

**The REED Typology:
Understanding Market-Orientation and Instrumental Values
in Cultural Policy across Europe**

by

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Abstract

This article develops a typology of cultural policy in 30 European nation-states, based on the centrality of 'neoliberal' market-based rationalities in subsidised cultural fields. This *Resistant, Emergent, Established, and Dominant* (REED) typology is based on two measures of marketisation, market-orientation and instrumental values, which are found in European 'cultural policy assemblages' (networked systems of cultural policies, cultural policymaking bodies, cultural organisations, and cultural intermediaries). We show that all cultural policy assemblages in European nation-states are marketised to some degree, suggesting that Europe is 'post-marketised'. Further, we find a heterogeneous range of marketised practices, showing different instantiations of marketisation across nation-states. REED offers a new prism to conceptualise Europe's subsidised cultural fields. Grounded in actual policy orientations, it overcomes limitations of earlier typologies and, crucially, it provides both a descriptive modelling of the contemporary European cultural field and an analytical methodology for comparing nation-states relative to marketisation.

Keywords: Neoliberalism; Market-orientation; Cultural policy; Policy Justification; Cultural values; Europe; REED typology

Introduction

Scholars and policymakers have debated the justifications for state expenditure in the cultural field since the formalisation of state supported cultural endeavours in the 19th century (Belfiore & Bennett, 2008). Contemporary cultural policymakers often demand instrumental outcomes, such as contributions to the society, the economy, or the polity, to justify the public expenditure within the cultural field (O'Brien, 2010; CASE, 2010; European Commission, 2018a; 2018b; Arts Council England, 2020). Scholars often link such a focus on 'instrumental' values to an increasing presence of 'neoliberal' or marketised ideology in public policy (Hesmondhalgh et al, 2015; McGuigan, 2016; Alexander, 2018a; 2019). This paper investigates, in a European context, two measures of such marketisation: the relative presence of market-orientation in stated cultural-policy objectives and the levels of instrumental values as expressed in cultural policies.

We take as our critical focus the relative centrality of market-orientation within 30 European cultural fields (27 European Union Member States, the United Kingdom, Switzerland, and Norway) from 2014-2020, and use this to develop a typology of cultural policy. Four archetypes, *Resistant*, *Emergent*, *Established*, and *Dominant* (REED), are created to articulate the differing prioritisation of market-orientation across these nation-states. Existing typologies of nation-state cultural policies have been based on geographical proximity, shared cultural heritages, or generalised practices of state intervention. In contrast, the REED typology classifies the cultural policies of nations based on actual policy orientations and stated justifications. While not intended to fully replace existing archetypes, our typology offers a critical prism to comprehend the relative prioritisation of market-orientated justifications across European cultural policy regimes. It is a useful addition to ways of comprehending the complexity in international comparisons of policy approaches, given the variegated range of 'neoliberalisms' found across European nation-states. Moreover, this approach enables an evaluation of the scholarly contention regarding the growing influence of marketised (or neoliberal) logics in cultural policy, ultimately supporting the claim that cultural policy across Europe is 'post-marketised'.

We start the paper with a review of scholarship on 'neoliberal' and instrumental cultural policy. We then turn to a discussion of comparative cultural policy, existing typologies of cultural policy, and the concept of the 'cultural policy assemblage', which is a more effective basis for comparison of cultural policies across nation-states than national policies. After describing our methods, we present our findings on the relative centrality of market-orientation in the cultural policy assemblages in Europe. We set out the REED typology from our findings on market-orientation, our first measure of marketisation, and then examine the second measure, the instrumental values expressed in cultural policy, relative to the REED model.

Literature Review

'Neoliberal' Cultural Policy

It is widely argued that contemporary cultural policy is shaped by the values of 'neoliberal' governance. Under neoliberalism, disciplinary pressures are exerted on the subsidised cultural sector to conform to a market-oriented value regime in return for state subsidy (Alexander, 2018a; 2018b; 2019). McGuigan (2005) offers a conception of 'neoliberal cultural policy', which is summarised by Hesmondhalgh et al. (2015:99) as involving:

- the increasing corporate sponsorship of culture that might previously have been funded by public subsidy,
- an increasing emphasis on running public sector cultural institutions as though they were private businesses,
- a shift in the prevailing rationale for cultural policy, away from culture, and towards economic and social goals: 'competitiveness and regeneration'...and 'an implausible palliative to exclusion and poverty' ([McGuigan,] 2005:238).

For critics, such as McGuigan (2016), neoliberal ideology situates 'the market' as the only viable mechanism for informed decisions on the value of public resources, a hegemony which he presents as tacitly serving a financial and corporatist elite. Here the neoliberal state actively intervenes in society and the economy to ensure market logics operate unencumbered by external non-market influences, such as welfare provision, labour rights, and progressive taxation (Harvey, 2005:87).

While such a vision perhaps represents an emotive oversimplification, there remains various examples of the diffusion of neoliberal or marketised approaches in cultural policies across Europe. Alexander (2019; 2018a; 2018b) has mapped how the dominance of neoliberalism in UK cultural policy results in cultural institutions justifying state expenditure almost wholly on the grounds of extrinsic public impact, value for money, and effective business logics. This regime of justification is clearly visible in Arts Council England's *Let's Create 2020-2030* strategy, which states:

We will need to invest strategically, both locally and nationally, and link our investment to outcomes that the public have said they want... Over the next 10 years, we will work to improve the way we make the case for the social and economic value of investing public money in culture. (2020:18)

A similar value regime can be discerned in many European cultural policy strategies. These policy strategies form the basis for much of the subsequent analysis.

European cultural policy regimes also incentivise corporate sponsorship through indirect tax relief or tax breaks, resulting in a transfer in the designation of value from 'experts' to the 'market' (Savage et al.,

2020; European Fundraising Association, 2018; Alexander, 2014; Schuster, 2006; Wu, 2002). For instance, France's 2003 'Aillagon' Bill, which offered generous tax relief for corporate philanthropy, has transformed the value allocation in the French cultural field (Scottish Parliament/Drew Wiley, 2019; European Fundraising Association 2018; Frey and Meier, 2003). Relatedly, the mass privatisation of museums in the Netherlands following the 1993 Cultural Policy Act instigated a transfer of governance from the state to the private sector (van den Hoogen & van Meerkerk, 2018; EGMUS 2019). In Germany, there has been a similar shift towards market-oriented practices including public-private partnership management agreements for museums and an emphasis on limited company ownership models (i.e. GmbH) in the cultural sector (EGMUS 2018, Central Europe, 2011; Zahner, 2018).

These examples illustrate the generalised dissemination of neoliberal cultural policy across Western Europe. Indeed, Alexander & Peterson Gilbert (2020) found that all European nation-states express *some* degree of neoliberalism/marketisation in their cultural policies. However, as Brenner and Theodore (2002:353) point out, considering 'neoliberalism' as monolithic 'assumes identical results will follow the imposition of market-oriented reforms, rather than recognizing the extraordinary variations that arise as neoliberal reform initiatives are imposed within contextually specific institutional landscapes and policy approaches'. As several commentators note, various 'local neoliberalisms' result from the centrality of market-oriented rationalities in different geo-political contexts (see Peck & Theodore, 2019:246; Sevänen 2018; Schmidt & Thatcher, 2013; Hall, 2011:708). In addition, scholars have also criticised the term 'neoliberalism' itself as either over-politicised or empty (Boas & Gans-Morse, 2009; Rodgers, 2018; Dunn 2016; Whelan, 2015). Consequently, this article prefers the term 'marketised' (rather than 'neoliberal') to signify the practices undertaken under the auspices of marketised discourses, however heterogenous, in European cultural policy.

Market-Orientation in Policy Objectives

Drawing on the literature recounted above and building upon the McGuigan's central definition (2005; Hesmondhalgh et al. 2015:99), we have elaborated eight indicators of marketisation in the justifications provided for cultural policy, which we call *market-orientation*:

- *Privatisation*, which includes an emphasis on sources of private financial income within the cultural field, notably increased reliance on corporate sponsorship, commercial earnings, and trading activities outside the traditional scope of the subsidised cultural sector.
- *Tax regimes*, which recentre the allocation of resources and cultural connoisseurship from the state to the market.
- A policy focus on *public value*, consumer accountability, and a demonstrable return on state investment and value for money.

- Policy outcomes which can be characterised as traditionally *social policy objectives*, such as well-being and social inclusion.
- Policy outcomes which are economic in focus and centre on stimulating *economic policy objectives*, such as growth and wealth generation.
- *Deregulation*, desétatisation, and a turn to governance structures which mirror the operation of the private sector.
- Active integration of the subsidised cultural field into the creative industries and *creative economy* and the location of the subsidised cultural sector in discourses of innovation, entrepreneurship, creativity, and global competitiveness.
- *Limited labour market intervention* in the fields of cultural employment, including an emphasis on flexible employment and a focus on the entrepreneurial creative subject.

These characterisations, albeit being necessarily reductive, provide a basis for conducting a comparative analysis of the centrality of market-orientation in cultural policies across Europe.

Instrumental Cultural Policy

Instrumental cultural policy can be defined as the practice of using ‘cultural ventures and cultural investments as a means or instrument to attain goals in other than cultural areas’ (Vestheim, 1994:65). While instrumental justifications for state expenditure in the cultural field have a long history, they have increasingly come to eclipse ‘aesthetic’ justifications based on culture’s intrinsic value (Grey, 2008; Gibson, 2008; Belfiore & Bennett, 2008:140) or ‘aesthetic-expressive’ justifications which protect culture’s autonomy (Gielen, 2013; Graw, 2009). However, dominant evidence-based policymaking delegitimises aesthetic and auto-referential justifications for cultural spending. Belfiore (2007:188;200) argues that ‘cultural relativism’ undermines ‘cultural policy decisions grounded on uncontroversial principles of excellence, quality and artistic value’, creating problems of justification. The solution, she argues, ‘that the arts have chosen, or have been forced to follow, has been to “attach” themselves to other policy spheres that carry a heftier political weight’. This attachment to policy spheres with weightier socio-economic significance underpins the conception of ‘Instrumental Cultural Values’ that we use in this paper.

The term ‘value’ is traditionally understood by policymakers in terms of utilitarian neo-classical economics, the ‘additionality’ accrued with the efficient consumption of a good (Marshall, 2019:143). Value is often conceptualised, in the cultural policy context, as the ‘positive externalities’ (benefits) associated with a market-efficient cultural sector (Allan et al, 2013: 5). Instrumental cultural values are therefore indexes of perceived, or desired, positive externalities. Through a variety of methodologies, positive externalities are conceived in economic terms, with projected ‘surplus’ entered into a benefit-cost

ratio to justify state 'investment' (see O'Brien, 2010; Bakhshi & Throsby, 2010; Bakhshi, Freeman, & Hitchen, 2013; Klamer, 2003; Throsby, 2001).¹

At an EU level, instrumental values have emerged as key justifications for cultural subsidy in the EU which has resulted in a degree of isomorphism across EU-funded cultural initiatives (Schlesinger, 2015:9; Ahearne, 2003:129). As one European policy report (KEA & PPMI, 2019: 11) concludes:

At the European policy level, culture has progressively been mainstreamed in different agendas in order to foster socioeconomic development... [C]ultural and creative activities can act as an engine for territorial development and for cultural and creative tourism to European regions and cities... Culture strengthens the social capital of societies, facilitating democratic citizenship, fostering their creativity, well-being and critical thinking, encouraging integration and cohesion and promoting diversity, equality and pluralism.

Relatedly, McGuigan (2016:177), Campbell (2011) and Boland (2010) argue that the cultural values ascribed to the European Capital of Culture programme over the last 30 years are associated with values of socio-economic regeneration, economic growth, global competitiveness, and the integration of the cultural sector with the creative economy. Indeed, an instrumental emphasis on the 'creative economy' is a present in cultural policy discourse across Europe (Rindzevičiūtė, Svensson & Tomson, 2016) and is reflective of the assumed growth and regenerative potential of the creative sector under late capitalism. Market-oriented logics across European cultural sectors are strongly supported by notions of the 'creative industries' and its attendant manifestations in creative economies, creative cities, and a creative class (Lee, 2017; Bilton, 2010; Gielen, 2009:2; Pratt, 2008; Garnham, 2005; Howkins 2001; Ellmeier, 2003). Framing the subsidised cultural sector as part of the creative economy legitimises a demand-side focus in cultural policy, alongside a wide range of instrumental justifications (McGuigan, 2016; Greenhalgh 1998: 85; Wise, 2002:224; Hadley, Collins & O'Brien, 2020:158).

Instrumental Values in Cultural Policy

This review suggests that instrumental values that refer to social, economic and/or political benefits are increasingly used as justifications for cultural spending. Foreman-Wernet's (2020) analysis of 'values-orientated themes' across global cultural policy offers an important mapping of the stated benefits expounded by national cultural policy (also see Klamer, Petrova & Mignosa, 2006). Through an inductive grounded theory analysis of the websites of 92 nation-states, her work identified multiple thematic value

¹ Belfiore (2012:5) argues that while such a technocratic methodology suggests impartiality, placing an all-seeing 'market' as the arbiter of value merely obfuscates the inherently political nature of cultural policymaking. Other critics of this approach seek to escape the bounds of quantifiable value entirely, arguing that 'intrinsic value has to be articulated, not measured' (Hewison 2006, in O'Brien, 2010:41).

categories expressed in cultural policies, including National Promotion, National Identity, Cultural Diplomacy, Cultural Democracy, Funding, Professional Development, Arts Education, Economic Development, Social Cohesion, Cultural Diversity, Creativity and Expression, Cultural Rights, and Well-Being (2020:161). However, Foreman-Wernet does not offer a comparative assessment of the relative prioritisation of these categories within national cultural policy regimes. We therefore adapt her value categories (drawing also on Holden, 2004; 2006; O'Brien & Lockley, 2015; Kaszynska, 2015; Crossick & Kaszynska 2014; 2016; Brown, 2006; Brown & Carnwath, 2017; European Commission, 2018b; and Belfiore, 2020) but seek a more comparative assessment across nation-states. Overall, the literature suggests six clusters of Instrumental Values:

- **Civic Values:**
 1. Social Cohesion, Civic Action, and Social Capital
 2. Education, Cultural Literacy, and Creative Capabilities
 3. Health, Wellbeing, and Social Care
- **Politico-Economic Values:**
 4. Soft Power, Cultural Diplomacy, and Inbound Tourism
 5. Culture-led Regeneration, Placemaking, and Creative Clusters
 6. Innovation, Talent, Wealth Creation, and Creative Economies

These broad clusters provide a basis for conducting a comparative analysis of the centrality of instrumental values in cultural policies across Europe.

The 'Cultural Policy Assemblage' and Typologies of Cultural Policy

The challenges of producing a comparative account of European cultural policy are widely recognised (Ahearne, 2003; Schuster 1987; 2007; O'Hagan, 2017). Nevertheless, a body of valuable literature exists on the differing cultural policies across Europe (see Alexander & Hägg, 2018; Rius-Ulldemolins, Pizzi & Arostegui, 2019; Arostegui & Rius-Ulldemolins, 2018; Rius-Ulldemolins & Arostegui, 2013; Dubois, 2015; Klamer, Petrova & Mignosa, 2006, Mulcahy, 1998; Hillman-Chartrand and McCaughey, 1989, and Schuster, 1987). In recognising the increased marketisation in European cultural policy, standard cultural policy models are found somewhat wanting. Notably, Hillman-Chartrand and McCaughey's long-standing *Facilitator–Patron–Architect–Engineer* model does not reflect the internal complexity or 'hybridity' of contemporary cultural policy, which blends aspects of each archetype (see Dalle Nogare & Bertacchini, 2015; Dubois, 2015; Alexander & Rueschemeyer, 2005).

The conceptualisation of cultural policy as an 'assemblage' confronts such hybridity (see Savage, 2020). Here the critical focus is placed on the cultural policy *system*, as an ecology, rather than on individual policies (Foreman-Wernet, 2020:157; Holden, 2015). The cultural policy assemblage refers to a system of

actants and translation centres which constitute the subsidised cultural field as an actor network, incorporating the performative responses of funded cultural institutions alongside cultural policymaking bodies and attendant intermediaries (see Prince, 2017; 2010: 171; 2017; Wise, 2010:226). The cultural policy assemblage also overcomes another challenge of comparative cultural policy analysis: the existence of decentralised and devolved policy at regional, local or municipal levels (Schuster; 1997; Kawashima, 1997; 2002). The cultural policy assemblage includes both national-level and decentralised and devolved policy regimes in the cultural policy system. This enables comparisons among *assemblages* even when comparability of national-level cultural policy would be problematic. For instance, while it may be difficult to make claims for a singular German, Belgian, or Swiss cultural policy due to the regional devolution of policymaking, it is possible to offer a conception of a German, Belgian, or Swiss cultural policy assemblage and situate these in a comparative relationship, and therefore, we use this conception in our empirical approach.

Most existing typologies of European cultural policies prioritise Northern and Central European iterations, particularly emphasising English, French, Dutch, and German cultural policy. Southern and Eastern European countries have been relatively overlooked in comparative analyses, although there has been a recent growth in interest (see Rius-Ulldemolins & Arostegui, 2020; and Inkei, 2019). An informative corrective to this absence is found in the recent European cultural policy typology presented by Rius-Ulldemolins, Pizzi & Arostegui (2019). This ideal-type modelling is predicated on

- (a) the theoretical models of cultural policy [drawn from Esping-Andersen, 1993; Dubois, 2015]; (b) the historical trajectory produced by geographical proximity and belonging to previous political units (such as the Central European Empires); (c) belonging to either the Eastern Bloc after World War II or the EEC Bloc; and (d) data proximity. (2019:1051)

The largely geo-historical emphasis of this typology results in six clusters of European cultural policies (see Table 1).

Table 1: Models of European Cultural Policy (Rius-Ulldemolins, Pizzi & Arostegui, 2019)

Model	Nation-States
Liberal	United Kingdom, Ireland
Central-Western European	Austria, Belgium, Germany, The Netherlands, Switzerland
Nordic	Denmark, Sweden, Norway, Finland
South-Western European	France, Portugal, Italy, Spain
Central-Eastern European	Estonia, Latvia, Lithuania, Poland, The Czech Republic, Slovakia, Slovenia, Hungary
South-Eastern	Romania, Bulgaria, Croatia, Greece

Rius-Ulldemolins et al. (2019:1045-1067) outline a conception of such clusters:

The Liberal Model, characterised by weak State intervention and a consumer-based focus on 'High Culture'... The Central European Model, characterised by a conservative, subsidiary conception of the individual and society under the guiding hand of State support for High Culture and in which citizens are seen as passive recipients of what is offered... The Nordic Model, which involves strong decentralised State support for community-based culture—the consumption of which is seen as a participatory, inclusive activity. Southern European countries also share some common trends, such as State protagonism and a discourse similar to that found in the Central European Model. Yet their actions are much more strongly linked to conservation of the cultural heritage and they take a much more 'clientist' approach in their dealings with cultural sectors and consumers.

Their typology is valuable as it moves beyond broad policy archetypes by attending to actual policy expenditure, via their notion of 'data proximity' (p. 1051). This provides a crucial antecedent to the market-orientation typology we develop, as we seek an empirically grounded approach to understanding the degree and type of marketisation expressed in cultural policy assemblages across Europe. However, while there are clearly socio-cultural parallels in certain regions, the existence of geo-spatial proximity in the Rius-Ulldemolins et al. typology is less useful when policies of geo-politically close countries produce heterogeneous policies, such as when considering the specific impacts of different types of 'neoliberalisms', as described in the literature above. Indeed, it is the contention of this paper that rather than looking to geo-spatial proximity as the core variable within the European cultural policy field, it is instructive to use the relative prioritisation of market-orientated or instrumental objectives to understand the cultural policy field, how culture operates, and how it is justified across Europe.

Methodology

In our empirical work, our first goal is to provide a systematic measure of the degree of marketisation in cultural policy. Further, we aim to create a method that allows for the understanding of different instantiations of marketisation. We focused on two measures of marketisation, *market-orientation* and *instrumental values* in the cultural policy assemblages of 30 European nation-states (27 European Union Member States, the United Kingdom, Switzerland, and Norway) from 2014 to 2020. The source of data for both indicators was the *Compendium of Cultural Policies and Trends* (2020), which contains information on cultural policies across Europe from 2014-2020. This includes collations and summaries of national policies, based on an extensive database of European Cultural Policy analysis and documentation which draws over one-thousand policy sources, and which provides summative English-language translations of cultural policy materials. It is the most substantive and comparable dataset of European cultural policy currently in operation.

The two measures are conceptually distinct and are drawn from different sections of the *Compendium*. Market-orientation measures the presence of the eight indicators as themes in stated policy objectives, which are coded from four of the seven thematic chapters for each country as reported in the *Compendium* (Cultural Policy System; Cultural and Creative Sectors; Law and Legislation; and Financing and Support). The instrumental values indicators focus on the desired outcomes of policies relative to a variety of 'positive externalities' (Allan et al, 2013) or areas of 'policy attachment' (Belfiore, 2007). These indicators were coded from a fifth thematic chapter in the *Compendium*, Current Cultural Affairs. It is important to note, however, that while market-orientation in objectives and instrumental values for outcomes are analytically separable, in practice, they cover similar territory. As such, we use these as two, overlapping measures of the same phenomenon, marketisation.

Indicators of Market-Orientation

We measured the centrality of market-orientation in cultural policy assemblages by coding indicators of marketisation, as described in the literature (above). We created a heuristic measure to gauge the direction and magnitude of eight indicators of market-orientation (Privatisation, Tax Regimes, Public Value, Social Policy Objectives, Economic Policy Objectives, Deregulation, Creative Economy, and Limited Labour Market Intervention) in the cultural policy assemblage of each nation-state. We describe these indicators as 'vectors' as they indicate both a magnitude of market-orientation and a direction (positive or negative) as follows:

- 2 = Explicit rejection of the indicator
- 1 = Implicit rejection of the indicator
- 0 = No clear reference to the indicator
- +1 = Implicit deployment of the indicator
- +2 = Explicit deployment of the indicator

This coding system generated a comparative score for each indicator or vector. Summing across the eight vectors produced an informal measure that scored total market-orientation for each European nation-state. This enabled a simple but multifaceted measure of market-orientation that allows for an overall score for each nation-state, while individual vectors demonstrate the heterogeneous instantiations of market-orientation.

Indicators of Instrumental Values

To measure the presence of instrumental aspects of cultural policy, we coded the relative centrality of six clusters of instrumental values found in the European cultural policy assemblages (described above). To be clear, each cluster of instrumental values relates to policy 'attachment' (Belfiore, 2007), indicating that

cultural policy was justified in those terms (e.g. culture is valued as a contributor to social cohesion, to education, or to soft power). These measures do not refer to broader (and separate) social, education, or diplomacy policies. We looked for the presence of these six instrumental values in the objectives and justifications presented in policies and proclamations of the European cultural policy assemblages, divided, for analytical purposes, into two categories, *Civic values* (1. Social Cohesion, Civic Action, and Social Capital; 2. Education, Cultural Literacy, and Creative Capabilities; 3. Health, Wellbeing, and Social Care) and *Politico-Economic Values* (4. Soft Power, Cultural Diplomacy, and Inbound Tourism; 5. Culture-Led Regeneration, Placemaking, and Creative Clusters; 6. Innovation, Talent, Wealth Creation, and Creative Economies).

We developed a heuristic measure of the relative prioritisation of each instrumental value in cultural policy assemblages. Differences in emphasis were coded as follows:

0 = No mention of the value

1 = Implicit references to the value

2 = Explicit references to the value but not as a primary policy objective

3 = The value placed as a primary driver within cultural policy

The coding system generated six measures of the relative prioritisation of instrumental values in cultural policy assemblages.

In sum, we coded two sets of indicators of marketisation: market-orientation and the prominence of instrumental values. The analysis of market-orientation vectors led us to develop a classification of cultural policy assemblages across Europe. We then augmented the classification based on market orientation by overlaying indicators of the prioritisation of instrumental values in cultural policy.

Limitations

The challenges associated with any attempt at constructing a transnational public policy comparison centre on the scale and specificity of the national data, the reliability and generalisability of chosen variables, and the degree of abstraction employed to enable a comparable account (see Wenzelburger and Jensen, 2022). Our goal in this coding is to produce what are essentially qualitative (heuristic) measures that can be drawn for all 30 nations in the study. It is important to recognise that while these usefully allow for comparisons across nation-states, they work to reduce a consideration of complexity within the cultural policy assemblage of each. This trade-off—of complexity for comparability—is related to the challenges in conducting cultural policy research across nation-states discussed above. Further, we have relied on a collection of cultural policies containing expert-created summaries and translated documents. In other words, the *Compendium* is itself a series of distilled descriptions. This is why we have

only mildly ‘quantified’ the indicators of market-orientation and instrumental values. Further, our data are cross-sectional, and therefore, we cannot comment on causality. Nevertheless, the coding allows for an understanding of the different ways that nation-states adopt an approach that could be called ‘neoliberal’ (or marketised), adding texture to the discussions on more localised neoliberal approaches, as discussed above.

Results

The Centrality of Market-Orientation

Table 2 illustrates the presence or absence of market-orientation indicated by the vectors for the 30 European cultural policy assemblages. Each of the scores was summed for each nation to create an indicator of the overall strength of market-orientation in the cultural policy assemblage of each nation-state. Though the potential scores for market-orientation could range from minus 16 to plus 16, we found that the total market-orientation scores range from 1 to 15. Figure 1 illustrates the results for Europe on a map of the continent. This map, along with the data in the table, shows the penetration of a market-orientation across all European nations in the study, at least to some extent. This supports scholarly contention on the growing influence of marketised (or neoliberal) logics in cultural policy, and the claim that Europe is a ‘post-marketised’ location, one in which all nation-states have become marketised.

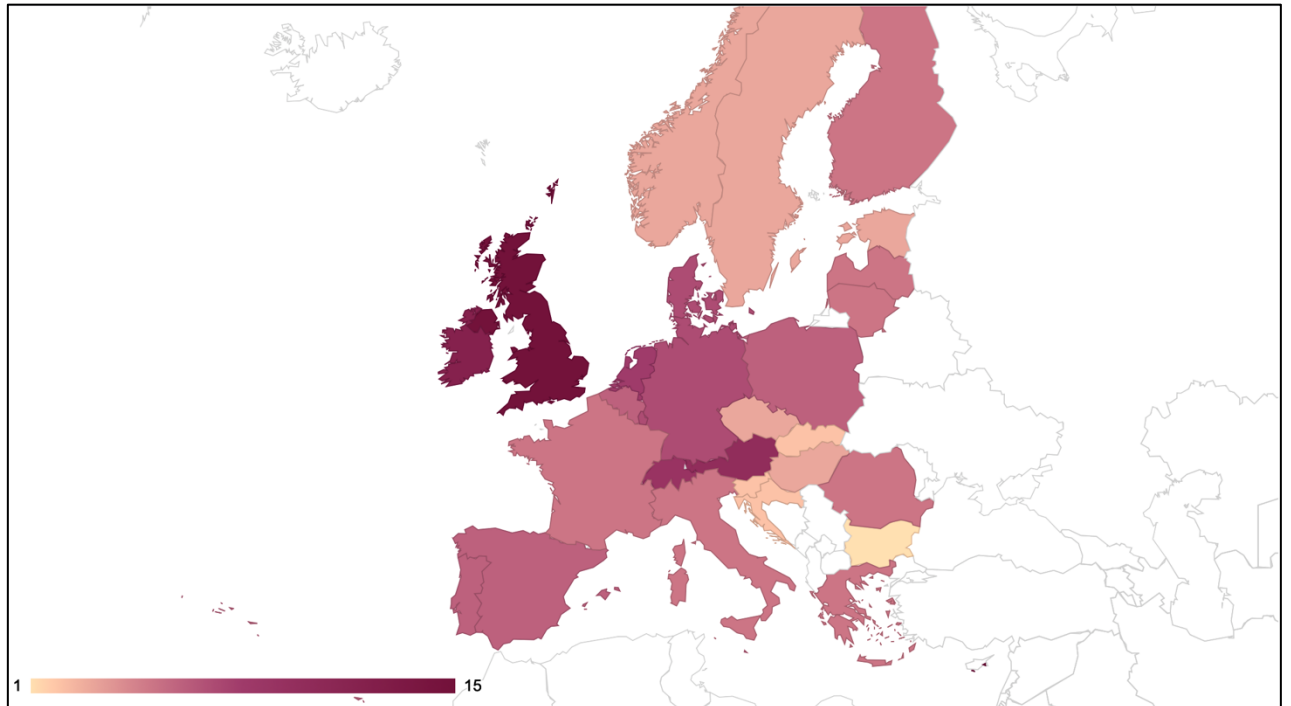
Table 2: Market-Orientation Vector Scores for European Nation-States

Austria	2	2	0	1	1	2	1	1	10
Belgium	1	2	1	1	0	1	2	-2	6
Bulgaria	1	2	0	-1	0	-1	1	-1	1
Croatia	-1	2	0	1	0	1	0	-1	2
Cyprus	0	0	1	1	1	0	0	0	3
Czech Republic	0	-1	0	1	0	1	1	1	3
Denmark	1	1	0	1	1	1	1	1	7
Estonia	2	-1	0	1	1	-1	1	0	3
Finland	1	0	1	1	1	1	1	-1	5
France	1	2	1	1	1	1	0	-2	5
Germany	1	2	1	2	1	1	1	-2	7
Greece	1	1	1	0	1	1	-1	1	5
Hungary	1	2	0	1	0	0	0	-1	3
Ireland	1	1	2	1	2	2	2	1	12
Italy	0	2	0	0	1	2	0	0	5
Latvia	1	1	0	2	2	-1	2	-2	5
Lithuania	1	2	-1	1	1	1	2	-2	5

Luxembourg	1	2	0	1	1	2	1	-1	7
Malta	0	1	0	1	1	1	1	1	6
Netherlands	1	2	1	1	1	2	1	-1	8
Norway	1	0	0	1	0	0	0	1	3
Poland	0	1	1	2	1	1	1	-1	6
Portugal	0	2	0	1	1	1	0	1	6
Romania	1	1	0	1	1	1	1	-1	5
Slovakia	1	-1	0	1	0	1	0	0	2
Slovenia	-1	1	-1	1	0	0	1	1	2
Spain	1	2	0	1	0	2	1	-1	6
Sweden	0	-1	0	0	1	1	1	1	3
Switzerland	2	2	1	1	0	1	1	1	9
United Kingdom	2	2	2	2	2	2	1	2	15

Key: V1: Privatisation; V2: Tax Regimes; V3: Public Value; V4: Social Policy Objectives; V5: Economic Policy Objectives; V6: Deregulation; V7: Creative Economy; V8: Limited Labour Market Intervention.

Figure 1: Heatmap of the Relative Centrality of Market-Orientation within European Cultural Policy Assemblages (2014-20)



The REED Typology

Using the same data as Table 2, Figure 2 places the total score for each country from lowest to highest. Ranking highlights the extent to which nation-states vary in the degree to which market-orientation is embedded into cultural policies. Using this data, we have divided nations into four categories, which we term Resistant, Emergent, Established, and Dominant (REED). These categories are defined as follows: (1)

Resistant cultural policy assemblages resist *some* aspects of market-orientation within their subsidised cultural field, often drawing on pre-marketised rationales. Nevertheless, there are tangible aspects of marketisation resulting in an inherent tension across cultural policy. (2) *Emergent* cultural policy assemblages are less obstructive to the use of marketised approaches in cultural fields. While there is a degree of resistance towards marketisation in certain areas of the cultural sector, marketisation is much more formally embedded in policy justification. (3) *Established* cultural policy assemblages have embedded a market-orientation within their policies. While such marketisation represents the central regime of justification across the subsidised cultural field, there remains scope for social-democratic and communitarian justifications for cultural subsidy. And (4) in *Dominant* cultural policy assemblages, market-orientation represents the driving logic behind the subsidised cultural field and there is very little opportunity for resistance to marketised approaches. This contrasts with the mixed models found in the previous three categories. This REED typology is summarised in Table 3.

Figure 2: Total Market-Orientation Scores Across European Cultural Policy Assemblages (2014 -20)

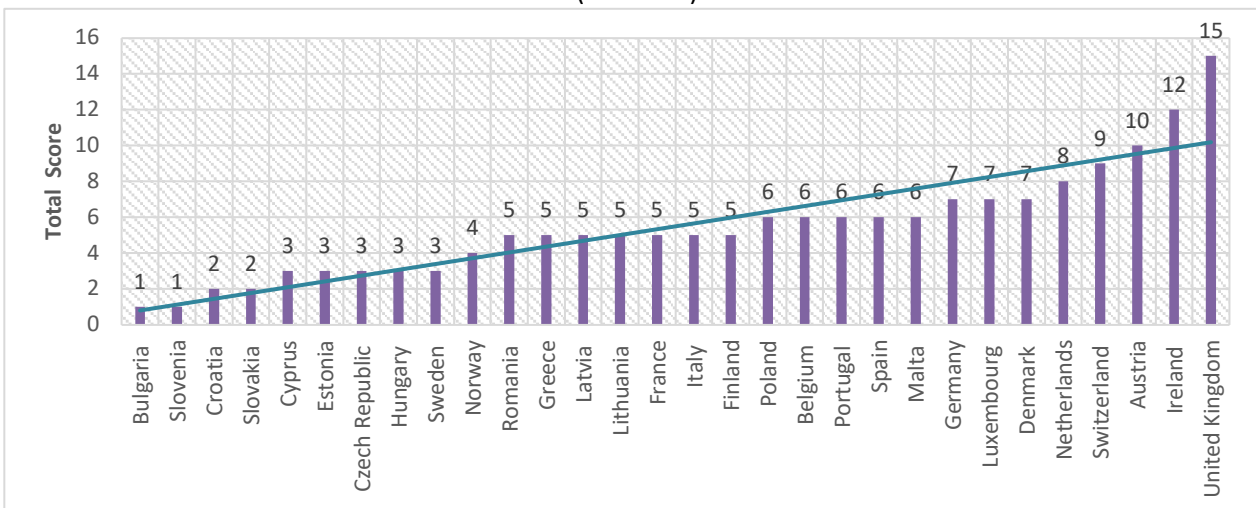
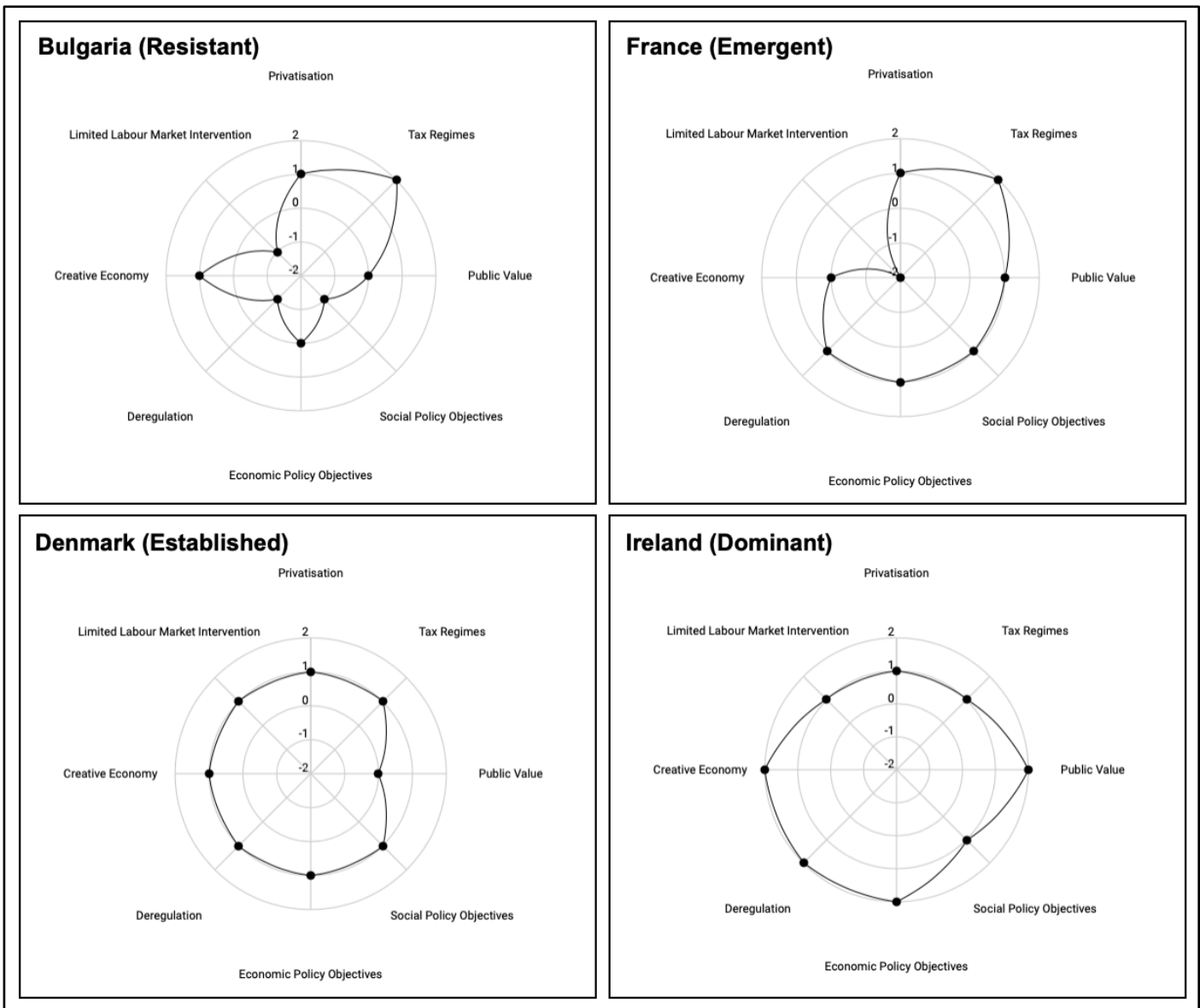


Table 3: The REED Typology and Associated Nation-States

Cultural Policy Architype	European Nation-states
<i>Resistant</i>	Bulgaria, Slovenia, Croatia, Slovakia, Cyprus, Estonia, Czech Republic, Hungary, Sweden, Norway
<i>Emergent</i>	Romania, Greece, Latvia, Lithuania, France, Italy, Finland
<i>Established</i>	Poland, Belgium, Portugal, Spain, Malta, Germany, Luxembourg, Denmark
<i>Dominant</i>	Netherlands, Switzerland, Austria, Ireland, UK

Figure 3 shows radial graphs from example nation-states, a paradigmatic snapshot, of each of the four REED categories, with scores for each vector. These figures illustrate the generalised presence of market-oriented values. These values are found, to some extent, in Resistant nation-states, they increase in centrality (from lower to higher scores) and are most strongly present in countries whose cultural policy model shows market-orientation as the Dominant approach.

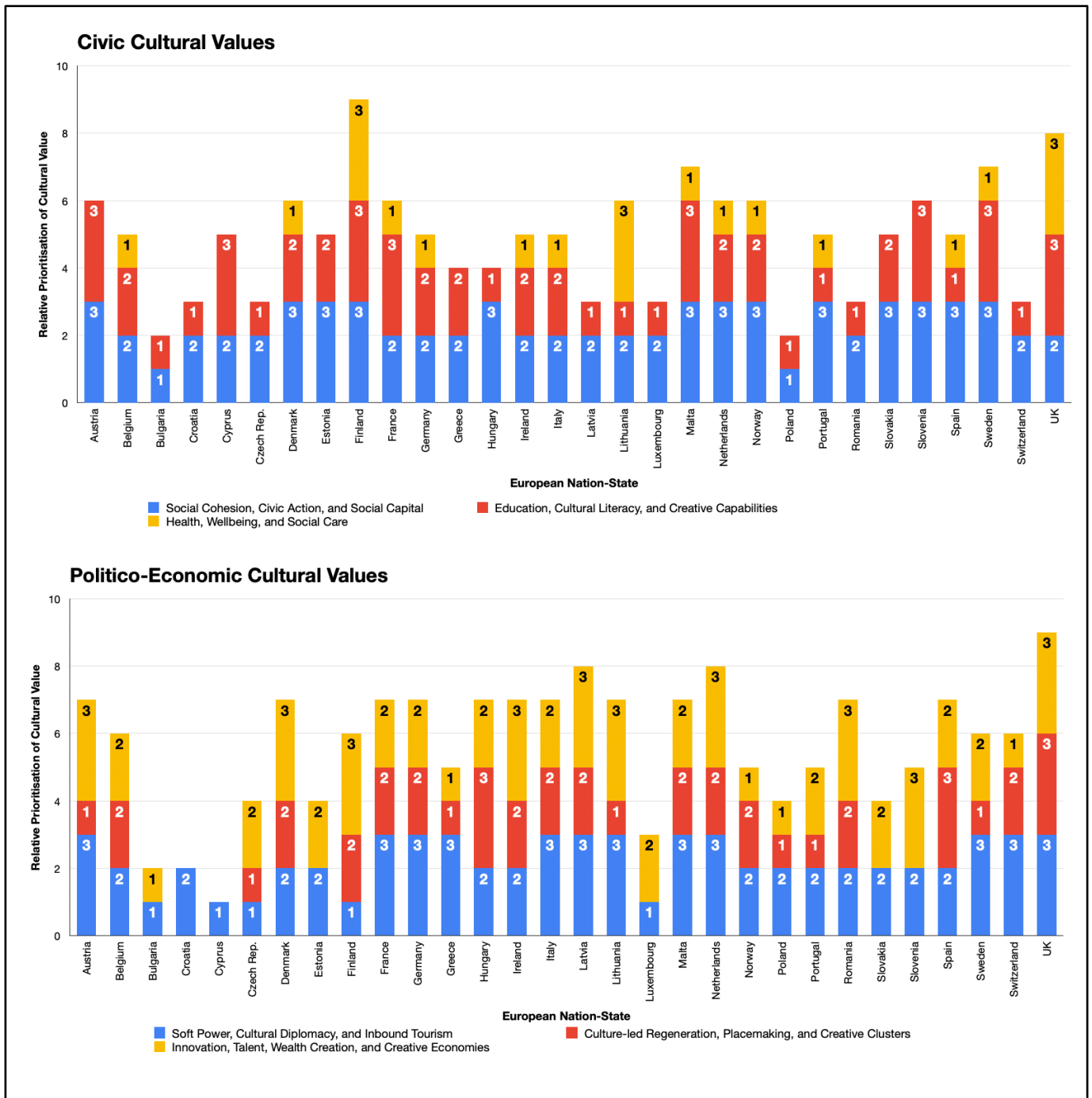
Figure 3: Example Radial Graphs for each of the REED Cultural Policy Models



The Prioritisation of Instrumental Values

Our results show that instrumental values, another measure of marketisation, are present in all the European cultural policy assemblages (see Figure 4). However, the relative emphasis on each type of instrumental value varied considerably across cultural policy approaches of nation-states, ranging from no mention of the value, through to the presence of the value as an explicit policy driver.

Figure 4: Instrumental Value Attribution (Scores 0-3, value scores are stacked within clusters).

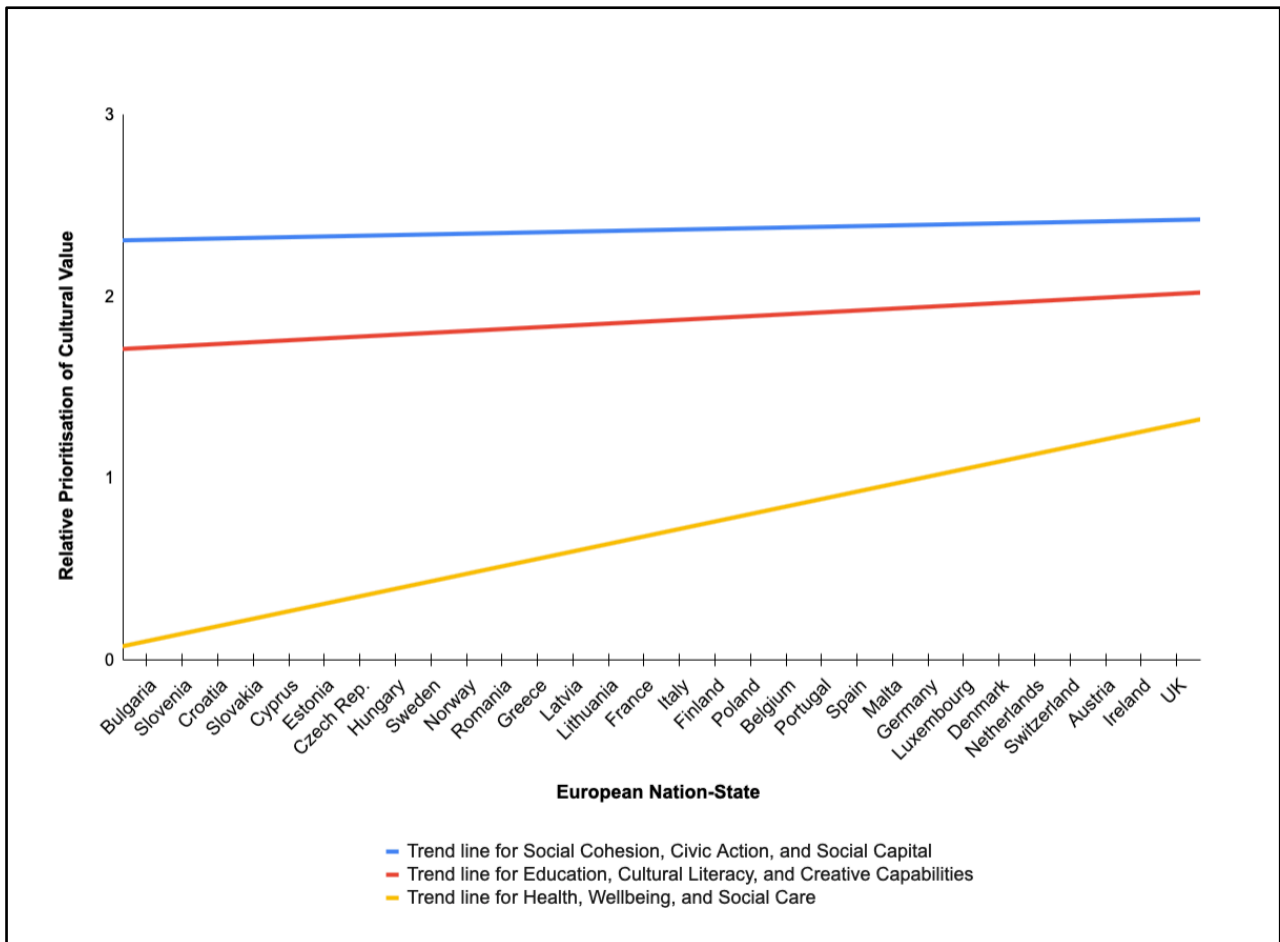


The uniform *presence* of instrumental values can be understood as further evidence of cultural policy isomorphism across the European region, often attributed to the homogenising impact of the European Union (Rius-Ulledemolins et al., 2019). We analyse the *differences* in the expression of civic and politico-economic instrumental values in cultural policy assemblages within the framework of the REED typology in order to provide further evidence not only for the post-marketised state of European cultural policies but also for the importance of understanding different configurations of marketisations across the continent.

Civic-Sphere Instrumental Values

Considering the civic-sphere instrumental values clusters in Figure 4 in relation to the REED cultural policy type, by placing value scores along the ranking of nation-states on market-orientation, provides evidence of trends in the use of instrumental values that are, as expected, consistent in their increasing use of marketisation (see the trend lines presented in Figure 5). Taken as a whole, an average increase in deployment of instrumental values around civic outcomes as a primary driver in cultural policy is visible as the figure moves from Resistant through to Dominant cultural policy assemblages. In other words, more market-oriented nation-states justify cultural expenditure more often in terms of instrumental values such as the impact of culture on social cohesion, its contribution to education, or its health benefits. A likely explanation for this finding is the need, under prevailing marketised logics, for the subsidised cultural sector to demonstrate value for money through extrinsic social impacts.

Figure 5: Average Prioritisation of Civic Cultural Values across the REED Cultural Policy Hierarchy.



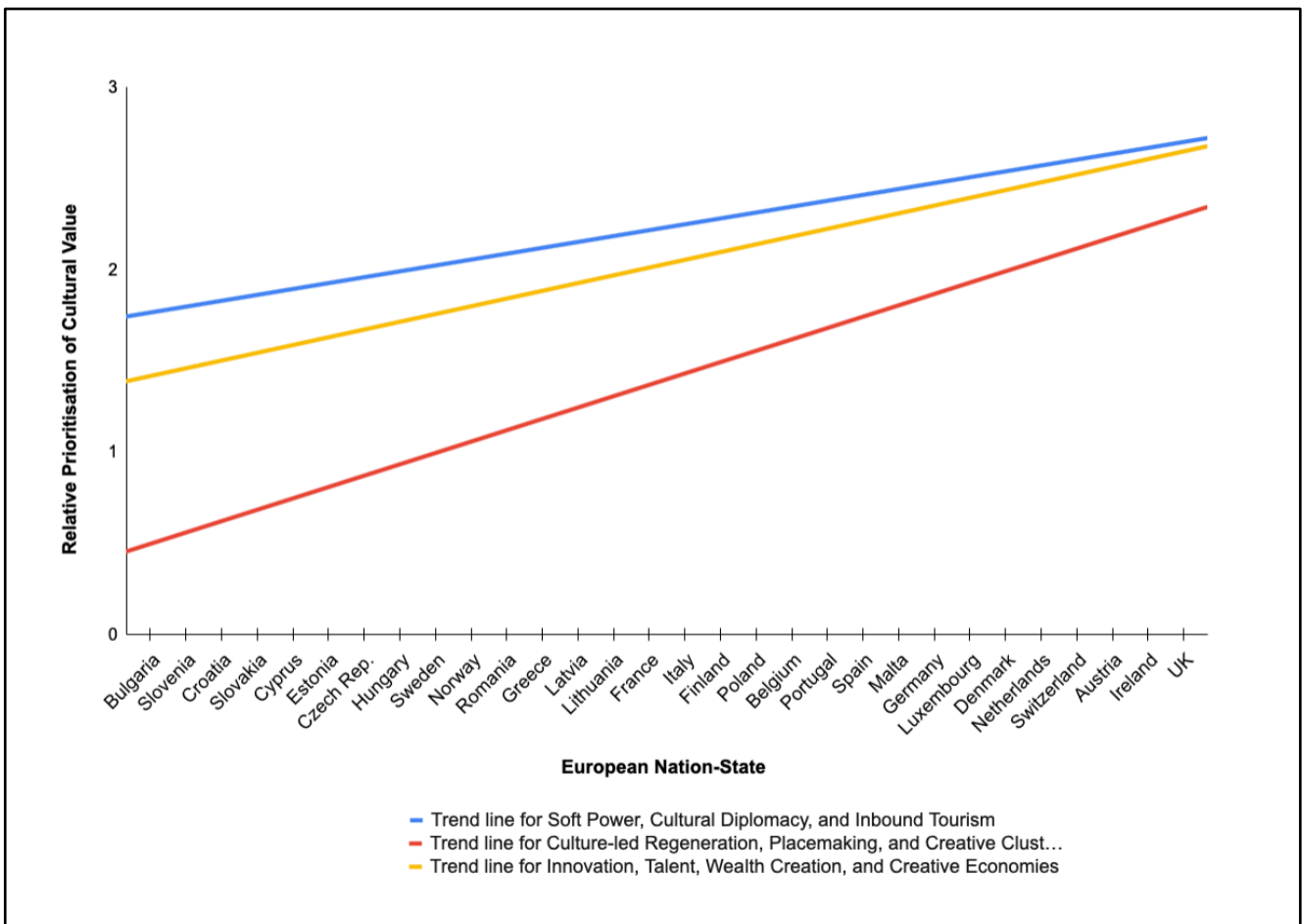
It is notable, however, that nearly all the cultural policy assemblages use Social Cohesion, Civic Action, and Social Capital values as either a primary policy driver or an explicit value (a score of 2 or 3; see Figure 4). The exceptions are Poland and Bulgaria, where such values are more implicitly alluded to within cultural policy assemblages. Similarly, the values associated with Education, Cultural Literacy, and Creative Capabilities are

present in the cultural policies of most European nations, although there is somewhat less consistency in their prioritisation across the different policy assemblages. The values associated with Health, Wellbeing, and Social Care are more variable, existing as primary policy drivers in two Resistant cultural policy assemblages (Lithuania, Finland) and one Dominant cultural policy assemblage (UK). However, it is significant that the nation-state which deployed the most market-oriented vectors, the United Kingdom, also demonstrated the highest prioritisation of civic instrumental values while the nation-state with the lowest deployment of market-oriented vectors, Bulgaria, exhibited the fewest indicators of civic instrumental values.

Politico-Economic-Sphere Instrumental Values

As with the civic-sphere instrumental values, our coding of politico-economic-sphere instrumental values can be placed in relation to the REED typology ranking. Much like the civic instrumental values, the deployment of politico-economic values as policy drivers and the relative centrality in market-orientation are associated, as expected (see Figure 6).

Figure 6: Average Prioritisation of Politico-Economic Instrumental Values across the REED Cultural Policy Hierarchy.



The general trend would support the thesis that post-marketised policy assemblages demand instrumental outputs and, unsurprisingly, Resistant cultural policy assemblages are less explicit in their citing of politico-economic instrumental values within cultural policy. It is telling that the values associated with Soft Power, Cultural Diplomacy, and Inbound Tourism are the most prioritised across all the REED categories, perhaps suggestive of a general move towards geopolitical 'soft power' concerns rather than the oft-cited cultural regeneration or creative cities discourses. Indeed, the deployment of politico-economic instrumental values is remarkably similar across the Emergent, Established and Dominant cultural policy assemblages. While the deployment of such values is less emphatic in the Resistant cultural policy models, it remains that explicit references are made to two clusters of politico-economic values with only the values associated with Culture-led Regeneration, Placemaking, and Creative Clusters absent in the Resistant cultural policy assemblages.

Discussion

In this paper, we have examined cross-sectional data to understand the level and types of marketisation articulated in the cultural policy assemblages of 30 European nation-states, drawing on cultural policy data from 2014 to 2020. The ability of our indicators to evidence variation in both degrees and kinds of marketisation is a key contribution of our research. This article offers an assessment involving two measures of marketisation, the differential deployment and centrality of market-orientation and the prioritisation of instrumental, civic and politico-economic values. Ultimately, this analysis presents both a descriptive modelling of the contemporary European cultural field and an analytical methodology with which to undertake future comparative assessments of European cultural policy.

The uniform presence of at least some market-orientation and some instrumental values in every nation state leads us to argue that the European cultural policy field is 'post-marketised'. In a post-marketised environment, marketisation is omni-present, by definition. Consequently, it is fruitful to consider the *different ways* that policy assemblages are marketised across nation-states. To this end, our research provides a range of indicators, eight market-orientation vectors and six clusters of instrumental values, that vary empirically. Here, our research supports theoretical arguments (Peck & Theodore, 2019; Sevänen 2018; Schmidt & Thatcher, 2013; Hall, 2011) on the existence of variable 'neoliberalisms' or types of marketised approaches to cultural policy found in cultural policy assemblages. We could call these 'national neoliberalisms'.

In developing the REED typology, we have followed Dalle Nogare & Bertacchini (2015) in their critique of oversimplified comparative typologies, such as the *Facilitator–Patron–Architect–Engineer* archetype, which remain influential within cultural policy literature. We took inspiration from the typology generated by

Rius-Ulldemolins, Pizzi & Arostegui (2019), which is underpinned, at points, by empirical data. However, this model results in clusters of geographical proximal nations (as can be seen in Table 1). Our contention is that marketisation is uncoupled from geographical proximities. Our model *starts* with empirical data rather than pre-existing sketches of nation-states or with geospatial proximity.

There are clear limitations with the REED methodology. Our indicators are heuristic and simplified, a conscious trade-off to facilitate comparison. We look at one key ideological orientation, sometimes referred to as 'neoliberalism'; other dimensions of cultural policy are, of course, relevant in many regards. Nevertheless, theorists have argued that neoliberalism has become the dominant philosophy underpinning vast swaths of contemporary society, including cultural policy (e.g., Harvey, 2005; McGuigan, 2016; Sevänen, 2018), and consequently, marketisation is a very important dimension to understand. It is our hypothesis that the degree and form of marketisation informs a wide variety of specific policy objectives, evaluation systems, funding methods, and the like, which subsequently affect all aspects of the cultural sector (c.f., Alexander, 2018b in the UK context). Thus, future research could fruitfully focus on the usefulness of our typology to understanding ramifications for the cultural sector, as well as to gauge changes to and outcomes of cultural policy, and the potential reactions of governments to threats to or opportunities in the cultural sector. Further consideration of the complexity around marketisation might lead to richer understandings of intra-national complexity (say, 'regional neoliberalisms' or 'local' ones), and longitudinal research that could disentangle the complexity of path-dependence versus policy convergence in the marketisation of cultural policy assemblages.

Moreover, it is our contention that this paper acts as a pathfinder for future comparative public policy research on the grounds of the relative centrality of marketisation within a post-marketised European cultural field, itself comprised of a variety of 'neoliberalisms' and attendant policy priorities. In other words, our model serves as a complement to extant typologies by providing a range of indications of marketisation, to demonstrate the widespread presence of marketisation along with complexity across nation-states as they vary in their instantiation of marketisation and to facilitate comparative research. This contributes to understanding the paradigm of post-marketisation in Europe with implications for cultural policy studies and the understanding of wider aspects of the art market and a variety of cultural sectors.

Conclusion

Our approach to European cultural policy assemblages and the REED typology offers a new prism for pan-European cultural policy analysis which is neither determined by geospatial proximity nor by reductive models of cultural policy intervention. The REED typology reflects the distribution of market-orientation

across the European subsidised cultural field while simultaneously articulating the difference in the relative centrality of this orientation and the prioritisation of associated instrumental values within individual cultural policy assemblages.

Moreover, in operationalising the notion of post-marketised cultural policy as constituted by a plurality of market-oriented approaches and instrumental values, this account sidesteps the implicit denunciations associated with the term 'neoliberalism' and resists the reductive, if oft cited, implication that cultural policies with less centralised 'neoliberal' values are culturally and morally superior. Indeed, the variance across nation-states on the market-orientation vectors and clusters of instrumental values suggest a significantly more nuanced picture across cultural policy assemblages in contemporary, post-marketised Europe.

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