well as a reduction in external collaboration (25%) and an alteration of staff roles to adapt to the new situation (41%). Only a limited number of organizations surveyed, however, suffered a permanent (2%) or temporary (16%) closure, which confirms the extraordinary resilience displayed by the sector. From an economic viewpoint, most of the GCLP organizations surveyed have been affected in different ways, such as by reduced income and revenues (48%), reduced access to financing (25%), increased drawing from financial reserves (7%) and a lack of opportunities for co-financing projects (16%). However, 18% of the organizations report no financial or economic impact(s). Similarly, 30% of the organizations report no loss of revenues due to COVID-19. Another major source of losses of income was a direct or indirect consequence of the reduction in the demand for cultural products and services.

While respondents had a clear idea of what the **effects of COVID-19 have been on the work of their organization**, much more uncertainty characterizes the respondents' expectations when it comes to the **future of the sector**. Two indications of this ambivalent state of mind are, on the one hand, the responses to a question asking whether *“Looking at the future, how severe do you expect the overall financial impact of the COVID-19 crisis on your organization will be”* which demonstrates that a majority of respondents are either uncertain or unable to answer, suggesting the sector's bewilderment about what the **medium and long-term consequences of COVID-19 on the CCS might be**. On the other hand, when invited to suggest how COVID-19 might impact the activities of their organizations, such as the organization of events, or the postponement or cancellation of performances and contracts, substantial minorities either did not answer or tended to consider these occurrences as very or somewhat unlikely. Similarly, only minorities of those surveyed expect that in the future their organization will need to cancel contracts with external collaborators, permanently reduce staff, reduce opening hours, and/or temporarily or permanently close. On the contrary, most organizations participating in the GCLP survey expect that work will be mainly organized at home and that staff should accommodate tasks to their current needs, and these

¹⁷ The survey was composed of five topic-related sections: past impact covering staff, financial resources and ways of working; future/expected impact; resilience; digitalisation; and policy measures. The survey was conducted between the 4th and 17th of September 2020 and 61 [out of 100] persons responded on behalf of their organizations, coming from 10 partner countries of the European Union as well as from EU Member States.

organizations are unlikely to hire new staff or strengthen new projects. When it comes to the **financial effects** of the pandemic crisis, while a majority believe that this situation will reduce income and revenues, they are less certain that the situation will affect their access to financing and most deem it unlikely that there will be a diminished share of co-financed projects, or the selling of assets or cutting overheads. In general, the majorities are also uncertain or even optimistic on the impact of COVID-19 on the sources of income for their organization. Most respondents also believe the future reduction of artist fees, business, membership, ticket sale, or refunding of fees to be unlikely.

A distinct effect of the pandemic that has also been reported in other studies and surveys, has been a marked **shift toward digitalization**. From this viewpoint, 66% of respondents to the GCLP survey report that their organization has made their products available digitally, and 56% report that their organization has continued to deliver artistic content even during the pandemic. On the other hand, only 56% reported that their organization became more digitalized as a consequence of the pandemic, presumably because many of them already had a high level of digitalization of their activities. To confirm the somehow rosier than expected picture regarding the future entertained by the respondents to the GCLP survey, 70% of the respondents believe that **cultural relations** will be very or somewhat positively affected by the process of digitalization prompted by the COVID-19 pandemic.

However, these organizations seem to have been much less effective in **helping the local communities**. Only one third of those who provided an answer claim their organization donated supplies or services to COVID-19 mitigation efforts, and even less stated that their organizations have provided volunteer work for their community mitigation efforts. However, 94% of the organizations surveyed who answered claim their organization has launched new projects during the pandemic, and most of them with new formats, mostly online.

POLICY RESPONSE

Facing the fateful consequences of the COVID-19 pandemic on the CCS, what kind of responses have been given by the public sector, cultural management organizations, private institutions, non-governmental organizations, and philanthropic associations? This section offers a first **description and assessment of measures undertaken by governments and non-governmental actors in the EU member states and in the partner countries to address the social and economic implications of the pandemic and to provide relief and recovery to the creative and cultural sectors.**

- I. *First*, a quantitative mapping of policy responses is provided, to account for the many types of initiatives that have been put in place in both EU and partner countries.
- II. *Second*, a more detailed and qualitative account of the responses in partner countries is offered.

Mapping policy responses by governments and public bodies in the EU and in partner countries

In line with the priorities of the Cultural Relations Platform, the policy responses adopted at the national level by governments and public bodies in 55 countries, have been mapped and grouped into different clusters (the EU member states, plus the United Kingdom, Western Balkans, the Neighbourhood South, the Neighbourhood East, and the Strategic Partners). Measures and initiatives undertaken by the European Union and some non-governmental and inter-governmental organizations have also been included, although in a less systematic fashion, given the importance the non-governmental sector has in some countries (e.g. the US).

The **available data on policy responses** are unequal and of different reliability. Out of 55 countries for which data was collected, the EU, either with its member states or as the set of the European institutions, accounts for 79% of all policy measures. The **Neighbourhood countries** and the **Strategic Partners** are represented in smaller numbers; respectively, 6% of the policy measures pertain to the Neighbourhoods and 11% to the Strategic Partners. Canada, China, Mexico, Morocco, the Republic of Cyprus and the United States account for 1% to 2% of the cases each. Albania, Algeria, Armenia, Bosnia and Herzegovina, Brazil, Egypt, Georgia, Japan, Jordan, Kosovo,¹⁹ Lebanon, Moldova, Montenegro, the Republic of North Macedonia, Russia, Serbia, South Africa, Tunisia and Ukraine account for less than 1% of the policy responses each. Data on Azerbaijan, Belarus, Israel, Korea, Libya, and Palestine²⁰ is sparse, while nothing is available online on Syria.

Before discussing the main results of the quantitative mapping, two caveats are in order.

- I. *First*, it should be stressed that quantity does not necessarily imply quality. One should not infer that those countries that have realized the largest number of initiatives are also those supplying the most effective response to the COVID-19 crisis. The variety of policy responses is used here as a loose proxy of responsiveness and the potential adaptability of emergency measures.
- II. *Second*, it can be suggested that such an uneven distribution of responses, can be, in part,

¹⁹ This designation is without prejudice to positions on status and is in line with UNSCR 1244(1999) and the ICJ Opinion on the Kosovo declaration of independence.

²⁰ This designation is without prejudice to positions on the recognition of Palestine as a state

accounted for by the limits of the online search, by some geographical areas not being the most suitable source of data, and by language barriers.

- III. *Last*, the abundance of EU-based sources is a consequence of the reliance on EU-based policy trackers in the first stage of the data collection (KEA²¹, European Audio-visual Observatory – EAO²², Compendium of cultural policies and trends²³), which mainly focused on European and EU member states initiatives. This is clearly an indicator of the attention EU member states and institutions pay to this sector, but it does not necessarily imply that others are less attentive or interested²⁴.

Given the special interest in the nature and characteristics of the **policy responses** in the non-EU countries, the data on EU member states and institutions can be seen as a measuring stick with which to compare the responses given by other countries. Keeping these caveats in mind, here the overall results of the mapping of policy responses are discussed, while in the next section, the report hones in on the situation in partner countries²⁵.

The data collection produced 759 valid policy responses in 54 states, plus an assorted set of initiatives by international organizations and EU institutions. Based on this dataset, four main overall considerations are possible:

- **Economic measures** represent the prevailing policy response to the challenges of COVID-19
 - # 82% of all policy measures recorded are economic in nature. This is a clear indicator of what kind of response has been privileged by all countries considered here and of what kind of reaction has been perceived as the most appropriate. Except for Albania, all other countries included here have envisaged at least one kind of economic measure to address the problems posed by COVID-19 to the CCS. Of the remaining policy measures, 11% are related to partial or total closure and reopening and less than 5% address the problems of the cultural sector with other tools (e.g. digitalization measures or consumers' access to cultural content).
- **Direct disbursements of resources** have represented the main avenue along which these economic measures have been implemented
 - # 53% of the economic policy measures have to do with the disbursement of grants (46%), loans (3%) and cash transfers (4%). Only a fifth of the measures are related to indirect support, under the form of exemptions, referrals of obligation and fiscal measures.
- Economic supporting measures have been the preferred form of intervention in **EU member states, the UK, and some Strategic partners**, less so for Neighbourhood countries
 - # While 85% of all EU measures (and 89% of the UK policy measures) are financial in scope and nature, these percentages drop to 67% in the Neighbourhood countries and 74% in the Strategic Partners. In the Neighbourhood areas, no more than half of these measures have

²¹ <https://keanet.eu/research-apps/c19m/>

²² <https://www.obs.coe.int/en/web/observatoire/COVID-19-audiovisual-sector-measures>

²³ <https://www.culturalpolicies.net/COVID-19/comparative-overview-financial/>

²⁴ To address this potential selection bias, a twofold strategy was adopted. On the one hand, a second, more fine-tuned, web search was launched. On the other hand, a set of in-depth qualitative interviews and data collection efforts by a pool of regional experts helped to substantially fill some of these gaps. These interviews offered a clearer understanding of the size and nature of policy responses in the Neighbourhoods, the Western Balkans, and the Strategic Partners.

²⁵ Full description of the methodology and the results on policy responses is provided in Appendices E, F, and G.

been financial in nature. Only in the Neighbourhood South has it represented 100% of all interventions, but with substantial differences in amount spent, an issue to be discussed later.

- The **variety of economic policy responses** has been larger in EU member states than in the Neighbourhoods and Strategic Partners
 - # While EU member states have adopted a combination of direct and indirect measures to support the cultural sector, Neighbourhood countries have mostly adopted direct measures (72% of economic policy measures are grants or loans). Strategic partners have a pattern similar to the one in European countries, but with a wider variation among them.
- Based on the available data, approximately 200 billion euros have been **spent to support the CCS** in the countries under scrutiny.
 - # Collecting information on the actual sums of money spent to support the CCS is not an easy task, part of the problem is a sheer lack of data. In the dataset, there is information about the budget resources allocated to specific policy responses for only 38% of the policy responses. Out of 626 policy measures classified as economic or financial in nature, for less than 50% (N = 292) it was possible to find the actual amount allocated to that policy measure. Moreover, it is difficult sometimes to understand how much of the money allocated under any specific scheme has been actually allocated to the cultural sector. With these shortcomings in mind, based on the available data, overall, the amount spent during the pandemic to support the policies here discussed or as part of the relief and recovery economic assistance, including the CCS, but targeting all economic sectors, is about 210 billion Euros. The range of variation in the sum disbursed, for all responses on which data was available, is wide, ranging from a few thousand Euros to several billion Euros in the case of the largest EU-wide financial supporting scheme, which benefits also (but not only) the CCS in the EU. Based on this data, Table 1 reports the average disbursement per geographic cluster. The data clearly demonstrates that the lion's share of these sums have been allocated to and from European countries and institutions.

Table 1 – Average estimated disbursements (in millions of Euros)²⁶

<i>CLU-Cluster</i>	<i>Mean</i>	<i>Median</i>	<i>SD</i>
<i>EU Member States</i>	213	947	3
<i>Western Balkans</i>	4	6	1.75
<i>Neighbourhood South</i>	8	139	2.82
<i>Neighbourhood East</i>	2	2.7	2.68
<i>Americas</i>	21	54.8	8.7
<i>Africa</i>	2	7.4	7.4

²⁶ CRP Data collection, multiple sources. See Annex G

<i>Asia</i>	17	359	33.9
<i>Eurasia</i>	0		
<i>IGO</i>	0		
<i>Others</i>	14	44	2.25

Note: The amounts here reported do not include the resources spent by EU institutions.

80% of the disbursements over 10 billion Euros are provided by EU member states and European institutions, while the rest comes from China. Instead, 79% of the disbursements in the Neighbourhood countries are less than 5 million Euros in size on average.

- **Audiovisual, films and the performing arts** are the sectors that have received the greatest attention, while visual arts the least.
 - # 56% of all interventions have addressed problems related to the audiovisual and film industries, followed by 48% of the interventions addressing the problems of the performing arts. Only 21% of the interventions have addressed issues related to visual arts.

An overview of the global challenges to culture and responses in partner countries

Taking this overall picture into account, this section analyses the **responses put in place by public authorities, non-governmental and civil society actors in partner countries** – i.e. the Neighbourhoods East and South, the Western Balkans, and the Strategic Partners – to mitigate the impact of the pandemic on the CCS.

In most partner countries, **public authorities developed some form of policy response**. However, the scope and complexity of these measures vary substantially depending on the financial resources available (e.g. in Asia and Korea vs India), the different relationship between public authorities and the cultural sector (e.g. USA vs China), and country-specific political choices in acknowledging and dealing with the health emergency (e.g. Brazil vs Canada). Most countries in the Neighbourhoods and the Strategic Partners opted for financial measures, with a qualitative distribution that roughly confirms the percentages discussed in the previous section (67% in the Neighbourhood countries and 74% in the Strategic Partners). In doing so, these countries have adopted a **combination of direct and indirect measures to support the cultural sector**, with a wide variation among them. Some state actors have matched them with non-financial measures.²⁷

The Neighbourhood East

Information about the response of governments and non-governmental associations to the impact of COVID-19 on the CCS in the Eastern Neighbourhood is not easily accessible. On the one hand, as in

²⁷ While most attention has been devoted to the mapping and collection of governmental responses, in this study the tracking of measures put in place by the private sector, non-governmental and civil society actors, although relevant, is less systematic. Still, a substantial number of measures and initiatives put in place by non-governmental actors and civil society in many of the countries under scrutiny have been recorded.

the case of the Southern Neighbourhood, in some countries the **absence of a strong civil society and a deep-rooted cultural network** has led to a lack of resilience of the sector and a low level of advocacy. On the other hand, governments in the area often do not easily share information. In some cases, e.g. **Belarus**, the government initially did not even recognize the seriousness of the health situation and delayed the implementation of general measures; it follows that nothing has been done in favour of the cultural sector. Some independent cultural actors cooperating with international partners (e.g. the Goethe-Institut, European Cultural Foundation-ECF, and the German Marshall Fund) have joined the protests that are currently taking place against the government and are experiencing the government's repression of free expression and public debate.²⁸

Finally, the countries of the **Eastern Neighbourhood** are considered to be emerging and developing economies and most governments in the area operate in a context of scarce financial resources. If one adds to this the absence of an emergency response from international cultural cooperation (there are some exceptions, such as the House of Europe in Ukraine) and the absence of a private or philanthropic sector able to replace government action, it is easier to understand the **lack of resilience of the sector**. In **Belarus**, the already weak attention of civil society has turned in recent months to issues of a political nature; moreover, the cultural sector is mostly controlled by the government, which traditionally finances the main cultural institutions and apparently continued to do so during the pandemic. In both **Armenia** and **Azerbaijan**, the government has tried to support the cultural sector, while there is no information on private or non-governmental sector initiatives. In **Ukraine**, the government's attempt between March and April to reduce the cultural budget due to the pandemic saw the emergence of a civil society linked to the cultural sector. The government therefore agreed to keep the budget unchanged but did not introduce emergency measures. In **Georgia**, various actors in the creative and cultural sector have launched the "Creative Industries Challenges" platform, which not only acts as a virtual space where cultural operators can get in touch and support each other but has also developed and fielded a survey on the state of health of the sector²⁹.

The Western Balkans

The **Western Balkans** have been characterized by a certain degree of **activism of the cultural sector**, aimed at drawing the attention of governments to the scarcity of resources made available to cope with the consequences of the virus for the creative and cultural sectors. In different ways and at different times, non-governmental organizations, representatives of civil society, and artists in **Serbia, Bosnia and Herzegovina, and Montenegro** have called on their respective governments to develop policies to match the situation and/or have developed their own support measures. This is the case of the Alliance of Dramatic Artists of Vojvodina, the Independent Culture Scene association or the Coordination Board of Representative Art Associations in Serbia. In general, the ministries of culture in the region have not acted before they were pressured by cultural sector organizations. **This lack of responsiveness of public authorities** is linked to the traditional distance between the decision-makers and the cultural and creative sectors in the region, and to the centralization of the decision-making process. This often leads to a one-sided and narrow view of culture and the marginalization of contemporary art practices³⁰. In **Serbia**, the government has at least agreed to guarantee the contracts of artists hired in theatres through subsidies. In March, the Government of

²⁸ Feedback by CRP member

²⁹ Interview with regional expert (Neighborhood East)

³⁰ Interview with regional expert (Western Balkans)

Montenegro approved a package of emergency measures that includes a total allocation of 500,000 Euros for workers in the cultural sector who have seen their activities suspended due to the virus. These funds were disbursed on the basis of co-financing new projects (MINA, 2020). Kosovo³¹ has also allocated funds to alleviate the impact of the virus on professionals and organizations in the cultural sector (Balkan Insight, 2020b).

An opposite case is that of the Republic of **North Macedonia**, where the cultural sector, which is strongly controlled by the ministry of culture, has not received any support in relation to the impact of the virus. This weakness of local civil society, combined with the lack of organization of the independent cultural sector, have prevented effective advocacy. As a result, the emergency in the cultural sector has not entered the public debate and the Ministry of Culture has not taken a position on the issue (Compendium, 2020a). In general, it took several months before the governments in the region recognized the seriousness of the situation. In some cases (e.g. Serbia and Bosnia & Herzegovina) associations and parliamentarians had to fight to prevent the government from cutting the funds that had already been allocated for the cultural sector (FENA, 2020). In the meantime, small and medium-sized cultural associations have put in place economic support measures for their members; **solidarity practices** have multiplied, but are by no means able to make up for the demand. Regarding the relationship with the European Union, the perception of the CCS in the region is that the EU delegations have maintained a low profile during the most serious months of the health crisis and have not put in place any support measures in favour of the local culture/cultural scene. One of the reasons for the inertia shown could be that, once the representations were closed, the lack of specific protocols, skills and digital tools prevented an adequate digital presence. Moreover, no major regional or international non-governmental organization has been fast enough to offer immediate support measures in the short term³².

The Neighbourhood South

Cultural practitioners across the **Neighbourhood South** were already operating in a challenging context at the time the virus erupted. The COVID-19 crisis has simply magnified long-standing vulnerabilities for cultural actors in the area³³. While the current crisis further exposes the precariousness of the sector across the region, calling for strategic thinking and efforts, the governments of the Southern Neighbourhood countries do not seem to have the necessary **economic resources** to cope with the impact of the virus on CCS that are already fragile. On the other hand, civil **society actors** in the Neighbourhood South are increasingly aware of their role and do not hesitate to raise concerns about the actions and policies of their governments. Whenever possible, they organize and launch support measures.

Al-Fanar Media (2020), an independent non-profit news organization focusing on education, research, and culture in the **Arab region**, warns that, while these organizations have multiplied their efforts to set up support programs, they do not have the financial means to adequately respond to the needs of the sector. That being said, on the one hand policy initiatives are growing from **Algeria** to **Jordan** which, although modest, reflects a certain attention on the part of state actors. **Tunisia** stands out in terms of comprehensiveness and sophistication, and has deployed a relief and recovery fund to support artists and cultural practitioners engaged in each and every cultural sector and

³¹ This designation is without prejudice to positions on status and is in line with UNSCR 1244(1999) and the ICJ Opinion on the Kosovo declaration of independence.

³² Ibidem

³³ Interview with regional expert (Neighborhood South)

industry (Fonds Relance Culture). **Jordan** and **Lebanon** do not seem to have prepared any particular emergency or recovery measures for the cultural sector; while the Jordanian government was still considering whether or not to provide funding for artists at the end of the summer, the Egyptian government supported the recovery of the audio-visual sector, one of the most important in the region, and encouraged the digitization of the activities of the Ministry of Culture (UNESCO, 2020) and the cultural offer as part of a campaign for social distancing titled "stay at home, culture is in your hands" (Daily News, 2020). In **Algeria**, the cultural sector is strongly controlled by the government which supports most of the initiatives. The only partially independent sector, publishing, has been hit particularly hard. In general, the Algerian government has not designed any support measures other than a limited economic support program for cultural freelancers who have been deprived of an economic income due to the pandemic, which is provided by the Algerian National Office of Copyright and Related Rights. In June, after months of protests by cultural associations, the Israeli government recognized the need to support the cultural sector and allocated the equivalent of 49.5 million Euros to it. At the same time, in **Palestine**,³⁴ the Arab League Educational, Cultural and Scientific Organization (ALECSO) decided to support the Ministry of Culture with helping artists, so that they can also access the grant programs made available by the Al-Qattan Foundation. In **Libya**, although there is no ministry of culture, the Libyan General Authority for culture has tried to assist Libyan artists by facilitating their digital transition.

Finally, two kinds of regional dynamics are worth notice:

- the rapid response of non-governmental regional funding schemes and
- the increasing regional intergovernmental cooperation on culture in response to the pandemic.

As to the former, two examples stand out,³⁵ i.e. the updated "Stand for art" program of Culture Resource and the "Artist support grant" of the Arab Fund for the Arts and Culture (AFAC). Culture Resource (Al-Mawred Al-Thaqafy) is a regional, non-profit organization founded in 2003 that seeks to support artistic creativity in the Arab region and which encourages cultural exchange within the region and beyond. In May 2020, the organization launched a new component of the pre-existing "stand for art" program. This program supports artists and cultural actors in the **Arab region** who are at risk, either because they are physically threatened and are in danger or are exposed to hardships in their environment. This new component expands the scope of the program to encompass artists, cultural actors and technicians who have suffered from hardship due to the impact of the COVID-19 pandemic. Eligible artists are those who do not receive support from a labour association, work in the informal art sector, depend on irregular incomes, have families to support, are elderly or in fragile health, and/or have been forced to leave their homes. (Al Mawred Al-Thaqafy, 2020)

The Arab Fund for Arts and Culture (AFAC) was founded in 2007 through the initiative of Arab cultural activists as an independent foundation to support individual artists, writers, researchers, intellectuals, as well as organizations from the **Arab region** working in the field of arts and culture. Based in Beirut, AFAC works with artists and organizations all over the Arab region and the rest of the world. To mitigate the effects of COVID-19 on the daily work of Arab artists, in June 2020 the Fund launched the Artist Support Grant, an exceptional funding scheme to support artists whose creative practices and incomes are being adversely impacted by the COVID-19 crisis. The Artist

³⁴ This designation is without prejudice to positions on the recognition of Palestine as a state

³⁵ There are other regional initiatives aimed to support cultural freelancers, including the Research and Practice Platform by Art Jameel, <https://artjameel.org/projects/art-jameel-research-and-practice-platform/>

Support Grant extends support to affected independent artists with a one-time \$3000 grant to support the practice of their art over a period of 3 to 6 months. This grant is open to artists of all practices and the support is meant to foster new ideas for projects under confinement as well as ongoing efforts to strengthen artistic practices through research, reflections, and writings. The support scheme aims to reach independent artists from and residing in the Arab region. The Artist Support Grant program was created with the support of Ford Foundation, the Open Society Foundation and Spotify through the Spotify COVID-19 Music Relief program. Spotify will match any donations, dollar-for-dollar, made by other institutions and individuals to the AFAC's Artist Support Grant program. This program is also an example of cooperation between local, regional and international organizations in the non-governmental and private sectors and also testifies to the spirit of initiative of corporate actors, such as Spotify (AFAC, 2020).

Finally, the pandemic seems to have pushed neighbouring countries to **strengthen regional cooperation** in the cultural field. In May, the Arab League Educational, Cultural and Scientific Organization (ALECSO) organized an extraordinary virtual meeting of the ministers of culture of the Arab countries. In addition to sharing the efforts made towards combatting the virus, the organization launched a series of initiatives in favour of the cultural sector, including a new digital platform. The digitization of cultural production and distribution and the protection of intellectual property have been identified as priorities. This meeting was followed in mid-June by an extraordinary virtual conference of the culture ministers of Islamic World Educational, Scientific and Cultural Organization (ICESCO). Here too, the ministers undertook actions to protect the cultural sector and stressed the potential of the digitization process. (UNESCO, 2020)

The Strategic Partners

Given the different geographical locations and the considerable social, economic and political differences between the countries defined as Strategic Partners, **the responses of governmental, non-governmental actors, and civil society have been the most diverse**. As already seen, in general terms the CCS has been strongly affected by the consequences of the pandemic in all the countries under scrutiny. However, it does not seem possible to identify common trends based on geographical proximity alone, because in both the **Americas** and **Asia** neighbouring countries have reacted very differently, while others, geographically and politically more distant, have **adopted similar measures**.

In the **Americas**, federal authorities in the **United States** and **Mexico** were not particularly concerned with support for the cultural sector. While in the case of the United States this (historical) lack of interest has largely been compensated by the presence of a private and non-governmental sector that is traditionally close to the needs of culture, on the contrary, civil society in Mexico does not seem to be articulate and authoritative enough to provide valid support to artists and organizations.

However, even in the context of a general devolution of responsibility towards culture, the central authorities of the two countries have advanced some timid measures.

- # In March, the U.S. Congress allocated \$75 million – out of a total of \$2.2 trillion under the Coronavirus Aid, Relief and Economic Security (CARES) Act – to the National Endowment for the Arts, which in turn donated funds to various organizations in the cultural sector (NEA, 2020). During the same period, the Ministry of Culture of Mexico allocated 1.3 million Euros to support the livelihoods of artists (UNESCO, 2020k).

In both cases, when compared to the volumes of the respective creative and cultural sectors and the needs of a sector in crisis, the funds distributed are clearly insufficient. At both ends of the **Americas, Brazil and Canada** seem to have paid more attention to the sector. In June, the Brazilian government attempted to set up a program to support the cultural sector during the pandemic period, launched with the so-called "Aldir Blanc" law. This program provides for the transfer of the equivalent of about 450 million Euros to the state and municipal authorities in order to finance local support for the cultural sector. However, the law has already been criticized by activists who believe that the resources that have been allocated will only cover less than 10% of the expected financial losses and will be difficult to provide since, in Brazil, the cultural sector is largely relegated to the informal economy and does not have a strong association network.³⁶ In **Mexico and Brazil**— and contrary to what happens in the **United States**—scarce government resources are not complemented by funds from the private or non-governmental sector, which in both cases are underdeveloped and possess scarce resources. Finally, Canada also launched an emergency support fund for cultural, heritage and sports organizations in April with an initial investment of €320 million. This fund is designed so as to ensure the short-term survival of those freelancers and cultural organizations that have seen their businesses closed down yet do not qualify for regular income support measures (Government of Canada, 2020). The Canada Council for the Arts has also launched an initiative called the “digital originals initiative,” which supports cultural production in a digital format (Canada Council for the Arts, 2020). In general, the cultural cooperation of the North and South American countries with the European Union is not highly developed and does not seem very strategic, especially in Brazil and the United States, where it has been defined as "almost invisible" by an expert in the field. Additionally, the EU delegations do not seem to have put in place initiatives to support local culture or intercultural relations³⁷.

No particular initiatives on the part of the European Union have taken place either in **Russia** or **South Africa**. In the first case, the Russian government has recognized the criticality of the cultural sector, which traditionally enjoys public support, and has included the sector among those that can benefit from emergency economic measures in favour of productive activities³⁸. Special attention has been devoted to **tourism**, while the Ministry of Culture is promoting the digitization of major cultural institutions (UNESCO, 2020). In **South Africa**, where the CCS has been especially hard hit (SACO, 2020), the government has decided since March to support freelancers and cultural organizations in order to minimize the consequences of COVID-19. An initial allocation of about 8 million euros was used by the Ministry of Sport, Arts and Culture to set up a relief fund, which was refinanced in August. The government's action has been accompanied by that of the National Arts Council, which has introduced an instrument of direct economic assistance for artists involved in its programs and has launched a project funding cycle to support the use of Information Technology and digital platforms by cultural actors (National Arts Council, 2020).

The situation among **Asian partners** is even more uneven, given the different political regimes in **China, India, Japan and South Korea**. **South Korea and Japan** have employed strict and effective policies against COVID-19, in line with the tradition of emergency management in the two countries. These policies include important tools to support the cultural sector. In **Japan**, the agency for cultural affairs has been allocated 52 million Euros to support cultural institutions both for physical infrastructure and digital needs (UNESCO, 2020p); furthermore, the Japan Foundation set up

³⁶ Interview with regional expert (Latin America)

³⁷ Ibidem

³⁸ Interview with regional expert

emergency assistance for cultural exchange programs involving a number of grants for online activities and has also launched several digital initiatives (Japan Foundation, 2020). In **South Korea**, the Korean Film Council announced measures to support the film industry amid the pandemic, while the Government has expanded its support in the second half of the year to normalize the artistic ecosystem, including measures to support discount tickets for concert admission and support for emergency living fund loans for performing companies affected by COVID-19 (UNESCO, 2020j). On the contrary, the Indian government seems to be struggling with its overall management of the virus and has not developed a specific policy to assist the creative and cultural sectors. Moreover, the **Indian model** is traditionally far removed from the idea of public support for the sector, and much of the funding has been provided by the private and philanthropic sectors. This is often done in coordination with local authorities; for example, this is the case of cities, which also seem to dialogue with cultural organizations and listen to their requests, although the latter lack organized networks. Finally, due to the nature of the regime and a certain cultural isolationism, balanced only in recent years by the considerable efforts of public diplomacy and ICR, less is known about the real impact of the virus on **China's CCS**. It can be said, however, that the Beijing government is closely monitoring the health of the sector and several regional and local authorities have put in place financial and fiscal support measures for cultural organizations.

On a separate note, it is interesting to point out that also in Asia, the pandemic seems to have reinvigorated **regional cooperation** (as in *Asia to Asia*). If in recent years local cultural organizations have relied on funding from Europe, now, also in part due to the mobility limitations and uncertainty about future planning, these very same organizations are looking for methods to pool their resources and develop relationships within the Neighbourhood, including in the digital sector. This cooperation takes shape in the international cultural cooperative activities, not only of ASEAN but also, for example, of Japanese and Korean cultural institutes³⁹.

Concluding observations

To summarize this variety of policy responses, at all levels, three concluding observations on partner countries are worth stressing.

- I. *First*, it is argued here that, during the crisis, **non-state actors have played an important role in mitigating the risks and alleviating the negative economic and social impacts of COVID-19**. How important this role is varies from country to country and depends on the relationship between non-governmental actors and public authorities, which is reflected in the level of dynamism and capacity of the non-governmental cultural organizations to react and support the cultural sector in facing the COVID-19 crisis and the wider health emergency. By way of example, the dynamism and resilience of non-governmental actors in the United States is filling the void left by a federal government that has traditionally championed a certain *“laissez faire”* attitude in the cultural realm; conversely, private actors have very little room for manoeuvre in China.
- II. *Second*, it is worth noting that in many countries, **civil society has often performed an advocacy role, which has proven crucial in convincing the government to take specific measures regarding the cultural sector**. This is the case, for example, of Ukraine, Serbia, Morocco, or the United States, where non-governmental organizations have immediately collected econometric data on the impact of the virus and launched surveys to explore the

³⁹ Interview with regional expert (Asia)

perceptions of freelancers and cultural organizations, and who are using this data to inform public policy (e.g. Americans for the Arts, Culture Track, or Shugoll Research). In some other cases, the crisis prompted innovative cooperation between state and non-state actors in the shape of public-private relief and a recovery mechanism based on participative approaches (e.g. the Arts for Illinois Relief Fund in the United States or the Fond Relance Culture in Tunisia), and in doing so, have in some cases begun to transform economic models and practices in the sector. Unfortunately, there are countries where civil society is still weak and cultural sector organizations do not have the network or the legitimacy to advocate (e.g. North Macedonia, Brazil, and India).

- III. *Third*, in several partner countries, **regional and local authorities have played a key role in interacting with civil society and preparing emergency measures to support the cultural sector**. This behaviour is presumably positively influenced by the structure of the state, and *this research suggests* that in states with a federal system of government (e.g. the United States, Brazil, and India) local authorities at the state and municipal levels have been more responsive and effective than the central government in supporting the cultural sectors. The opposite is true in states with a centralized system of government (e.g. China and the Republic of North Macedonia). In general terms, the resilience of cities and the efficiency of regional authorities are linked to the devolution of cultural competences, as also confirmed by recent research on the European context⁴⁰.

The data collected during this research suggest that the nature of the political system and the beliefs of the political leadership have an impact on the kinds of responses employed towards COVID-19 for the CCS. To simply delineate possible lines that may guide us towards a more systematic reflection, the report has found evidence that:

- It has been demonstrated that states with a federal system of government, the local authorities at the state and municipal levels have been more responsive and effective than the central government in supporting the cultural sectors. The opposite seems to be true in states with a centralized system of government.
- The beliefs and ideas of political leaders and the public supporting them are important in explaining the comprehensiveness and rigor of the policy responses. The data seems to suggest that leaders, governments and parties that minimize or neglect the seriousness of COVID-19 and/or are more imbued by a neoliberal ideology seems to display less willingness and/or are less capable of taking actions in favour of the cultural sector. *It may be posited that*
 1. *the cultural sector, together with the other sectors, was better supported in countries where political leaders were convinced that COVID-19 was a serious threat and that*
 2. *the countries where neoliberal ideology is most influential reacted worse than countries where this ideology has some competitors.*

For example, India, Brazil, and the United States are three countries that seem to have experienced the most devastating impact on their cultural sectors. All three are federal systems, have been

⁴⁰ For example: KEA European Affairs (2020) The impact of the COVID-19 pandemic on the Cultural and Creative Sector, https://keanet.eu/wp-content/uploads/Impact-of-COVID-19-pandemic-on-CCS_COE-KEA_26062020.pdf.pdf; or Montalto, V., Sacco, P.L., Alberti, V., Panella, F. and Saisana, M., European Cultural and Creative Cities in COVID-19 times, EUR 30249 EN, Publications Office of the European Union, Luxembourg, 2020, ISBN

heavily affected by the virus – both in absolute number of infections and death toll (WHO 2020) – and all three are ruled by governments that, at least initially, denied the severity of the pandemic and neglected measures to contain it.

CASE STUDIES

This section offers a **set of case studies**. Each case study focuses on a **country** and consists of a short overview of the impact of COVID-19 and a description of the policy responses by governmental and non-governmental actors. The case studies cover eight countries: **Ukraine, Serbia, Morocco, Tunisia, the United States, Brazil, China** and **India**. They were chosen according to their representativeness and the richness of available data.

Ukraine

The impact of the health emergency and social containment and distancing measures on the creative and cultural sector has been strong. In July, the Ukrainian Economic Development Agency “PPV Knowledge Networks” supported by the Ministry of Culture and Information Policy disseminated the results of a survey carried out in collaboration with the European Creative Business Network (ECBN) on the health of the CCS.

- # According to the survey, most of the interviewees believe that the CCS in Ukraine has been hit harder than the others. 36% of the operators have had to completely stop their activities due to the limits to mobility and due to social distancing. A quarter of them have already lost the equivalent of 75% of their annual income, while half report losses ranging between 10% and 50% in revenue. Less than one in ten interviewees say they have not suffered economic damage and have been able to continue with their business. Asked about the measures that the government should take to mitigate the impact of the virus, 57% ask the government to launch an expansive economic undertaking to support the demand for cultural products, while half of them believe that greater access to credit and tax benefits are needed. Finally, the request of a quarter of respondents to have access to grants for digitization is accompanied by a similar percentage among those who say they do not currently have the skills and equipment necessary to transfer their assets onto the Internet. (PPV Knowledge Networks, 2020)⁴¹

All in all, the impact of the virus on the creative and cultural sector was undoubtedly relevant. However, what is interesting to note is the intense debate between some elements of civil society and the government regarding the resources to be dedicated to the cultural sector. Beginning in late March 2020, a controversy arose about the fact that the government wanted to reduce the budget dedicated to culture in order to re-allocate funding to other sectors. Several prominent personalities and cultural associations protested against the budget cuts and an advocacy campaign was organized to raise awareness on that risk and call on government to ensure that adequate funding is in place to support the cultural and creative sectors in the country.

Eventually, the government reconsidered its position and on July 13, 2020 President Volodymyr Zelenskyy signed the Law *“On Amendments to Certain Legislative Acts of Ukraine Concerning State Support of Culture, Creative Industries, Tourism, Small and Medium Enterprises Due to the Restrictive Measures Related to the Spread of Coronavirus Disease (COVID-19)”*. On that occasion, President Zelenskyy went on stating that *“Creative industries, cultural institutions are among those who have suffered the most from quarantine. After all, their activities have stopped almost completely, and now they live in complete uncertainty. These are entire areas of the economy that are currently on*

⁴¹ Interview with regional expert

the brink of survival. They also pay taxes and give people jobs, so they need no less support than traditional businesses." (President of Ukraine 2020).

The purpose of this law is to ensure the conditions for maintaining and restoring the viability of culture, the creative industries, and tourism during the COVID-19 pandemic and ensure continuity in the funding of cultural institutions (UNESCO, 2020). Among the main provisions of the law are the expansion of grant programs for creative industries and state subsidies for the development of film projects. The law also introduces some changes in the areas of broadcasting, copyright, collection of fees and user charges. The law defines the concept of a "creative product" in order to establish a legal basis for calculating the contribution of a creative product to the economy, stimulating the export of goods and services of the Ukrainian creative industries abroad, and providing support for the creation by artists and entrepreneurs of an innovative, intersectoral, functional, talented product with high added value and important aesthetic-heuristic, communication, integrative social purpose. **A working group to support culture and the creative industries in connection with the restrictive measures aimed at preventing the emergence and spread of COVID-19 was also established**⁴².

Finally, the Ukrainian Cultural Foundation—a state-owned institution created in 2017 to facilitate development of culture and the arts, and which cooperates with Creative Europe—has launched a grant programme to offer a first aid package to cultural organizations in Ukraine and contribute to the long-term recovery and development of the CCS. The program provides a cash transfer to cover debt obligations incurred by the organizations between March and August 2020, as well as to cover operating expenses until the end of 2020. This program is dedicated to the whole range of cultural sub-sectors (UCF, 2020).

EU cultural cooperation is also playing an important role in offering direct relief to the Ukrainian cultural scene. House of Europe, which is the new EU programme for professional and creative exchange in Ukraine, has developed an emergency package to support the CCS. This case is thoroughly discussed in the focus on ICR later in this report.

Republic of Serbia

Since the beginning of the health crisis in Europe, the Serbian CCS has been severely limited by the social distancing measures and the limitations on individual mobility imposed by the government. Since March, the main cultural institutions have had to suspend their activities and cancel their programs.

- # Among the institutions that have had to close and suspend their activities are theatres (the Serbian national theatre, the Belgrade drama theatre, and the Yugoslav drama theatre cinema and cultural centres (e.g. the national film archive of Serbia), music institutions (such as the Belgrade philharmonic orchestra), and museums (e.g. the Belgrade national museum). (SEEcult, 2020b)

The impact has also been drastic on the **world of music festivals**, so much so that two of the most prominent, Exit and Lovefest, have decided to cancel the 2020 edition. According to the Film Centre of Serbia and the Serbian Film Commission, as early as April, all cinematic activities have been suspended with important economic consequences for producers and distributors, but above all for the freelance professionals in the entertainment industries who live in a precarious situation and

⁴² Interview with regional expert (Neighborhood East)

have no other source of income. The centre predicts that the easing of the containment measures will not improve the situation and it will take time before it returns to the revenue levels of the pre-COVID-19 period (FCS, 2020). All this took place in a context of reduced international mobility that led, from the beginning of the year to July, to a collapse of tourism in Serbia by 87%, resulting in a collapse in entertainment and cultural tourism (SEECult, 2020b).

In March, the situation was made even more difficult by the decision of the national and local authorities to **suspend cultural support programs**, citing as justification the impossibility of a public competition in the context of a health emergency. The Ministry of Culture thus suspended all annual calls for proposals, followed by the Secretariat of Culture of the city of Belgrade, which suspended the only support program for cultural organizations. Finally, the foundation “Novi Sad – European Capital of Culture 2021” suspended all calls for proposals launched under the program (SEECult, 2020a).

The civil society and cultural organizations involved did not take long to make their voices heard by the institutions. Since the beginning of the outbreak, several associations have sent formal requests to local authorities alongside the central government for the cultural sectors to be adequately supported and for urgent measures to be adopted.

- # This is the case, for example, of the Alliance of Dramatic Artists of Vojvodina, the Independent Culture Scene association or the Coordination Board of Representative Art Associations. Intellectuals and artists, festival and events managers, as well as the Confederation of Autonomous Trade Unions, launched petitions and released statements calling for action and suggesting appropriate measures (FCS, 2020).

The Serbian PEN Center formally asked the government to restore the **funding programs** that had previously been frozen (International PEN, 2020). Following these demands, in early April the Ministry of Culture and Information of the Government of the Republic of Serbia announced that it would consider all requests and invited all institutional stakeholders to reflect on ways to support the sector, with particular attention paid to free-lance artists. Eventually, in mid-April, the Ministry forwarded to the Government a proposal with concrete measures aiming to support art and artists. A few weeks later, the Government announced the decision to financially support free-lance artists. During the month of June, local authorities started to allocate funding. However, the Association of Independent Culture Scene of Serbia (NKSS) already warned that, while being commendable, the government’s efforts are still of limited import given that they are far from meeting the expectations of the sector (NKSS 2020).

Cultural actors have not given up and are continuing to display considerable dynamism. The Association of Fine Artists of Serbia (ULUS) and NKSS, supported by Culture Venture, fielded a survey to assess the impact on the culture and creative sector, with the Serbian Film Commission doing the same. Starting from late April, many grass-root initiatives popped up to provide financial support to cultural practitioners to fill the gap left by the government’s lack of resources. Among others, the National Theatre, the Serbian Literary Society, and the Alliance of Dramatic Artists of Vojvodina established dedicated funds. Among the latter, there are the solidarity funds launched by ULUS and the Independent Culture Scene (ICS) association, in June and July, respectively. The ICS Fund, which benefits from the support of other cultural associations, is a response to the current pandemic crisis in which a large number of artists and cultural workers have lost their jobs and livelihoods, and is being implemented as a direct action to compensate for the lack of comprehensive state measures to assist various categories of cultural workers. Along these same lines, the ULUS fund relies on

voluntary donations by fellow artists. However, it seems that these funds do not have the capacity to raise adequate funding⁴³.

Morocco

Since the beginning of March, when the authorities began to impose containment and social distancing measures, cinemas, theatres, art galleries, festivals and cultural centres were forced to suspend their typical activities, and hundreds of events have also been cancelled (L'Economiste, 2020). According to the Ministry of Culture, the film sector, which plays an important role in the economy of the country with an annual value of about 28 million Euros, has been strongly affected by the pandemic. At least 50 productions have been suspended (Al3omk, 2020).

- # At the end of May, the Federation of Cultural and Creative Industries (FICC) estimated that the health emergency affected more than 1100 organizations in the CCS, causing a 70% drop in revenue by about 185 million Euros and putting 100,000 jobs at risk (EcoActu, 2020). Finally, in the same period, transactions in the cultural sector fell by 66%. Faced with this, as stated by the Minister of Culture Othman Al-Firdous, at the end of June the funds available to the National Fund for Cultural Action (Fonds National pour l'Action culturelle, FNAC) were already 95% exhausted (Al3omk, 2020).

Regarding **policy responses**, in the first months of the health crisis, the Government of Morocco deployed a number of **direct and indirect economic policies** to counterbalance the negative effects of COVID-19 on all industries, including the CCS. Direct measures included the creation of an interest-free loan for self-employed entrepreneurs impacted by COVID-19; the introduction of a guarantee mechanism entitled "Damane Oxygene" for small and medium enterprises (SME) designed to mobilize financing resources for those enterprises whose cash flow has deteriorated as a result of the decline in their activity, covering up to 95% of the amount of the credit (Nazaruk, 2020); and a monthly allowance of around €184 from a COVID-19 Pandemic Fund, which is supported by state funding of around 920 million Euros. Indirect measures entailed the suspension of the payment of social security contributions due to the CNSS (National Social Security Institute) and the postponement of tax due dates for companies (Hatim, 2020).

The policies of the government were **not limited to cross-cutting economic interventions**. For example, Morocco has launched a plan to help the cultural sector recover after COVID-19. This move has presumably been at least partially fostered by the mobilization of organized actors. Indeed, during the month of May 2020, several cultural organizations recommended the government act immediately to help ensure that the cultural scene did not succumb to the threats posed by the virus. For example, the Moroccan Confederation of Professional Art and Cultural Organizations called for a public strategy for culture and the arts, while the Moroccan Confederation of Professional Art and Cultural Organizations (CMOACP) launched a petition for the establishment of a public strategy of culture and art aimed at public opinion, intellectuals, artists, politicians, parliamentarians and party policies (Panorapost, 2020). Finally, the president of the Moroccan Union of Theater Professionals publicly denounced the government's inaction in the face of the deteriorating situation of artists since the adoption of a state of health emergency.

In response to that plea for action, on June 15, 2020, the Minister of Culture, Youth and Sport, Othman Al-Firdous, launched the Corona Pandemic Management Fund to support cultural actors

⁴³ Interview with the regional expert (Western Balkans)

and mitigate the **socio-economic impact of the health crisis**. The program includes the pre-distribution by the Moroccan Copyright Office (BMDA) of all the remaining distributions scheduled for 2020. The BMDA will distribute MAD 35.4 million (around 3.25M Euros) in favour of authors and creators, following the recommendations of the UNESCO “ResiliArt Program.”

- # The program is also allocating around 3.59M Euros for cultural projects in five areas; these include theatres (1.84M Euros, 18400 Euros per project); music, song, performing arts, and choreographic arts (1.1M Euros); plastic arts exhibitions (184000 Euros, up to 23000 Euros per project); the acquisition of works of physical or visual art from artists, also in cooperation with the National Museum Foundation (736000 Euros); and, last but not least, a call for projects in publishing and books (11 million DH, 1M Euros) to acquire works to be distributed in public libraries, the publishing of cultural journals, and the participation of Moroccan authors in author residencies and international exhibitions (Kasraoui, 2020).

Tunisia

In Tunisia the creative and cultural sector is one of those to have suffered most during the pandemic. From cultural centres to bookstores, all sectors were affected. According to the Minister of Cultural Affairs Shiraz Laatiri, at least seven hundred cultural activities had been postponed by mid-June, and the subsidies normally allocated to culture – amounting to about 140 million Euros of the state budget – were not enough (AA, 2020). Facing this situation, Tunisian **civil society was quickly mobilized**, also due in part to the fact that cultural organizations were already in the process of carrying out a reflection on the legal and social status of the artists in the country. In fact, there was already a long-standing discussion concerning a bill proposed in 2017 that has aimed to better protect the cultural sector. When COVID-19 took the scene, the culture sector did nothing, but included the vulnerabilities generated by the pandemic among the critical issues already under debate.⁴⁴

The Tunisian government, also by virtue of the fact that the CCS is one of the pillars of the country's economy, has listened to the demands of the cultural world and its response to the sector's critical issues took on the shape of a relief and recovery fund (IFACCA, 2020). The Fonds Relance Culture (FRC) is one of the most sophisticated and comprehensive responses to the impact of the COVID-19 crisis on the cultural sectors in the region. According to Chiraz Laatiri, the Tunisian response *“aims to save the social and economic fabric of culture, then to develop it, by putting an end to the informal economy and the precariousness of actors, while strengthening our position as one of the regional creative platforms. We call for the development of regional and international collaborations to respond effectively and concertedly to this crisis.”* (ATAP, 2020)

Launched in April 2020, the FRC intends to support artists and cultural practitioners engaged in each and every cultural sector and industry. The Fund draws from a private-public endowment which pools the resources coming from the Tunisian government, non-governmental organizations, and individual donors. The European Union has also contributed to the fund via the reallocation of funds coming from the Tfanen - Tunisie Créative project as part of the programme to support the cultural sector in Tunisia (PACT) launched by the European Union in partnership with the Tunisian government.

The aim of the FRC is twofold. The first phase (March-June 2020) consisted of a **rapid response**

⁴⁴ Interview with the regional experts (Neighborhood South)

funding mechanism to ensure the economic survival of cultural practitioners impacted by the suspension and postponement of their activities during the COVID-19 crisis. Following the stabilization phase, the Fund is focusing on the relaunch of the cultural and creative economy with particular attention being paid to the sustainability of this recovery. Indeed, the FRC is intended to evolve according to the health situation affecting the country. According to the Tunisian government, the FRC is called upon to eventually transform from an emergency crisis management fund into a long-term, permanent support fund for cultural revival, modernization and digital transition (Fonds Relance Culture, 2020). Some observers believe that the effectiveness of the fund could be undermined by the fact that many cultural professionals in Tunisia are still a part of the informal economy and do not qualify for grants⁴⁵.

The United States

With more than seven million cases and more than 200,000 deaths, the United States is the **country that has been most affected by COVID-19** (WHO, 2020). Although the government's initial reluctance to declare a state of emergency was followed by containment and distancing measures, the epidemic spiralled out of control with the resulting impact on the economy having been very severe.

- # The OECD projections for 2020 foresee a negative growth of 8 percentage points with the country having lost 163 billion Euros in the first quarter of 2020 (OECD, 2020). Between March and April, 21 million jobs were lost, with the unemployment rate reaching almost 15%. (Florida et al. 2020:5). All sectors of the economy have been hard hit, including the CCS, which, according to the National Endowment for the Arts (NEA), comprise a key component of the **US** economy. Indeed, the CCS contributed 749 billion Euros, or 4.5 percent, to the nation's GDP in 2017 and employed over 5 million wage-and-salary workers who collectively earned 346 billion Euros (NEA 2020).
- # A recent report by Brookings (Florida et al. 2020) on the impact of COVID-19 on the American CCS casts a disturbing shadow over the future of culture in the United States. The report estimates that between April and July 2020 the CCS lost 2.7 million jobs, a third of the workforce in the sector, and more than 128 billion Euros. The performing arts sector was the most affected, losing 50% of jobs and a quarter of the annual revenue.

However, the **effects of the pandemic on the sector are not homogeneous** throughout the country and there are important differences between states and cities. The CCS in the South is that which has been hit hardest while California is the state to have suffered the most, with half a million jobs lost and losses of about 37 billion Euros (2020:10). Furthermore, metropolitan areas have absorbed 80% of the estimated economic losses and 70% of lost jobs, with New York and Los Angeles being the most affected cities (2020:16). This figure is significant if one considers that, in 2017, the creative and cultural sector provided work to over 230,000 people in New York alone, accounting for 5.4% of jobs in the private sector and 13% of the wealth produced in the city (OECD, 2020:9).

⁴⁵ Ibidem

Brookings' econometric estimates are confirmed via the perception data collected by Americans for the Arts (AFA). At the national level, the AFA survey reveals that cultural organizations and professionals have suffered a devastating impact in just a few months.

- # By mid-September, nine out of ten organizations stated they had to close down. 50% of them still do not know when they will reopen and 10% (12,000 organizations) fear they will not survive. One third of the organizations have had to lay off employees or impose unpaid leave (AFA, 2020). For example, according to the American Alliance of Museums (AAM), in the US, museums are losing 28 million Euros a day due to closures and 30% of them may never reopen again. It is estimated that more than 3000 people have already been laid off (UNESCO, 2020d). Additionally, many institutions have already reduced staff and cut salaries (Di Liscia, 2020). The situation is even more serious if one takes into account the impact on artists and freelancers, as the AFA estimates that 95% of them have lost part of their income while eight out of ten professionals have seen a significant contraction in their commissioned work. Among black and indigenous artists, the unemployment rate is nine points higher than that of white artists (60%), as are estimates of lost income in 2020 (AFA, 2020).

The US government has a decentralized approach to the cultural sector—the only federal agency dealing with the sector is the National Endowment for the Arts (NEA), which works at arm's length and is run on a limited budget. This means that, for the most part, it is traditionally the responsibility of **non-governmental and civil society organizations** to support the arts and the cultural sector.⁴⁶ As explained below, this is clearly happening with regard to the COVID-19 crisis. However, the federal government seems to be aware of the difficult situation of the CCS and has tried to support the latter within the limits of its mandate. In late March, the Coronavirus Aid, Relief and Economic Security (CARES) Act was passed by Congress to earmark a \$2.2 trillion economic relief package to protect citizens from the economic and health impacts of COVID-19. This direct economic assistance included \$75 million to be appropriated to the NEA. On top of that, the federal government allocated additional funding for the National Endowment for the Humanities (\$75M), the Institute of Museum and Library Services (\$50M), the Kennedy Center for the Performing Arts in Washington (\$25M), and the Smithsonian Institution (\$7.5M). (NEA, 2020)

- # According to the NEA Chairman, Mary Anne Carter, 40% of the funding allocated to the NEA was awarded directly to individual organizations – grants of \$50,000 each – and to nine state and regional arts agencies – \$250,000 each – to distribute through their funding programs. As a consequence, by early July 2020, 855 organizations throughout the United States received 44.5 million dollars in nonmatching funds to support staff salaries, fees for artists or contractual personnel, and facility costs (NEA, 2020). In general, the NEA was quite fast in allocating funding.

However, while the amount of resources put in place by the federal government alone cannot be compared to the smaller scale of intervention in the Neighbourhoods East and South, the lack of adequate and proportionate funding is the same. For example, the amount of resources appropriated to the NEA through CARES accounts for 0.000003% of the overall relief package. Even further, compared to the first tranche of 44.5 M dollars made available by the NEA to the cultural sector, cultural organizations' requests for direct assistance were three times higher (157 M dollars).

⁴⁶ Interview with the regional expert

(NEA, 2020)

At the same time, and presumably to obviate to the absence of comprehensive federal intervention, several initiatives have been put in place by public authorities at the state or city level to support local cultural actors. In general, **metropolitan cities** (e.g. New York, Los Angeles, Chicago, San Francisco, or Minneapolis) have robust departments of cultural affairs and have responded quickly to the crisis, matching with an important state and local activism and advocacy for the arts⁴⁷. At this level one can find a diverse range of responses.

- # For several examples, the New York State Council on the Arts launched an online platform to inform the cultural community about COVID-19 practices and opportunities (NYSCA, 2020). In California, the Municipality of San Francisco launched an Arts Relief Program consisting of \$2.5m from the city and which is open to donations from private philanthropic organizations. Artists can apply for grants (\$2,000 max), while small and mid-sized organisations can apply for \$5,000 to \$25,000 grants as well as low-interest loans (City of San Francisco, 2020). Finally, the City Commission and the Cultural Arts Council of Miami Beach created a Cultural Arts COVID-19 Emergency Relief Fund with an initial endowment of \$1m (City of Miami Beach, 2020).

Coming to the **response of non-governmental and civil society actors**, what is clear is that, differently from the situation with other strategic partners, in the USA non-state actors active in the arts and other cultural sectors seem particularly resilient and reactive, and are accustomed to a traditional lack of government involvement, knowing how to mitigate risks and address issues on their own. This does not necessarily mean that civil society does not call on the government to demonstrate its commitment or help provide a lifeline for the sector, especially when facing an unprecedented time of need.

However, the number of non-governmental organizations – i.e. **associations, foundations, and trusts** – which have mobilized since early April to provide rapid responses, emergency funds, and technical support for the arts and the cultural sector all over the US is quite impressive. The Grantmakers in the Arts – the national association for both public and private arts and culture funders in the country – counts 35 of them (GiA, 2020). Just to mention a few:

- # The New York Foundation for the Arts launched its “COVID-19 Response Fund” with \$2,000 grants to freelance and contracted cultural workers (NYFA, 2020), while the Sundance Institute activated in April the “COVID-19 Respond and Reimagine Plan” with \$1 Million in emergency relief for independent artists and organizations (Sundance Institute, 2020). The Academy of American Poets, Artadia, Creative Capital, the Foundation for Contemporary Arts, MAP Fund, the National Young Arts Foundation and United States Artists launched in March “Artist Relief,” the first national relief fund for artists affected by the COVID-19 pandemic. With an initial endowment of \$11.6 million coming from donations, the fund is offering unrestricted \$5,000 grants on a rolling basis for six months to professional artists working in any discipline so long as they can demonstrate financial need (Artist Relief, 2020). The J. Paul Getty Trust initiated in April the “LA Arts COVID-19 Relief Fund.” Administered by the California Community Foundation, this \$10 million Fund provides relief and recovery to small and midsize non-profit museums and other visual arts organisations in Los Angeles County that are being affected by the crisis. Relief and recovery grants range from \$25,000

⁴⁷ Ibidem

to \$200,000 (Lapin, 2020). The Helen Frankenthaler Foundation in New York started a relief effort for artists and art organisations buffeted by COVID-19 that will disburse \$5m over the next three years to different relief and recovery funds (HFF, 2020).

There is a certain degree of **dialogue between public authorities and private philanthropy** which translates into a number of **public-private initiatives** to provide relief and recovery to the arts and cultural sectors. This is the case of the Arts for Illinois Relief Fund, launched in early April, which is a collaboration between the city of Chicago, the state of Illinois and private philanthropy including the MacArthur Foundation and the Terra Foundation for American Art to support the cultural community with grants consisting of one-time payments of \$1,500 to artists and artisans and \$6,000 to \$30,000 to cultural organizations. So far, the Fund has awarded over \$5 million to 1,460 artists and 233 organizations around the state (Afl, 2020). Often, it is private foundations and non-governmental associations that provide local authorities with the necessary resources to implement initiatives to support the CCS. In addition, many initiatives involve more than one donor in order to optimize resources.

Finally, the European Union's representations in the country do not seem to have reacted proactively during the emergency and in general the level of cooperation with the cultural organizations is low. An exception is perhaps that of the cultural institutes of the member countries, which in the large metropolitan cities try to establish a dialogue with the local culture, even if it is often a niche offer reserved for the elite⁴⁸.

China

The situation in China is more ambiguous. The Chinese government does not disclose complete data and the available sources are not always reliable, both with regard to the evolution of the pandemic and the impact on the CCS in the country. Moreover, the language barrier and the fact that few sources are available in English make data collection even more difficult. However, some estimates can be made. The **Chinese CCS** has grown from the early 2000s to become an important pillar of the country's economy. According to the British Council, culture in China produces 442 billion Euros of wealth and constitutes 4.2% of the GDP (British Council, 2020), and is linked to tourism, which in 2018, thanks to 63 million foreign visitors, generated 900 billion Euros and contributed to 11% of the national wealth (DW, 2020). In both of these interconnected areas, COVID-19 has caused and will most likely continue to cause considerable damage. Already at the end of February, the University of Beijing estimated direct losses for the cultural sector at 154 billion Euros (Peking University, 2020). In the first months of the year, these figures took the form of closed cultural institutions and cancelled or postponed events (School of Arts Peking University, 2020).

- # The **film industry, performing arts, museum institutions and festivals** seem to be the most affected sectors. China has the largest number of cinemas in the world and its film market is second only to that of the United States. The first three months of the lockdown caused €3.8 billion in losses, with more than 6,000 film-related companies failing and more than 1,000 cinemas never reopening, while the music industry has seen 8000 events cancelled or postponed representing an estimated €1.1 billion in losses in a market worth 55.2 billion. (British Council, 2020). According to the China association of performing arts, more than 20000 events were cancelled from January to March. (China Daily, 2020)

⁴⁸ Interview with regional expert

The museum sector was not spared and almost all museums had to close. Starting in June, some public and private institutions – e.g. M. Woods in Beijing – were able to reopen, while others had to close again due to new outbreaks of the virus, such as the Shanghai Minsheng Art Museum or the X Museum in Beijing (The Art Newspaper, 2020). In general, the museums have returned to operation on the condition that strict distancing and quota restrictions are complied with and that they fall under the control of the provincial departments of culture and tourism.

Finally, COVID-19 has caused considerable damage to the **international festival and fair industry**, which is an important cornerstone of the cultural sector in China. According to data from the Ministry of Commerce, at least 16 festivals and fairs have been cancelled or postponed: in the performing arts sector, the Hong Kong and Macao Arts Festivals have been cancelled, while the China Shanghai International Arts Festival and the China Performing Arts Expo have been postponed. The visual arts have seen the suspension of the National Exhibition of Fine Arts, and the fashion weeks in Shanghai and Hong Kong, while the famous Art Basel in Hong Kong was also cancelled. The **film and publishing sectors** have not been spared either—four international film festivals have been postponed: the Beijing, Shanghai, and Hong Kong International Film Festivals, while the Hong Kong Film Awards have been cancelled. Book fairs in Beijing, Shanghai, and Hong Kong have also been postponed. (Ministry of Commerce PRC, 2020)

The sharp contraction of the CCS has also affected China's **international trade** and, from a certain point of view, its **ICR**. According to Xiang Yong, deputy director of the Institute for Cultural Industries at Peking University, **cultural products are an important part of China's cultural exports**, accounting for 50.6% of total exports in 2018 and growing at a rate of 2%. Performing arts are no less, with growth of 9.9% in 2018 and 5.9% in 2019. However, the crisis in the domestic cultural sector will have a negative impact on exports, and the damage will be amplified by the symmetrical crisis in trading partner countries, given that 59.6% of the total Chinese cultural exports are absorbed by only four markets: the United States, the Netherlands, the United Kingdom, and Japan. According to Yong, part of these losses will be absorbed by the digital market, which is in great expansion in China and will constitute a large part of the foreign trade of a cultural nature. (X. Yong, L. Jisha, 2020)

As is the case in the United States, the first available survey data seems to confirm the **crisis in the Chinese cultural sector**. Indeed, one of the first surveys carried out in the world to probe the perceptions of cultural professionals and cultural organizations was that launched in February by the Liu Haisu Art Museum in cooperation with several partners including Peking University.

- # Six out of ten respondents believed that the isolation measures and social distancing had had a strong impact on the creative and cultural sector, so much so that 56% say they had lost 30% of their typical revenue in the first half of 2020. The situation was so serious that 91% did not believe they could survive for more than six months while seven out of ten respondents only had cash reserves for no more than ninety days. Among the threats to the survival of the Chinese CCS, on a scale from 0 to 5, that of COVID-19 (4.3) had even overcome fears of the trade war between China and the United States (3.0) and socio-political tensions in Hong Kong (2). (Shanghai Observer, 2020)

Facing such a complex picture, how did the Chinese government react? Thinking of the relationship of **public authorities** with their national cultural sector, one can conceive of them as lying along a broad spectrum with, at one pole, the US with its very decentralized approach based on a light arm's length agency (NEA) loosely monitoring and supporting the sector alongside a plethora of non-state organizations active in the field, while at the other pole is China. Based on the available data at this

stage of the research, we can assume that the way in which the Ministry of Culture and Tourism of the People's Republic of China deals with the cultural sector is centralized and as such non-state actors have only a limited degree of freedom. The central government oversees and strategically steers cultural policies with the only actors authorized to act accordingly are public authorities, at various levels. To a certain extent, culture is a matter of the State, which is also true for the **rapid response and emergency mechanisms** put in place to mitigate the negative externalities produced by the COVID-19 crisis.

The Ministry of Culture and Tourism is directly monitoring all measures related to the cultural sectors that have been taken at the regional, provincial, and city levels. Three examples of measures that have been put in place by Chinese authorities to support the cultural sectors can be found in: the city of Beijing, the province of Hunan in the South-Central China region, and the city of Qingdao in the eastern Shandong province.

The Beijing **cultural reform** and development council released a set of measures *“to respond to the impact of the new coronary pneumonia epidemic and promoting the healthy development of cultural enterprises.”* The city allocated around 148 M Euros for a set of measures to support the relief, recovery, and relaunch of local CCS. Great emphasis has been given to the role of **technological innovation and the potential of digitalization** (e.g. the organization of the Beijing International E-sports Innovation and Development Conference) and the areas covered range from content production, domestic film screening subsidies, and support to bookstores, conference and exhibition event planning, to investment and loans, housing rental policies, and measures to facilitate citizens' access to cultural content. Part of the necessary financial resources have been redirected from the “Beijing Propaganda and Cultural Guidance Fund” and the “Culture and Arts Fund.” The policy measures taken in Beijing also include indirect initiatives such as the deferral and postponement of fiscal obligations (e.g. the payment of social security), rent reduction, and loan extension. (Beijing CRDC, 2020)

In late February, the Hunan Provincial Department of Culture and Tourism, together with the Provincial Department of Finance, launched a **relief and recovery program** to support the cultural and tourism industries in the area, i.e. *“Measures for Supporting the Development of the culture and tourism industry against the epidemic.”* Building on a special fund of around 25M Euros, the emergency program provides targeted support to the cultural and tourism sectors that are heavily affected by the epidemic, with the aim of assisting the sector overcome difficulties, maintain viability, and promote development. Supporting policies mainly include subsidies to museums, memorials, art galleries, public libraries, and cultural centres, the purchase of state-owned art academies' performances and productions by local governments, and facilitated bank loans to key cultural and tourism operators. (Hunan PDF, 2020)

Lastly, in early July the Qingdao City council issued the *“Notice on several policies and measures to support the development of culture and tourism in response to the impact of the New Coronary Pneumonia Epidemic.”* This **policy paper** discloses twenty different measures put in place to support the CCS and foster recovery and innovation. Relief initiatives include the deferral of fiscal obligations, rent subsidies, free or subsidized public services, the allocation of grants and the introduction of a government guarantee on loan repayments. The city of Qingdao also acted to stimulate the consumption of cultural goods and services by facilitating citizens' access to culture (e.g. digitalization, discounts, and free access to cultural sites). Great emphasis has also been given to supporting and strengthening the tourism sector. (Qingdao CC, 2020)

The initiatives put in place by the Beijing and Qingdao City Councils and the Hunan province exemplify the Chinese (governmental) approach to supporting the CCS, but they are not the only ones. Other measures have also been announced at the regional level, including a €47.5 million fund made available by the Guangdong Provincial Government to support the CCS, in addition to €6 million in tax relief for the local film industry (UNESCO, 2020c). Concerning the latter, the National Film Administration in cooperation with the Ministry of Finance, the National Development and Reform Commission, and the State Administration of Taxation also introduced fiscal incentives (CFLAC, 2020). Finally, in late January, the Hong Kong Arts Development Council (HKADC) launched the “Support Scheme for Arts & Cultural Sector.” With an initial budget of around 546000 Euros, expanded by an additional 16M Euros due to the worsening of the socio-economic situation. This scheme aims to support arts organisations and cultural practitioners whose activities and work were cancelled or impacted by the pandemic (HKADC, 2020).

Brazil

The creative and cultural sector is an important component of Brazil's economy.

- # NESTA (2020) estimates that culture generates about 25.5 billion Euros per year and employs 5 million people, or about 6% of the national workforce. According to the Brazilian Institute of Geography and Statistics (IBGE), in 2017 the gross value of production (GVP) of the sector reached 31.8 billion Euros, equivalent to 3.8% of the GVP of the entire Brazilian economy (Economistalkart, 2020). This figure is accompanied by a multiplier production of 1.6, lower than the average of the economic sectors (1.8) but higher than that of services (CEDEPLAR, 2020).

In qualitative terms, the **Brazilian CCS** is characterized by a cultural diversity given the size of the country and its multi-ethnic nature. Furthermore, the sector demonstrates a strong dependence on public support, justified by a low level of cultural consumption fuelled by inequalities in income and access to studies among citizens, who often do not have the resources to enjoy cultural products. Finally, the data depicts that the sector operates largely in an **informal economic** context⁴⁹ and is dominated by **small or medium organizations and freelancers**, which according to the National Household Sample Survey (PNAD-C) in 2019, represented 73.2% of the workforce in the world of culture (Economistalkart, 2020). As of March 2020, most freelancers in the field of culture (80.7%) had no formal employment relationship, and only 37% of organizations and 40% of individuals participated in associations, trade unions or other representative bodies in the cultural field (UFRB, 2020).

With the imposition of social distancing measures in mid-March and due to the worsening of the pandemic in the country, Brazil now ranks third after only the USA and India in terms of total number of infections, but second only to the USA in terms of total number of deaths (Statista, 2020). As well, all cultural institutions had to close down and freelancers had to freeze their activities (PEC NESTA, 2020). Data from early research on the impact of the virus unveils serious consequences for the cultural industry. According to a survey fielded between March and July by the Universidade Federal do Recôncavo da Bahia (UFRB), the **crisis is having a deep impact on the CCS**.

- # On average, eight out of ten organizations and individuals claim to have been heavily impacted by the suspension of activities and have indicated greater difficulty in raising funds

⁴⁹ Interview with area expert (Latin America)

with private and public entities. In April alone, 78% of respondents had cancelled between 50% and 100% of their activities. Six out of ten organizations also had to make some kind of contract/payroll reduction while half of them had to lay off employees outright. This crisis aggravates a scenario of unpredictability in the sector: half of cultural freelancers have no way of estimating the amount of cancellations they would have for the second half of 2020 and 65% of the organizations can't make this estimate for 2021 either. The sectors most affected financially were primarily the performing arts and audio-visual sectors, with the music sector appearing the most affected by the crisis (UFRB, 2020). For example, in March, a sample of music companies and Individual Micro Entrepreneurs interviewed by SIM Sao Paulo reported more than eight thousand cancelled events and 72.5 million Euros in losses (DATA SIM, 2020).

The Brazilian government responded to the pandemic by launching **direct and indirect economic measures** in favour of small and medium-sized businesses and the liberal professions, including the cultural sector. 150 billion Euros, 4.6% of the public budget, were reallocated to emergency fiscal and monetary measures, for example a voucher scheme that guaranteed income support until August (PEC NESTA, 2020). More **specific policy responses** have concerned the world of culture. The instrument chiefly used for the government's response was the law for the cultural emergency, also known as the "Aldir Blanc Law," approved by the Brazilian Congress in the beginning of July (Secretaria Especial da Cultura, 2020). This law allocates 450.5 million Euros to direct and indirect economic measures for workers in the CCS. In more detail, this includes the payment of three-monthly instalments of an emergency income of around 90 Euros to workers in the sector who have had to suspend their activities, alongside subsidies for the maintenance of physical premises and new calls for projects. Tax exemptions are also available. The funds are directly transferred to states and municipalities, which have two months to detail plans for the allocation of funds. Although it is a step in the right direction, the law is already subject to criticism.

1. *First*, it is estimated that the funds are already insufficient and cover no more than 10% of the losses suffered by the sector.
2. *Second*, in Brazil, states and municipalities do not have reliable data about the status of workers in the CCS.

The fact that municipal elections are being held this year, together with the fact that many workers do not meet the criteria to access subsidies alongside the absence of a fund management control body, makes it likely that some of the funds will be misused.⁵⁰ As such, some states are trying to overcome the criticality of the program, as is the case of the state of Mato Grosso, which has launched a census and a registration campaign of cultural workers. (SECEL, 2020)

Interventions at the federal level seem to be complemented by some initiatives at the state level. The local government of the Sao Paulo State has recently implemented a support scheme consisting of relief funds and subsidies to compensate for operational losses and support new projects. In addition to the 45 million Euros allocated to the fund, the government supports a credit line at preferential conditions dedicated to cultural organizations (UNESCO, 2020o).

- # The Secretary for Culture and Creative Economy of Brasilia has launched a funding scheme of about 100000 Euros for the city CCS. The program offers credit lines for micro-enterprises and freelancers and loans for small and medium businesses. At the same time the Secretary

⁵⁰ Interview with the regional expert (Latin America)

of Culture and Creative Economy in the State of Rio de Janeiro has implemented "Cultura Presente nas Redes," a program worth about 55,000,000 Euros to subsidize new projects of digital production and distribution. (SECEC RJ, 2020)

Even **non-governmental organizations** operating in the cultural sector, although few and poorly organized, seem to display some signs of closeness to local communities and resilience. NESTA reports that since the beginning of the pandemic, the so-called "lives solidarias" have multiplied, raising funds through online cultural events. 120 of these have already collected 2.6 million Euros in donations (PEC NESTA, 2020). Finally, the survey by UFRB shows that despite the freezing of activities, the creative sector is resilient, so much so that both freelancers (45.1%) and organizations (42%) are developing new projects and products during the period of social isolation. Many of them are digital in nature, although a good share of cultural practitioners lack digital skills, equipment, and reliable internet infrastructure (UFRB, 2020).

India

Measuring India's creative economy, the EYSA Centre estimates that the share of the creative economy in 2016-17 was 2.97% of total manufacturing Gross Value Added (GVA) (ESYA Centre, 2020). Taking into consideration the necessary adjustment for taxes and subsidies, this translates into a share that is lower than the mean for shares to GDP across Asia. However, in 2018, **India's cultural and creative** (formal) sector generated approximately €3.2 billion in wealth and grew by 2.5% over the previous year. In addition, the budget dedicated by the government to the cultural sector has increased from 268 million Euros in 2016-17 to an estimated 308 million Euros in 2019-2020. While the Indian cultural sector is therefore growing and the resources dedicated to culture were slightly increasing before the pandemic, the British Council notes that cultural workers in India are a vulnerable category.

1. *First*, workers in the cultural sector, who are mostly freelancers or small organizations, do not enjoy organized associational structures, be they formal (trade unions) or informal (professional associations). This prevents them from effectively interacting with the authorities, especially at the federal level.
2. *Secondly*, the CCS does not enjoy a structured policy on the part of the government, and most workers in the sector do not qualify for social security. The lack of support networks is exacerbated by the fact that part of the sector falls under the informal economy. (British Council, 2020a)

The pandemic and its economic consequences have only exacerbated such vulnerabilities. According to the year over year projections of the International Monetary Fund released last June, the Indian economy is likely to witness a negative growth of 4.5% in 2020 (IMF, 2020a). The ILO reports that containment and distancing measures could plunge 400 million Indians below the poverty line (Prevention Web, 2020), a portion of which are likely to be artists and creatives. Looking at the **impact of COVID-19 on the CCS**, the Indian case study does not differ from what took place in other partner countries—the contraction of the economy and the imposition of social containment and distancing measures are having devastating effects on the sector. The first available data in this regard comes from the preliminary results of a survey conducted by the British Council, in partnership with FICCI and the Art X Company, to evaluate the impact of COVID-19 on cultural workers in India. The first pieces of data confirm the nature of the Indian cultural sector.

In fact, nine out of ten interviewees are freelancers or represent micro, small, and at most

medium-sized enterprises (MSMEs), many of which have suffered significant financial losses and have seen a sharp contraction in their activities. Specifically, 74% of the revenues have been frozen due to the measures imposed by the government, and this in relation to the fact that seven out of ten organizations have had to cancel planned events. 32% of freelancers and MSMEs claim to have lost at least 50% of their annual revenue in the first quarter since the pandemic began, and four out of ten expect a further reduction in their activity. (British Council, 2020a)

Although some voices have been raised in favour of the sector,⁵¹ poor organization and legitimacy of cultural actors at the federal level has meant that the government has so far been put under only limited pressure to act more effectively in terms of emergency support. Moreover, traditionally the **federal government** is not involved in the elaboration of articulated cultural policies, except when it comes to intangible heritage, and the main initiatives in support of the contemporary culture sector remain the prerogative of local authorities, the private (corporate) sector, and the philanthropic (international) sector.⁵² Consequently, the federal government has not so far provided for exceptional measures of emergency support. The only initiative explicitly aimed at promoting access to culture and limiting the damage inflicted by the strong reduction of international mobility, and therefore of (cultural) tourism, has been to encourage the digitization process of the Ministry of Culture. This includes a number of initiatives to support museum institutions migrating to the digital space and a national mapping of the cultural offer in the fields of performing and musical arts and festivals (Hindustan Times, 2020). It may be the case that State authorities are more responsive and resilient. For example, the British Council points out that in July, the Kerala State Government, in response to an appeal launched by a collective of Indian artists (New Indian Express, 2020), decided to allocate funds for emergency measures to support the local cultural sector (DCA Kerala, 2020).

More interesting is the response of the **non-governmental sector**. As already pointed out, support for culture in India traditionally originates from the private and philanthropic sector. At the same time, however, the isolationist attitude of the current government concurs with the recent crisis of the model of cooperation in international relations and the reconversion of the agendas of many non-governmental organizations, which no longer focus on global but rather regional and domestic dynamics, to make it more difficult for international funds to reach Indian cultural practitioners. This means that examples of support to the sector come from Indian organizations⁵³.

- # For example, the "Assistance for Disaster Affected Artists" (ADAA) association was created to launch a fundraising campaign in favour of artists affected by the pandemic, which since May has been subsidizing one hundred artist families with a small monthly salary (the equivalent of 58 Euros) (ADAA, 2020). Another example of solidarity and mutual aid is that of the "Stayin Alive" collective. Born from the initiative of a group of Indian cultural organizations during the first months of the pandemic, StayIN aLIVE is a platform that aims to make the cultural sector as self-sufficient as possible. One of the initiatives in this sense is the creation of an Artist emergency fund (SSAEF). SSAEF provides direct cash grants to artists

⁵¹ To read more about Indian creatives and artists' appeals for relief and recovery measures: <https://www.news18.com/news/buzz/insta-auctions-digital-savvy-artisans-how-COVID-19-has-completely-changed-indias-art-landscape-2646417.html>
<https://www.theweek.in/news/entertainment/2020/04/11/COVID-19-but-what-about-art-the-culturati-appeals-for-government-relief.html>

⁵² Interview with regional expert (Asia)

⁵³ Ibidem

who have lost their employment and income due to the COVID-19 containment measures (SA, 2020).

Finally, in May the Paris-based organization “Believe Entertainment” and the Indian Anahad Foundation launched “Lets Folk Together,” which is a support scheme to compensate operational losses and support the new production of 5000 folk artists and their families in India. This initiative is based on a relief fundraiser which offered online live concerts in exchange for donations. (UNESCO, 2020q)

THE DIGITALIZATION PROCESS

As demonstrated throughout this report, the **issue of digitalization plays a central role in understanding the evolution of the CCS in all partner countries** in times (but not only) of reduced mobility and social distancing. There is substantial evidence indicating that the COVID-19 crisis spurred a **digital shift** already taking place in the EU and in partner countries. While the pace of this process varies considerably depending on the geographical area under scrutiny, new opportunities for digital cultural production and distribution alongside a shift towards increased collaboration to address digital inclusivity and skills development are on the rise. In general, the **process of digitization of the cultural sector is seen as a positive development**. The OECD argues that emerging technologies and the new forms of digitally mediated, decentralized creative production can potentially lead to a positive transformation of cultural production and the consumption of cultural products in an increasingly global context (OECD, 2020). In fact, many of the surveys analysed in this research depict that cultural operators share, on average, a positive view of the digital transformation process (e.g. in the USA or Ukraine, as well as among GCLP Alumni).

On the one hand, several examples of cultural practices during the pandemic seems to suggest that digital technology has limited the damage inflicted by the imposition of social distancing measures, thereby helping to develop new forms of cultural experience, production, and distribution. For example, according to the Festival City Network, at least 27 festivals have taken action to develop new digital models for online communication and sharing (OECD, 2020:18). In India, the Jaipur Literature Festival, which is the largest independent literary event in Asia, has adapted to the digital space by launching "Brave New World," a program of online meetings with Indian and European writers and journalists. The initiative, which is in collaboration with the Cultural Relations Platform and the delegation of the European Union to India, is supported by the European Union and aims to strengthen cultural relations between the European Union and India (CRP, 2020). Many art galleries, even in emerging countries, are trying to move their sales sessions online, investing in digital formats that attract potential buyers (OECD, 2020:20). Museums are among the cultural institutions that have best responded to the challenge posed by the digital transition in order to maintain contact with the public, so much so that a recent UNESCO report has identified more than 800 measures implemented in response to COVID-19, most of which were based on digital investments made in previous years. The latter include the use of already available digital resources: e.g. virtual tours of museum collections; the online migration of events that should have been held in-person; and generally, an increased social media presence (e.g. Facebook, Twitter, etc.)⁵⁴. (UNESCO, 2020m:15)

On the other hand, **governmental and non-governmental actors** have included digital tools as part of their arsenal of relief and recovery measures in response to the COVID-19 crisis. This is the case, for example, of the Albanian Ministry of Culture, which already in April tasked all the relevant agencies and departments with developing cultural programs that could be offered through digital platforms, or its Indian counterpart, which is designing tools to encourage citizens to use digital technologies to access cultural content. Other countries have also launched initiatives to raise awareness about the possibility of enjoying culture from a distance and in a domestic environment. This is the case of the "Living the culture of #ostanidoma (stay at home)" campaign promoted by the Government of Montenegro (Portal Analitika, 2020), or the "stay at home" campaign launched by

⁵⁴ This is the case of Serbia. To learn more: Dragičević Šešić & Stefanović 2020 *The ethics and aesthetics of museum practices in Serbia during the pandemic and the digital turn*, IPSI journal

the Egyptian Ministry of Culture (Zawya, 2020).

While it would seem obvious to recommend strengthening support measures in favour of the digital transformation of the cultural ecosystem, it must be reminded “all that glitters is not gold” and as such it is worth also sounding a note of caution.

As shared by the Ministers of Culture of the UNESCO member countries, the **digital transformation process risks exacerbating social inequalities** already present in different areas of the world, both through a flattening of cultural diversity and a standardization of cultural production and distribution processes, and through obstacles to access to digital technologies by cultural consumers, due to poor skills or infrastructural deficits. (UNESCO, 2020I)

- # According to the World Bank, only half of the world’s population uses the internet. Focusing on partner countries, only North America displays a high percentage (88%, 2018), while the MENA region, Latin America, and East Asia stick to the average with 65% (2018), 66% (2018), and 55% (2017) respectively (The World Bank, 2020). In addition, digital access presents significant disparities within countries themselves, with a gap that exists between major cities and rural areas, or between richer and poorer or more peripheral regions (OECD, 2020:24).

In **India**, the digital shift risks excluding rural communities from access to culture and, among those who have access to the internet, marginalizing even more women, who on average are less digitally literate—the OECD estimates that globally, 327 million less women than men have a digital device and access to the internet (Indian Cultural Forum 2020)

This reflects negatively not only on the **capacity of the audience to access culture online**, but also on the **capacity of cultural actors to shift to digital**. There is evidence that many of them, especially in less technologically developed partner countries (e.g. in the Southern Neighbourhood, India, or Brazil) and geographically marginalized areas where infrastructure remains insufficient to support the digitization of culture, do not have the skills and expertise to effectively migrate to the online environment. The reason for this vulnerability is inherent in the structural weaknesses of small cultural institutions, which generally lack digitally trained staff, and of self-employed workers, who are subject to a general scarcity of resources (ICOM, 2020:9). The difficulty of part of the CCS in partner countries to undertake or accelerate the **digital transition** is confirmed by the data from the first impact surveys. In Brazil, 65% of cultural operators, while favouring the use of digital technologies, say they do not have adequate infrastructure and cannot afford the high costs of a reliable internet connection (ICCS, 2020). A similar context can be found in **South Africa** (SACO, 2020). In a recent report, ICOM notes that there are important differences in the resources that museums have at their disposal to face the digital challenge and stay in touch with their users, especially in the production of quality digital content. This is the case, for example, for many museums in **Arab countries** (ICOM, 2020:13).

Finally, there is an ongoing **debate within cultural communities** on whether culture should embrace the digital transformation, with some claiming that for several cultural sectors this could be detrimental both in terms of capacity to engage their audiences, the “physical” nature of cultural expression, and cultural diversity. This is not negligible because cultural diversity is an integral part of the values of the European Union. Furthermore, there are cultural practices that are badly adapted to the digital environment, e.g. the performing arts (Indian Cultural Forum, 2020). In this regard, some scholars question the risk that digitization may compromise the authenticity of cultural

experience (Towse, 2019). Moreover, it is worth remembering that since the beginning of the pandemic countless individual artists and cultural organizations offered their content online free of charge and that, in the short term, it is difficult to imagine that digital platforms can replace the revenue from in-person events (British Council, 2020a). In other words, some cultural actors not only lack the capacity to digitize their work, but they also do not want to.⁵⁵

⁵⁵ Interview with regional expert

INTERNATIONAL CULTURAL RELATIONS

Response and resilience: Support to ICR during the COVID-19 pandemic

In a situation like the one described in this report, one which jeopardizes the viability of many of the actors active in the cultural field to carry out their international operations, it is important to grasp what **state and non-state actors are doing to mitigate this risk**, or, in case such a capacity has already been damaged, what initiatives have been taken to offer relief and recovery.

It has been seen that the majority of **policy responses**, both from the public sector and from organized cultural, private, or philanthropic actors, have favoured the support of the different cultural sectors at the national level. Measures explicitly aimed at strengthening or restoring international cultural relations do not seem to be significant at this stage. When these measures were implemented, they took the shape of economic and technical assistance to the cultural sector in other countries or support to ICR between their own country and third partners. By way of example – neither comprehensive nor exhaustive – below a limited number of initiatives undertaken in different regions and by different actors are presented:⁵⁶

- The German Federal Foreign Office and the Goethe-Institut – The International 2020 Relief Fund for Organisations in Culture and Education⁵⁷
 - This fund is intended to ensure the continuity of international cultural cooperation by supporting organisations in partner countries. More specifically, the initiative is dedicated to cultural institutions based in countries outside the European Union that are suffering from the consequences of the COVID-19 pandemic and have no access to other sources of funding. Support is not limited to the short-term and direct economic assistance – of up to 25.000 Euros per project – for technical back up is also offered, for example in terms of infrastructural maintenance, redevelopment projects, the development of new, digital formats or digital training and qualification. Although being an initiative of the Goethe-Institut and the Federal Foreign Office, the relief fund is backed by a consortium including cultural organisations and private foundations from Germany, i.e., the Berliner Künstlerprogramm of the DAAD, the German UNESCO Commission, the S. Fischer Foundation, the Mercator Foundation, the Robert Bosch Foundation and the Siemens Foundation. The Foreign Office provided an initial endowment of three million Euros while the other members of the consortium provide the additional funds.
- The French institute in Morocco – COVID-19 Exceptional Call for Projects to Support the Moroccan Art and Cultural Scene⁵⁸
 - In May 2020, the Cooperation and Cultural Action Service of the French Embassy,

⁵⁶ The cases described below mostly refer to the initiatives of some EU Member States. This is due to the fact that the mapping study focused primarily on policy responses from state and inter-governmental actors. However, initiatives in favor of international cultural relations are by no means the prerogative of public authorities. Non-state organizations are also developing initiatives to support the international relations of cultural actors both in the EU and in partner countries.

⁵⁷ <https://www.goethe.de/en/uun/auf/hlf.html>

⁵⁸ <https://if-maroc.org/cooperation-1/culture/aide-aux-projets-culturels/COVID-19-appel-a-projets-exceptionnel-pour-soutenir-la-scene-artistique-et-culturelle-marocaine/>

together with the French Institute, launched an initiative to support the Moroccan art and cultural scene. The call offers direct economic assistance from the French Embassy and technical support from the branches of the French Institut in Morocco to cultural associations and self-employed artists carrying out projects in urban areas. The objective of this initiative is to promote and foster the development of educational and cultural offers to social groups who traditionally lack or have limited access to culture, with particular regard to gender diversity and social cohesion.

- House of Europe in Ukraine – Curing culture of the pandemic⁵⁹
 - House of Europe is the new EU programme for professional and creative exchange in Ukraine. The project has developed an emergency package to support the culture and creative sectors affected by the COVID-19 pandemic in Ukraine. This package consists of a portfolio of four different programmes representing a total disbursement of 800.000 Euros:
 - Hackathon “Hack the Culture” – the result of collaboration with the Goethe-Institut Ukraine and with the support of the Embassy of the Federal Republic of Germany, the project launched an online *ideathon* which involved 1,168 professionals from the arts, creative industries, and IT brainstorming for 48 hours on anti-crisis solutions for culture. Participants, with the help of experts from Ukraine and the EU, proposed more than sixty projects. Three teams were awarded with 3000 Euros each, while eight shortlisted projects were assigned grants of up to 25,000 Euros each.
 - Infrastructure grants - This grant is for theatres, galleries, creative hubs, and other cultural institutions in need of funding for technical equipment and rent.
 - Digital cooperation grants - This grant is awarded ten organizations based on their effectiveness and innovation in reacting to the restriction measures with new digital formats (e.g. the live streaming of festivals, art exhibitions over social media, and cloud working).
 - Stipends for professionals in the culture and creative industries - This initiative provided emergency relief to individual cultural practitioners facing losses in income due to the pandemic. More than two thousand cultural managers from all over Ukraine received a small grant for the completion of an online course, 1,500 of which also receive a stipend, amounting to a total of around €137.200.
- The Ministry of Culture and Information of Serbia – E-mobility of artists⁶⁰
 - In response to the COVID-19 outbreak and in order to counterbalance the negative effects on traditional international cultural exchange, in July the Department for International Relations and European Integration at the Ministry of Culture and Information opened a call for the virtual mobility of artists in 2020. This call is co-financing the virtual mobility of artists and professionals in the cultural and creative sectors, including the costs associated with the production of artistic content in order to promote new forms of international cooperation under the guise of online mobility in culture and the arts. This includes exchanges and networking possible through the virtual mobility of artistic content and the mobility of artists and professionals from the

⁵⁹ <https://houseofeuropa.org.ua/en/grant/COVID-19-response>

⁶⁰ <https://www.kultura.gov.rs/mapa-sajta>

Republic of Serbia; events and manifestations (international gatherings, festivals, seminars, workshops, conferences, etc.), and cultural residencies in all cultural sectors. The ultimate goal is to offer systematic support for the promotion of international cultural cooperation and the promotion of the culture and art of the Republic of Serbia abroad.

On balance, the **digital transition** seems to offer interesting opportunities for those institutional actors responsible for protecting the creative and cultural sector and promoting the community's access to culture. However, the picture is less clear when it comes to the **benefits digitization** might bring to the **processes of production and distribution of culture**. On a separate note, if the digitization process represents a potential risk for the viability of some cultural sectors in partner countries, the situation is different if one considers the impact of the digital transformation process on international cultural relations understood as dialogue between cultures and their representatives. In this case, digital tools, especially in a context of reduced international mobility and of increased environmental sensitivity in general, seem to represent a valid, although temporary, alternative to physical relations.

There are also examples of new and upcoming projects focusing on digital content, such as

- The French American Museum Exchange launched a new emergency grant initiative to support museums in the USA, Canada and France with the development of online content (Hyperallergic, 2020).
- The Goethe-Institut created Kulturama, a digital platform that allows artists and cultural organizations to livestream their events, thereby reaching an international audience (Kulturama 2020).
- DutchCulture and Pakhuis de Zwijger have organized "Infected Cities," a series of live-casts focusing on the impact of the pandemic in nine cities across the world (New York, Jakarta, Cairo, Moscow, Sao Paulo, Shanghai, Johannesburg, Istanbul, and Tokyo) (Dutch Culture 2020).
- The EUNIC cluster in Senegal launched the Lëlu Di Wajal'Art initiative to support local cultural actors cultivate and practice digital content creation and distribution (EUNIC, 2020c).

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Relations***

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