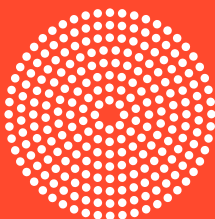
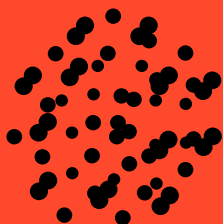
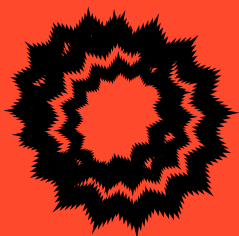
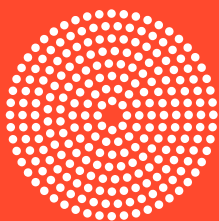


# IMPACT OF COVID-19 AND ZAGREB EARTHQUAKE ON CSOs IN CONTEMPORARY CULTURE AND ARTS

RESULTS OF THE TEST  
PHASE OF THE RESEARCH

Dr Krešimir Krolo  
Dr Željka Tonković  
Dr Dea Vidović  
Dr Ana Žuvela

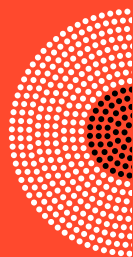


KULTURA NOVA  
E D I T I O N

WITH 74 CSOs IN 2019  
DIRECTLY CONNECTED...

3350

members, employees,  
associates, volunteers



71.6 %  
NGOs

28.4 %  
artistic  
organisations



70.3 % women  
29.7 % men

## VULNERABILITY

43.8%

of interviewees  
felt an existential  
threat

DAMAGES

80%  
Office  
space

57.1 %  
Space for  
cultural  
and artistic  
activities

35 %  
Office  
supplies

30%  
Equipment  
and other  
supplies

### IMPACTS

30.1 %  
impacted indirectly  
26.0 %  
impacted directly

56.1 %  
interviewees

EARTH-  
QUAKE

### IMPACT OF THE CRISIS ON VARIOUS WORKING ASPECTS [For more details see Image 7](#)

COVID 19

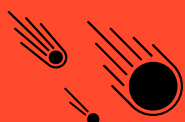
73.9 %  
Collaborations  
and networking

75.3 %  
International  
projects and  
collaborations

82.2 %  
Implementation of  
cultural and artistic  
activities

89.1 %  
Travel /  
mobility

ESTIMATED  
DECREASE IN  
ORGANISATIONAL  
INCOME IN 2020  
COMPARING TO 2019



Over 50% 28.4 % CSOs  
25-50% 32.4 % CSOs  
Up to 25 % 32.4 % CSOs  
Not expected 6.8 % CSOs

City of Zagreb 47.3 %  
Zagreb County 12.2 %  
Primorsko-goranska County 10.8 %  
Istarska County 8.1 %  
Splitko-dalmatinska County 5.4 %  
Other counties 16.2 %

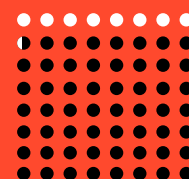
Interdisciplinary art  
New media art  
Audio-visual art  
Visual arts  
Theatre  
Dance and  
physical theatre

[For more  
details see  
Image 2](#)

## RESILIENCE

3585

planned activities  
/ 1.3.2020 – 30.6.2020



13.6 %  
cancelled  
86.4 %  
postponed /  
adjusted

PLANNED NUMBER  
OF VISITORS  
187,768



EMPLOYEES /  
ASSOCIATES  
INCLUDED  
2453



ONLINE  
ACTIVITIES  
648



### DIFFERENT APPROACHES

63.2 % Video-recordings  
of activities  
54.4 % Group events not  
intended for public  
45.6 % Live  
streaming  
30.9 % Online learning  
programs  
26.5 % Webinars  
23.5 % Online  
exhibitions

[For more details see Image 15](#)

### OTHER FORMATS

50.7 % Not applicable to  
our organisation  
21.9 % Activity is organised in  
public space (square, street)  
12.3 % Radio broadcast  
9.6 % Activity is organised in  
front of apartment buildings  
6.8 % Activity is organised  
on balcony/terrace  
4.1 % Direct TV  
broadcast

[For more details see Image 17](#)

### ADJUSTMENTS

80.8 % We apply with new projects  
78.2 % We adjust cultural and artistic  
activities to the new normal  
69.2 % We look for alternative  
sources of funding  
67.9 % We advocate for donors to  
transfer us approved funds  
57.7 % We create new cultural  
and artistic activities  
42.3 % We cut costs  
for programs

[For more details see Image 20](#)

## SPILLOVER

ESTIMATED AMOUNT OF UNREALISED  
FINANCIAL FUNDS

4,801,524 KN



Transport 748,616 KN  
Hotels 515,503 KN  
Design 475,905 KN  
Rent of equipment 471,744 KN  
Marketing 443,052 KN

[For more details see Table 9](#)

## 7 01 Introduction

---

## 15 02 Research results

---

### 15 02.1 Description of the sample

---

### 20 02.2 The level of the impact of the COVID-19 pandemic and the earthquake on the sector and the consequences thereof

---

#### 20 02.2.1 Consequences of the earthquake

#### 22 02.2.2 Consequences of the COVID-19 pandemic

---

### 35 02.3 Organisational resilience and adjustments

---

### 52 02.4 Spillover to ecosystem

---

### 54 02.5 Cultural policy measures

---

## 61 03 Conclusion

---

### 68 References

### 71 Impressum

# IMPACT OF COVID-19 AND EARTHQUAKE, THAT STRUCK ZAGREB ON MARCH 22<sup>nd</sup> 2020, ON CIVIL SOCIETY ORGANISATIONS IN CONTEMPORARY CULTURE AND ARTS

---

5

The Kultura Nova Foundation would like to thank all the representatives of civil society organisations who participated in the implementation of the test phase of the research and thereby provided the Foundation with insight into the immediate effects of the COVID-19 pandemic and the Zagreb earthquake on this sector, and who made it possible to understand the scope of the ensuing crisis.

There has been significant research into the impact that the global COVID-19 pandemic, caused by severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2), has had on the cultural and creative sector. This research has had various geographic and artistic scopes and, regardless of the focus, they have all established the drastic effects suffered by the cultural and creative sector due to compulsory health measures such as physical distancing, the closure of cultural venues (museums, galleries, theatres, cinema theatres, concert halls, cultural centres, etc.), cancellations of cultural events (concerts, exhibitions, theatrical performances, film screenings, festivals, etc.) or restrictions to the number of audience members permitted to attend public events. The European Parliament *Briefing* (Pasikowska-Schnass, 2020) on the EU support for artists and the cultural and creative sector during the coronavirus crisis mentions, among other things, a recent study on the economic impact of physical distancing measures in France which identifies the 'arts and leisure' sector together with the 'hotel and restaurant' as the hardest hit by the measures. Another recently published study (Montalto et al., 2020) on European creative cities during the COVID-19 pandemic notes that more than seven million jobs in the cultural and creative sector are at high risk due to the wave of cancellations and postponements of cultural events. Many studies have found that



closures of cultural venues and cancellations, postponements or shrinking of public events not only cause economic damage to cultural organisations, their employees, associates and artists, but also create a strong social unease and economic losses at all levels, particularly in cities. The shift to virtual space and the digitalisation of culture, as well as the utilisation of other electronic media, has not gone smoothly, primarily due to the insufficient capacities and resources of the cultural sector and the inability to “translate” all cultural and artistic formats into digital formats without additional adjustments, but also because such a shift results in access inequalities, since a large percentage of people globally do not have digital access. Closed borders and new border crossing regimes seriously restrict and complicate the mobility of artists, cultural professionals and cultural goods, as well as international collaboration. There is currently no end to the crisis in sight, and new waves of the pandemic are sweeping Europe and the world, meaning that many cultural organisations still need to comply with strict requirements for physical distancing, and it is likely that the consequences will be long lasting.

---

The Kultura Nova Foundation joined the efforts of many European and international organisations, institutions and supranational bodies in collecting data on the *vulnerability* and *resilience* of culture, and in May 2020 it initiated longitudinal research on the impacts of the COVID-19 pandemic and the Zagreb earthquake of March 22, 2020 on civil society organisations working in contemporary culture and arts. The key motivation for this research, apart from the obvious need to empirically identify the effects of the global crisis and the earthquake on the culture and arts sector, is the need to study these effects from different perspectives.

The first perspective involves emphasising and articulating the *relevance* of culture and arts, that is their role and position in social and economic processes during the crisis, and particularly during the post-crisis recovery period. Many studies emphasise the importance of culture in a period of social recovery, when it takes the central role in regeneration, when culture is both means and a tool for reconstruction and recovery because it strengthens the sense of community, shapes identities and diversities and makes it possible for intercultural dialogue to take place (UNESCO and WB, 2018). One of the main measures to mitigate the current global crisis caused by the COVID-19 pandemic is social distancing, and culture as the main driver of social interactions may play a crucial role in strengthening community and speeding up socio-economic recovery. The active contribution of the cultural sector to the future post-pandemic development of more resilient societies has been recognised in the European Commission study on European creative cities during COVID-19 pandemic, which emphasises the role of culture in helping to open public spaces for “safe, resilient and sustainable cities” (Montalto, 2020: 6), to create new alliances with the educational and scientific sector; to facilitate social recovery and most importantly to “meet Sustainable Development Goals” set as the main objective by the *New European Agenda for Culture* (European Commission, 2018).

---

The second perspective relates to the *vulnerability* of culture, that is, to the impact that the new circumstances caused by physical distancing and the earthquake have on the stable functioning of the culture and arts sector. The sector’s stable functioning is defined by the nature of cultural and artistic creation and cultural policy frameworks. There has been a negative impact in terms of work conditions and all other

elements of activity (income, programs, travels, collaborations and networking, sales, employment, venues, etc.).

---

The third perspective relates to the *resilience* of the cultural sector, its managerial capacities to adapt organisational and program functioning to the circumstances and measures of behaviour, and its readiness to conceptualise and implement new approaches and solutions that adequately, efficiently, innovatively and quickly respond to the crisis. One of the main paradoxes of the current pandemic is thus reflected in the cultural sector itself, which is at the same time fragile and resilient.

---

The fourth perspective includes the consequences that the *spill-over* of negative effects from the crisis in the culture and arts sector will have on the immediate surroundings. The disruption and/or significant reduction in the scope of activity and dynamics in the culture and arts sector has had numerous social, cultural and economic consequences which can be seen in the entire cultural eco-system, as well as in many other sectors.

---

The last perspective of this research relates to the public policy field, which includes the instruments, mechanisms and measures of international, national and local public policies implemented to prevent both immediate and long-term impacts of the crisis, including those that might be appropriate for the post-crisis period.

---

These perspectives are all very relevant to the Kulturna Nova Foundation, which provides support for organisational and program development for civil society actors working in the field of contemporary culture and arts. This particular

segment of culture and arts is not specifically represented in any of international studies and overviews of the impact of the COVID-19 crisis on the sector of culture and arts. The opposite is true, research into the impact of the COVID-19 crisis on the culture and arts sector is largely focused on monitoring the effects of the crisis on creative industries. Indeed, the focus is on monitoring the segment of the cultural field that is primarily driven by entrepreneurial development for the purpose of economic growth. As a result, the disruption to activity in the creative industries is primarily reflected in the stagnation of economic growth and prosperity. Economic growth and prosperity are perceived as the most relevant indicators of success in order to justify any kind of investment in culture and the arts. In other words, the effects of the crisis on the culture and arts sector, which is not mainly driven by economic growth, which is not its main *raison d'être*, have not been sufficiently studied regarding the impacts of the COVID-19 crisis on culture and the arts.

---

The lack of data and findings on the consequences of the pandemic for all segments of cultural and artistic activity, and particularly those segments based on non-profit, social and/or aesthetic values, can have a negative effect on crisis management and the financing of culture and arts, as well as on planning post-crisis recommendations for public cultural policies at all levels. Research into the impact of the crisis on the civil society sector working in contemporary culture and arts, which always operates under unstable conditions (Barada, Primorac and Buršić, 2016), therefore seems to be exceptionally important for gaining insight into the effects that the COVID-19 crisis has on cultural and artistic production, not as driven by economic gain but by artistic experiment and research, critical and reflexive practices and/or social and

local community engagement: the types of activity involved in building the contemporary identities of local community and contributing to their sustainable development. As stakeholders in the general socio-economic life of the country, however, their activities significantly contribute to positive economic dynamics, and to various other economic sectors, so these aspects too, as mentioned earlier, are included in this research.

---

The Foundation conducted the first test phase of the research in collaboration with researchers Dr Krešimir Kroló, Dr Željka Tonković and Dr Ana Žuvela in order to collect data on the immediate effects of the first wave of the COVID-19 pandemic and the Zagreb earthquake. A questionnaire was created and used to collect information on the effects of the pandemic and the earthquake on civil society organisations working in contemporary culture and arts, covering the period from March 1 to June 30, 2020. The test phase included a short period, the so-called “first pandemic wave” which resulted in the ban of all public gatherings in Croatia, including a number of cultural events in physical spaces, and a subsequently slow re-opening, and the questionnaire was designed to test some fundamental assumptions about the negative effects of the crisis on that specific segment of the cultural sector. The questionnaire was addressed to 172 organisations from the Foundation’s database of grantees, and included 57 questions designed to be answerable in 30 minutes. The questionnaire was completely anonymous and the Foundation guaranteed privacy and data protection for individual organisations. The questionnaire could be answered from July 10 to September 17, 2020 and organisations were invited by e-mail.

---

The first test phase included answers from 74 civil society organisations working in contemporary culture and

arts, which in 2019 directly involved 3350 persons (more than 1000 members, around 150 employees, over 1200 associates and around 1000 volunteers). The answers did not include audiences participating in and attending cultural and artistic programs in 2019 nor a number of stakeholders from other sectors that were indirectly connected to the operations of these organisations. Despite this, the sample already indicated many people (natural and legal person) who were directly affected by the impact that the COVID-19 pandemic and the Zagreb earthquake had on civil society organisations working in contemporary culture and arts. We can indirectly conclude from this data that an extremely large number of people in the cultural sector are affected by the COVID-19 pandemic and the earthquake, particularly if we take into consideration the entire socio-economic system connected to the activities of the organisations, institutions and individuals in culture (hospitality industry, public transportation, travel agencies, IT services, printing services, equipment rent and transport services, etc.). It should be noted that this is only a test phase of the research, which covers a short and very limited period of the crisis, and that the real impact of the pandemic and the earthquake needs to be monitored not only with respect to 2020 as a year, but also with respect to the long-term consequences, which will certainly include 2021 and probably the following years.

# Research results

## 02.1 Description of the sample

In the first phase the research included 74 organisations, most of which are NGOs (71.6%) and a smaller percentage of which are artistic organisations (28.4%). The majority are located in the City of Zagreb (47.3%) and in Zagreb County (12.2%), although the research covers 13 counties in total, including City of Zagreb. Considering regional distribution on the basis of the Kultura Nova Foundation regional division<sup>1</sup>, after organisations located in the City of Zagreb the largest number of organisations is located in “Region 2”, Primorsko-goranska County and Istarska County (18.9%), and the smallest number of organisations was located in “Region 4” (3.8%). In line with the county and regional distribution, the distribution according to the cities where organisations have their headquarters reveals that, after Zagreb, they are most frequent in Rijeka (8), Pula (4) and Split (3). This is comparable to findings from research conducted in 2014/2015 (Barada, Primorac and Buršić, 2016) which also suggested the uneven regional distribution of civil society organisations working in contemporary culture and arts.

1

The Foundation defined the following six regions in the Republic of Croatia for the purpose of its public call within the Support Programme - Development of Cooperation Platforms in the Republic of Croatia:

1. Zadarska, Šibensko-kninska, Splitsko-dalmatinska and Dubrovačko-neretvanska counties
2. Istarska, Primorsko-goranska and Ličko-senjska counties
3. Osječko-baranjska, Vukovarsko-srijemska, Brodsko-posavska, Požeško-slavonska and Virovitičko-podravska counties
4. Krapinsko-zagorska, Varaždinska, Međimurska, Koprivničko-križevačka and Bjelovarsko-bilogorska counties
5. Karlovačka, Sisačko-moslavačka and Zagrebačka counties
6. City of Zagreb.

Table 1 Distribution of organisation headquarters by county

	f	%
City of Zagreb	35	47.3
Zagrebačka	9	12.2
Primorsko-goranska	8	10.8
Istarska	6	8.1
Splitsko-dalmatinska	4	5.4
Osječko-baranjska	2	2.7
Dubrovačko-neretvanska	2	2.7
Koprivničko-križevačka	2	2.7
Karlovačka	2	2.7
Varaždinska	1	1.4
Vukovarsko-srijemska	1	1.4
Sisačko-moslavačka	1	1.4
Virovitičko-podravska	1	1.4
Total	74	100

Table 2 Distribution of organisation headquarters according to regions, as defined by the Kultura Nova Foundation

	f	%
REG 1 (Zadarska, Šibensko-kninska, Splitsko-dalmatinska and Dubrovačko-neretvanska)	6	8.1
REG 2 (Istarska, Primorsko-goranska and Ličko-senjska)	14	18.9
REG 3 (Osječko-baranjska, Vukovarsko-srijemska, Brodsko-posavska, Požeško-slavonska and Virovitičko-podravska)	4	5.4
REG 4 (Krapinsko-zagorska, Varaždinska, Međimurska, Koprivničko-križevačka and Bjelovarsko-bilogorska)	3	4.1
REG 5 (Karlovačka, Sisačko-moslavačka and Zagrebačka)	12	16.2
REG 6 (City of Zagreb)	35	47.3
Total	74	100

16 17

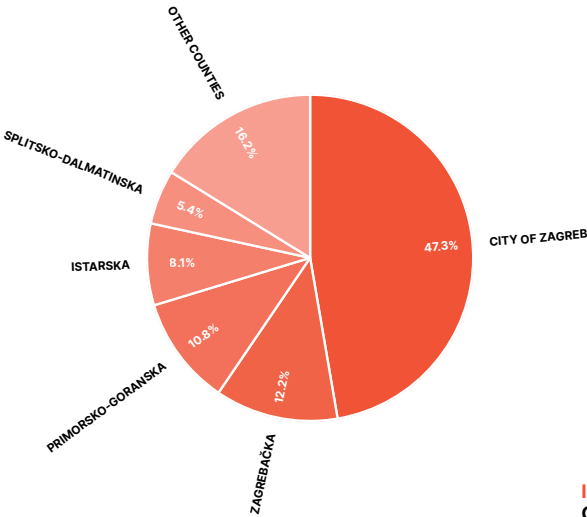
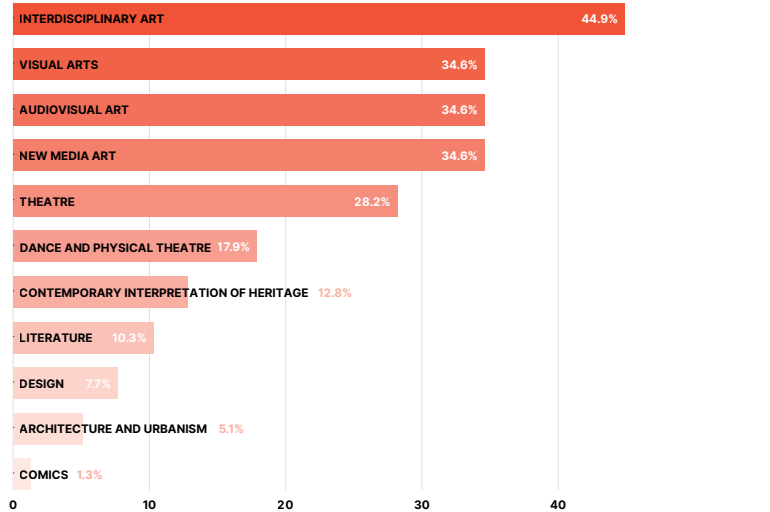


Image 1  
Geographical  
distribution of  
organisations

Interviewees could choose more than one field of cultural and artistic activity for their organisations (Image 2). According to the results, the largest percentage of organisations work interdisciplinarily (44.9%), including various artistic disciplines, diverse cultural expressions and connecting culture and the arts to different sectors and fields such as science, technology, and youth. This was followed by the fields of new media art, audiovisual art and visual arts (34.6% each), while the smallest number of organisations worked in the fields of design (7.7%), architecture and urbanism (5.1%) and comics (1.3%). Taking in consideration the diversity of the cultural and artistic fields in which organisations work, this question included the option for interviewees to choose other primary fields of activity. Six organisations in total mentioned other fields of activity: contemporary circus (f = 2; 2.6%), music

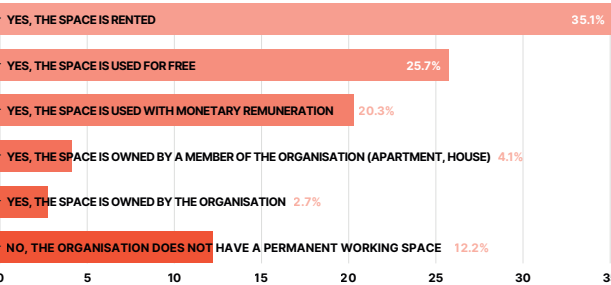


**Image 2**  
Primary field of cultural and artistic activity in organisations (%)

18 19

(f = 1; 1.3%), non-institutional culture and self-organising of the youth (f = 1; 1.3%), community work (f = 1; 1.3%) and contemporary and physical theatre (f = 1; 1.3%).

Earlier research in this sector has emphasised the issue of permanent working spaces for organisations active in contemporary culture and arts (Kardov and Pavić, 2007; Buršić, 2014; Barada, Primorac and Buršić, 2016), so this question was also included in the questionnaire. According to the results, most organisations work in commercially rented spaces (35.1%), more than a quarter in spaces they use for free (25.7%), and 20.3% work in spaces which they use in return for a monetary remuneration. Only 2.7% of organisations own the space in which they work. A number of organisations do not have any permanent space for work (12.2%). The majority of spaces are owned by local governments (41.9%), followed those owned by private natural (25.7%) and legal (9.5%) person. In a very small number of cases the owner is the regional government (5.4%) or the Republic of Croatia (6.8%).



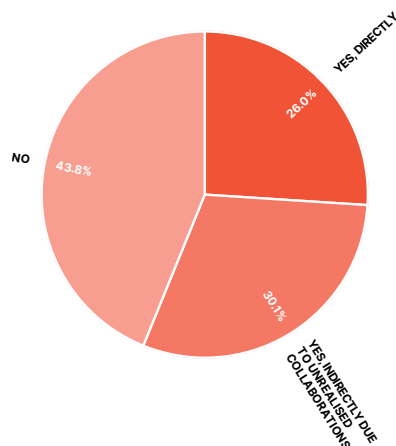
**Image 3**  
Does your organisation have a permanent working space? (%)

More than two thirds of interviewees were women (70.3%), which is comparable to the finding of research conducted in 2014/2015 (Barada, Primorac and Buršić, 2016). The average age of interviewees was 41 ( $M = 41.23$ ;  $SD = 9.29$ ; range: 26-63) and the age group between 36 and 45 was most represented (37.8%), with younger and older interviewees equally represented (31.1%). Eighty-nine percent of interviewees had tertiary education of some sort and most had an MA degree (63%).

## 02.2 The level of the impact of the COVID-19 pandemic and the earthquake on the sector and the consequences thereof

### 02.2.1 Consequences of the earthquake

Even though 52.7% of organisations covered by the research are located outside Zagreb, as many as 56.1% of them suffered the consequences of the earthquake that struck Zagreb on March 22, 2020. 26.0% of organisations were impacted directly, and 30.1% were impacted indirectly due to unrealised collaborations with Zagreb based organisations (Image 4).

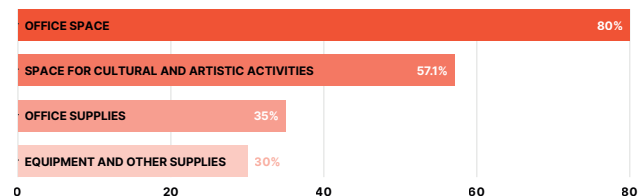


**Image 4**  
Was your organisation impacted by the earthquake?

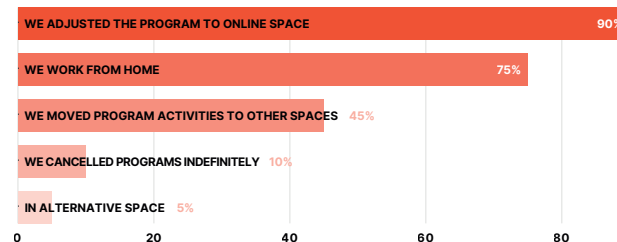
20 21

According to the research results, most damage was to office spaces (80%), and spaces for cultural and artistic activities (57.1%). This indicates high levels of disruption to the stable conditions required for the administrative work and production activities of organisations (Image 5). Consequently, 75% of organisations directly impacted by the earthquake work from home, 45% of organisations produce their activities in other venues, and 90% of organisations have adjusted their work for online virtual space (Image 6).

Interviewees were given several choices regarding the funds available for the reconstruction of spaces. The results show that in the majority of cases funding was secured by the owners ( $f = 8$ ), and a smaller number of organisations directly impacted by the earthquake secured funds from their own budget ( $f = 6$ ), from the public funds for reconstruction ( $f = 4$ ) or from the private funds of their members ( $f = 4$ ).



**Image 5**  
Damage to work spaces caused by the earthquake



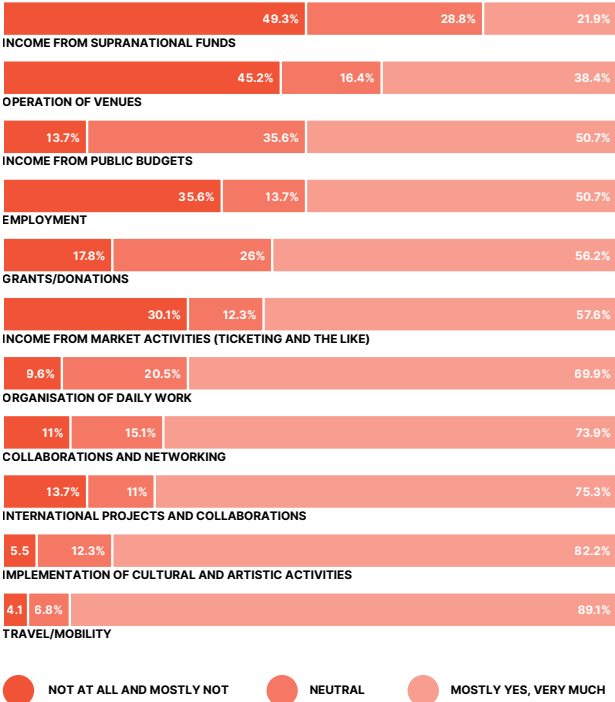
**Image 6**  
Where do you currently work?



02.2.2 Consequences of the COVID-19 pandemic

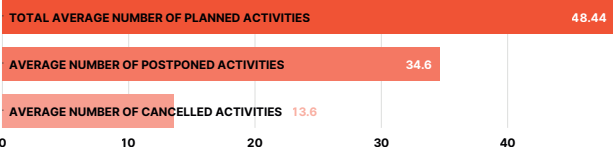
The research found that 43.8% of interviewees felt an existential threat due to the consequences of the crisis caused by the COVID-19 pandemic. In order to examine multiple effects of the crisis, the questionnaire included questions relating to different aspects of organisational work, the implementation of cultural and artistic activities, international programs and collaborations, and planned income.

**Working aspects** To gain insight into the direct consequences of the crisis caused by COVID-19 pandemic, interviewees were asked to choose from answers ranging from 1 (“not at all”) to 5 (“very much”) and evaluate the degree to which the crisis affected various aspects of their organisational work. As expected, planned travel and mobility programs were most affected (89.1% mainly yes and very much), followed by realization of cultural and artistic activities (82.3%), which is consistent with other data from this research. The results also show that the crisis has strongly affected international projects and collaborations (75.3%), as already noted, and networking activities and collaborations in general (73.9%), which is expected if we consider the restrictions and bans on travel, but also the fact that these projects are designed for and dependent on mobility, travel and *in vivo* meetings.



**Image 7**  
To what degree has the crisis caused by the COVID-19 pandemic impacted individual aspects of your organisation's work?

**Activities** Epidemiological measures related to the organisation of public events, including cultural and artistic programs, mean that one of the objectives of this phase of the research was to examine the extent to which planned activities had been cancelled or postponed, and how organisations adjusted to the changed circumstances. According to research results for the period between March 1 and June 30, 2020, 74 of the organisations had planned 3585 activities in total, an average of 48.44 activities per organisation. Only a quarter of all planned activities were cancelled (13.6 per organisation), but other activities were either postponed or adjusted to new formats (Image 8).



**Image 8**  
Planned, postponed and cancelled activities: average per organisation

In order to gain deeper insight into the consequences of the crisis caused by the COVID-19 pandemic for the implementation of planned cultural and artistic activities, the organisations were asked to estimate the number of cancelled and postponed activities in various cultural and artistic fields. The results are shown in Table 3. In line with the earlier results for the larger number of postponed compared to cancelled activities, the results show that in all cultural and artistic fields the total values (Total) and the values of the arithmetic mean (M) were higher for postponed than cancelled activities. For instance, for the category “exhibitions” the range of postponed exhibitions (0-14) is greater than the range of cancelled exhibitions (0-5), so the total values are accordingly larger too (107 postponed and 27 cancelled exhibitions), as are the average values per organisation (postponed:  $M = 1.45$ ; cancelled:  $M = 0.38$ ). On average most postponed and cancelled activities were workshops/training (355 postponed and 208 cancelled), film screenings (323 postponed and 204 cancelled) and theatre performances (211 postponed and 180 cancelled). In conclusion, the research shows that organisations opted for the total cancellation of planned activities less often.

**Table 3** The estimated number of postponed and cancelled cultural and artistic activities: the results of descriptive statistics

	Postponed activities				Cancelled activities			
	Min	Max	Total	M	Min	Max	Total	M
Theatre performance	0	80	211	2.89	0	80	180	2.47
Dance performance	0	24	93	1.27	0	10	41	0.57
Artistic performance	0	10	77	1.05	0	6	42	0.58
Concert / party / music event	0	50	151	2.04	0	30	76	1.06
Exhibition	0	14	107	1.45	0	5	27	0.38
Film screening	0	180	323	4.42	0	120	204	2.83
Literary events	0	120	180	2.50	0	20	45	0.63
Promotion / presentation	0	20	139	1.93	0	15	58	0.81
Round table / panel discussion / lecture	0	10	126	1.75	0	7	49	0.68
Workshop / training	0	70	355	4.86	0	70	208	2.85
Entertainment event (quiz, stand up, etc.)	0	23	76	1.00	0	20	54	0.74

**Employees and associates** Cancellations and postponements of cultural and artistic activities directly affected numerous employees and associates of organisations (e.g., artists and authors, curators, researchers) and led to the cancellation of their project contracts. Interviewees were asked to estimate the numbers of

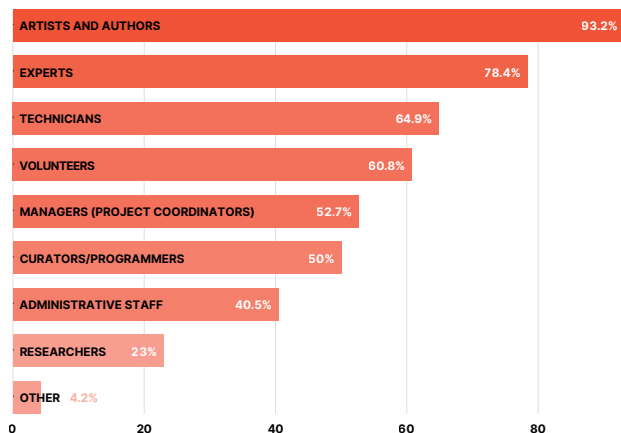
employees and associates involved in the preparation and implementation of the cultural and artistic activities that were postponed and/or cancelled during the period from March 1 to June 30, 2020 in different categories. The descriptive statistics in **Table 4** show that the largest number of employees and associates were “artists and authors” (total: 1144, average per organisation (M): 15.46), followed by volunteers (total: 473, average per organisation (M): 6.39) and experts (total: 359, average per organisation (M): 4.85). The lowest numbers among the provided categories were recorded for researchers and administrative staff. When the values in all categories are totalled, 2453 employees and associates were supposed to be involved in cancelled and postponed activities, indicating the degree to which this sector was impacted during the pandemic.

26 27

**Table 4** Estimate the number of employees and associates who were involved in the preparation and implementation of postponed and cancelled cultural and artistic activities

	Min	Max	Total	M
Artists and authors	0	95	1144	15.46
Volunteers	0	40	473	6.39
Experts	0	30	359	4.85
Technicians	0	11	167	2.26
Managers (project coordinators)	0	8	106	1.43
Curators / programmers	0	12	100	1.35
Administrative staff	0	12	60	0.81
Researchers	0	6	39	0.53
Other	0	2	5	0.07

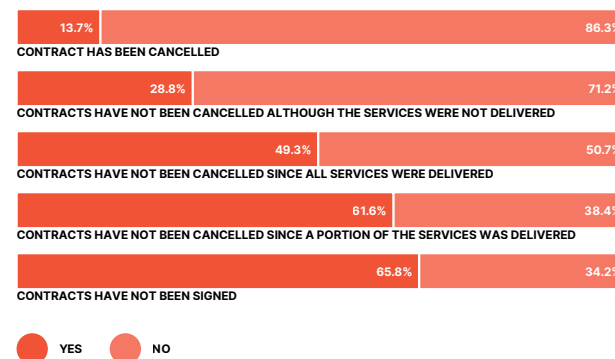
Analysis of the collected data shows the share of certain types of employees and associates involved in the planned activities of organisations participating in this research. **Image 9** shows that, as expected, almost all organisations planned to engage artists and authors (93.2%), and the majority involved experts (78.4%), technicians (64.9%) and volunteers (60.8%) in planned but cancelled or postponed activities. It is worth pointing out that almost 40% of organisations did not intend to involve volunteers, and those organisations which had planned to do so, were able to engage a smaller number of volunteers. The high value of the arithmetic mean is because a smaller number of organisations had planned to engage more than 20 volunteers each in their activities. As work in the non-institutional cultural sector is organised on a project basis, it is not surprising that over 50% of the organisations had planned to engage project managers.



**Image 9**  
Share of types of associates whose involvement was planned in the preparation and implementation of cancelled and postponed cultural and artistic activities

28 29

As evident from the results (**Image 10**), organisations very rarely cancelled project contracts with associates they had planned to involve in cancelled activities. Only 13.7% of organisations cancelled such contracts, and in as many as 65.8% of cases such contracts had not been signed at all.



**Image 10**  
Status of contracts with associates in the period from March 1 to June 30, 2020

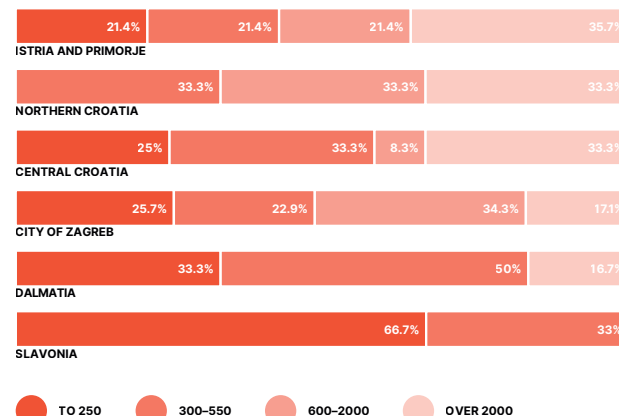
**Ticketing** Organisations mostly refunded cancelled and/or postponed cultural and artistic activities, including ticketing, fully, and only in one case did an organisation issue a voucher. The majority of organisations participating in the research, however, chose the answer “not applicable to our organisation” (80.8%). This may mean that organisations did not sell tickets prior to the event, or that organisations had not planned events which included ticketing as a source of finance in this period; in other words, that planned events were public and free of charge.

**Audience** Organisations were also asked to estimate the total audience in all planned activities that were cancelled or postponed in the covered period. The descriptive statistics show that the average audience per organisation (M) was 2572.16. When the data per organisation is aggregated, we see that there were 187,768 visitors to various activities that were supposed to be organised in the three-month period covered in the research. When individual values are analysed, however, most organisations, eight in total, estimated that they expected 300 visitors to their activities. For the purpose of further analysis, the values are divided into quarters:

- 26.0% of organisations up to 250 participants / visitors
- 27.4% of organisations from 251 to 500 participants / visitors
- 23.3% of organisations from 501 to 2000 participants / visitors
- 23.3% of organisations more than 2000 participants / visitors

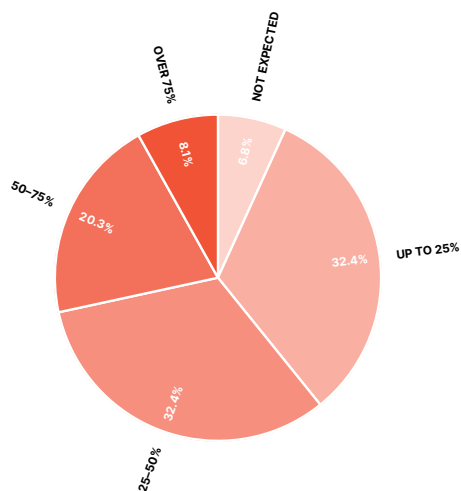
The information on the geographic distribution of organisations with respect to their estimated audience is telling. Seventeen organisations estimated the number of participants or visitors as more than 2000 in all planned activities, which were mostly located in Zagreb (6 organisations), Primorsko-goranska and Istarska counties (5 organisations) and Zagrebačka and Sisačko-moslavačka counties (4 organisations). Dalmatia comprises four counties and has only one organisation, which estimated its audience as more than 2000. One organisation is located in “Region 4” which comprises five counties in northern Croatia, while no organisation in the five counties in Slavonia estimated their audience for planned activities as more than 2000, nor in the category from 600 to 2000 (**Image 11**).

30 31



**Image 11**  
Regional distribution of organisations with respect to the estimated audience for all cancelled and postponed activities

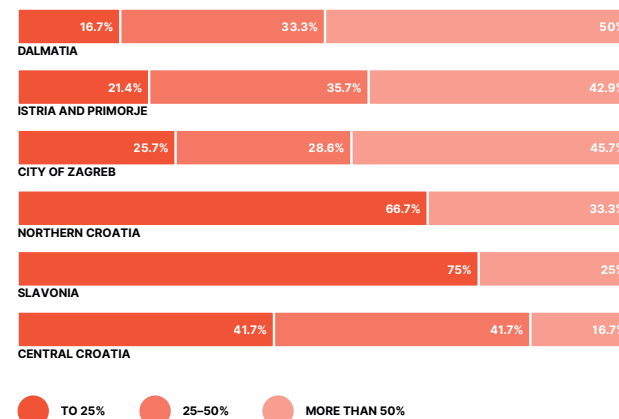
**Incomes** In addition to the various adjustments resulting from epidemiologic measures, and the inability to implement planned cultural and artistic activities and international programs, the effects of the crisis caused by the COVID-19 pandemic were evident in organisational incomes. In order to gain deeper insight into the impacts of the crisis on organisational income, several questions were asked to address the expected decrease in income in 2020, both in total amount and with respect to different sources of income. According to the results, the majority of organisations expected a decrease in income in 2020. 28.4% of organisations expected a decrease of more than 50% compared to 2019, and the same percentage of organisations (32.4%) is expecting a decrease between 25% and 50%, and up to 25% respectively (**Image 12**).



**Image 12**  
Estimated decrease in organisational income due to the crises (COVID-19, earthquake) in 2020

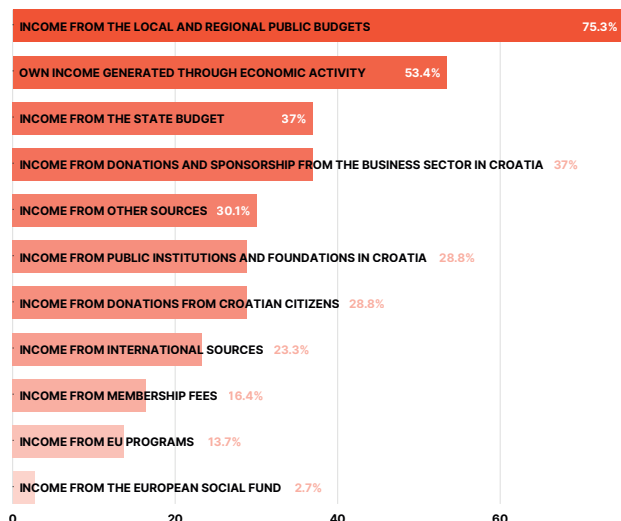
For the purpose of further analysis, organisations were divided into three groups according to their estimated decrease in income: up to 25% (21 organisations), between 25% and 50% (24 organisations) and over 50% (29 organisations). Even though the difference is not statistically significant, most organisations expecting decrease of over 50% are in Dalmatia (50% of all organisations from this region), followed by the City of Zagreb (45.7%) and Primorsko-goranska and Istarska counties (42.9%), whereas the share of organisations expecting a decrease of over 50% is significantly smaller in other regions (Image 13).

32 33



**Image 13**  
Estimated decrease of income in 2020: differences with respect to regions

Organisations expected the largest decrease in income from local city and regional budgets, 75.3% of organisations, and a little over half the organisations participating in the research (53.4%) expected a decrease in income from their self-financing economic activities. The results are shown in Image 14.



**Image 14**  
Share of individual sources of income which organisations expect to decrease in 2020

**Spaces** Five of the organisations participating in this phase of the research had to stop renting their office space (6.8%), three of which were in the City of Zagreb and two in central Croatia (Zagrebačka and Sisačko-moslavačka counties). Notwithstanding the small number of such cases, this information shows the extent to which the crisis caused by the COVID-19 pandemic threatened the survival of civil society organisations working in contemporary culture and arts.

## 02.3 Organisational resilience and adjustments

Shifting to the digital sphere and adjusting cultural and artistic activities for virtual space is one of the consequences of the measures restricting and/or banning public gatherings. The questionnaire contained several specific questions to examine the ways in which cultural organisations adjusted their activities to virtual space. First of all, we asked about the number of cultural and artistic activities that organisations adjusted to the online media, new format or media in the period from March 1 to June 30, 2020 and the number of new activities that they initiated due to the crisis caused by the COVID-19 pandemic. The results are shown in **Table 5**. Organisations adjusted 648 activities to online media, most of which were workshops/training (total 165, average per organisation 2.29), literary events (total 106, average per organisation 1.47) and film screenings (total 104, average per organisation 1.44). The total number of activities that organisations adjusted to some other format or media is less than the number of activities adjusted to online media, at 177, also mostly in the “workshop/training” category (total 22, average per organisation 0.31).



**Table 5**  
Estimated number of cultural and artistic activities that organisations adjusted to online media and other formats or media

	Activities adjusted to online media				Activities adjusted to some other format/media			
	Min	Max	Total	M	Min	Max	Total	M
Theatre performance	0	15	32	0.44	0	4	9	0.13
Dance performance	0	1	3	0.04	0	5	9	0.13
Artistic performance	0	5	16	0.22	0	4	19	0.27
Concert / party / music event	0	55	65	0.90	0	6	13	0.18
Exhibition	0	6	34	0.47	0	6	19	0.27
Film screening	0	40	104	1.44	0	8	21	0.30
Literary event	0	75	106	1.47	0	4	9	0.13
Promotion / presentation	0	13	52	0.72	0	9	18	0.25
Round table / panel / discussion / lecture	0	20	65	0.90	0	4	16	0.22
Workshop / training	0	35	165	2.29	0	10	22	0.31
Entertainment event (quiz, stand up etc.)	0	1	3	0.04	0	2	5	0.07
Other	0	2	3	0.05	0	6	17	0.25

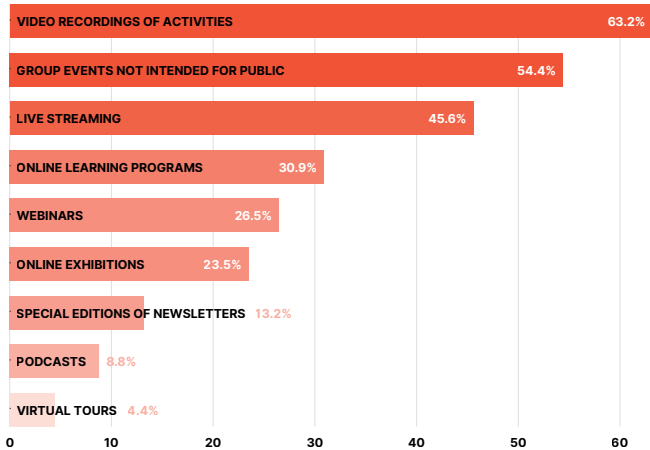
**New activities** In addition to the adjustments made by cultural and artistic organisations to the online environment and other formats/media, it might be assumed that the crisis caused by the COVID-19 pandemic would prompt organisations to produce new activities (Table 6). Two hundred and thirteen

new activities were initiated by organisations because of the crisis, and the majority involved film screenings (53), workshops/training (40), and literary events (21), as they are simpler to organise as regards technical requirements, and easier to implement in other media than, for example, activities in the performing and visual arts or music. The results also show that only a small number of organisations created new cultural and artistic activities in this period. The number of organisations in the total sample which introduced new activities ranges from 4 (dance performances) to 19 (workshops/trainings).

**Table 6**  
Estimated number of new cultural and artistic activities that organisations initiated because of the crisis caused by the COVID-19 pandemic

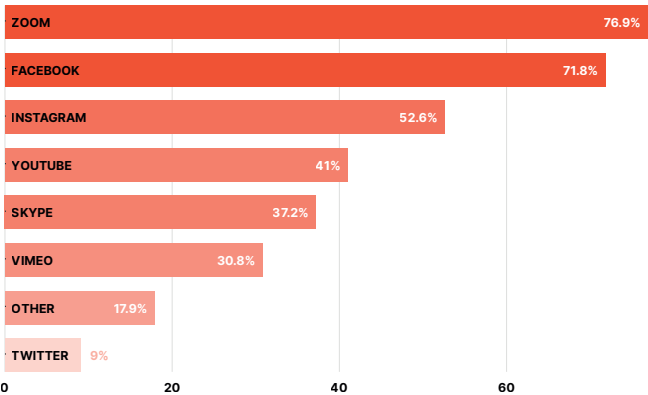
	Min	Max	Total	M
Theatre performance	0	2	9	0.13
Dance performance	0	1	4	0.06
Artistic performance	0	5	11	0.15
Concert / party / music event	0	2	8	0.11
Exhibition	0	3	9	0.13
Film screening	0	40	53	0.75
Literary event	0	5	21	0.29
Promotion / presentation	0	6	15	0.21
Round table / panel / discussion / lecture	0	5	18	0.25
Workshop / training	0	10	40	0.56
Entertainment event (quiz, stand up, etc.)	0	5	8	0.11
Other	0	6	17	0.24

**Online approaches** The organisation of cultural and artistic activities and their adjustment to virtual space can be implemented in a variety of ways. According to the research results, two ways were dominant, used by over 50% of organisations: distribution of video recording of activities via digital platforms (63.2%) and using platforms (e.g., Zoom) for group events not intended for the public (54.4%). Slightly less than half the organisations streamed activities live via social media (45.6%). All other approaches to adjusting cultural and artistic activities to online media, or to creating new digital activities were used in a smaller number of cases, such as learning various skills online (30.9%) or webinars (26.5%). Podcasts (8.8%) and virtual exhibition tours and/or tours of performing venues (4.4%) were the least used forms. The results are shown in **Image 15**.



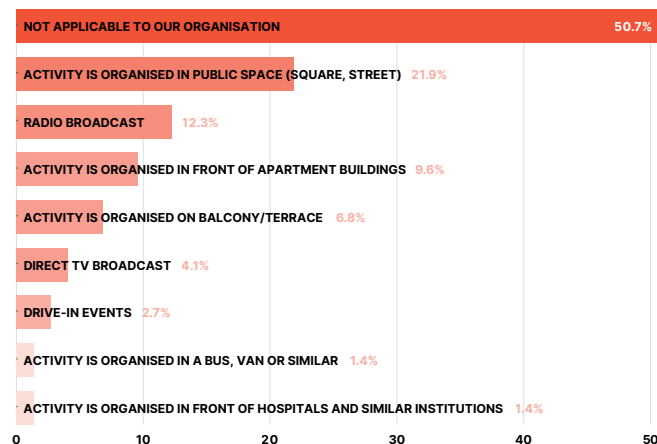
**Image 15**  
Different approaches to online cultural and artistic activities

**Platforms and networks** Most organisations used the Zoom platform (76.9%) and Facebook (71.8%), and to a lesser degree Instagram (52.6%), and other platforms were also used (**Image 16**). When answering this question organisations could also list other platforms used, and 17.8% of organisations did so. Platforms mentioned by interviewees included Jitsi, MS Teams, Google Meet, Mixcloud, Viber, and Twitch, and a segment of organisations used their own infrastructure and web portals.



**Image 16**  
Individual platforms for digital and online cultural and artistic activities

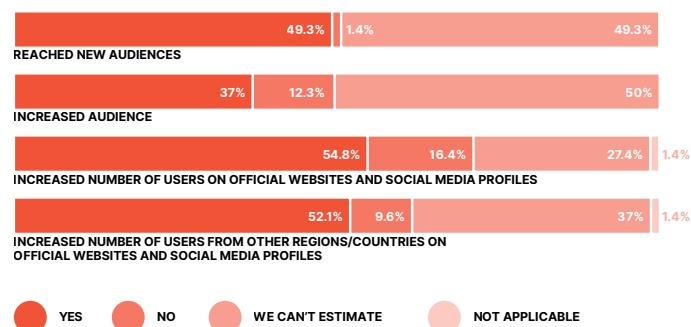
**Other formats** Despite facing disruptions caused by the pandemic and the earthquake, organisations found a way to stay in touch with their audiences, as shown in **Image 17**. In addition to the shift to digital space, they used numerous other media and formats for cultural and artistic activities (TV broadcast, radio broadcast, activities taking place on balconies/terraces/ in front of apartment buildings, hospitals, retirement homes, activities in open public spaces, on a bus, van or other vehicles, drive-in events, etc.). Such approaches show what is recognised by organisations themselves as their *resilience*, that is to say that these organisations do not surrender despite problems, but continue creating and deepening relationships with their communities and audiences.



**Image 17**  
Use of other formats/media for the adjustment of cultural and artistic activities

40 41

**Audience** The implementation of preventive epidemiologic measures severely restricted public gatherings, and numerous organisations used other formats and media to implement their programs and keep in contact with their audience. It was thus important to consider whether organisations noticed an increase in audiences in that period and how the content digitalisation affected the number of users on their official websites and social media profiles. According to the results (**Image 18**), almost half the organisations (49.3%) covered by the research estimated that digitalisation and the adjustment of cultural and artistic activities to other formats and media led to new audiences, and 37% thought that they increased their audiences. Just over half the organisations (54.6%) estimated that the number of users on their official websites and social media profiles was higher, and 52.1% felt that they had increased their number of users from other regions and countries.



**Image 18**  
Estimated increase in audience and the number of visitors on official websites and social media profiles

**Obstacles and challenges** Organisations encountered various obstacles and challenges while adjusting cultural and artistic activities to other formats and media, which they described individually in the questionnaire. Some of the main obstacles involved technological problems, ranging from technical infrastructure (inadequate network connection) and a lack of funds for program adjustments and the creation of their own network platforms to the insufficient informatical knowledge of users. Interviewees emphasised that the adjustment to online formats “is not an adequate replacement for live programs” stressing that, for example, performing arts “cannot be adjusted to online formats” and that “screening video recordings of dance performances is a bad adjustment.” A similar answer was given for contemporary visual arts, which are “most adequately perceived in the immediate live context”, as are concerts and music programs, as, according to interviewees, “it is meaningless to adjust them to any other format other than personal experience.” Local authorities were noted as creating obstacles and challenges, particularly in the City of Zagreb, because they restricted the payment of public funds to 25% of the contracted amount, which “made it significantly more difficult to plan activities and engage artists in the programs.” Finally, the answers indicate that there is a tangible fatigue among the associates who implemented online programs, and that the audience is saturated, with too many different cultural programs in digital space.

**Governance and management** The data shows the *resilience* of the sector and bears witness to the managerial skills of organisations in adjusting their organisational and program functioning to new circumstances and measures, and it testifies to their ability to create new approaches based on sustainability principles which respond to the crisis in an adequate, efficient,

42 43

witty and quick way. In order to examine how organisations perceive their own *resilience* in the crisis circumstances, the questionnaire contained a scale with eight statements in total, which, for the purpose of this research, was an adjusted version of the scale of organisational *resilience* (Kantur and Iseri-Say, 2015). As shown in **Image 19**, the representatives of organisations mostly completely agree with the statements referring to different aspects of *resilience*. For example, almost 70% of interviewees think that their organisation does not give up despite the challenging circumstances, and 54.8% think that their organisation can act quickly if needed and that the organisation survives and works continuously. Based on this scale, an index of *resilience* was calculated, which represents the total sum in each statement. There were no statistically significant differences with respect to regional distribution, nor other parameters such as the estimated audience in cancelled, postponed activities or estimated decreases in income.



**Image 19**  
The scale of organisational *resilience*: share of the answer “I completely agree”

**Organisational adjustment** In the same period the organisations made a number of changes in their work in order to adapt to the crisis caused by the COVID-19 pandemic in the short term, which include: postponement of business travel (93.2% of organisations) and working from home (64.9%), which is consistent with epidemiologic measures and recommendations during the analysed period. Since the majority of activities could not be implemented, it is not surprising that organisations worked fewer hours per day on average in the period between March 1 and June 30, 2020 due to unbalanced work distribution and working conditions compared to the period before the COVID-19 pandemic outbreak, when the average number of working hours per day was eight. The results in **Table 7** show that more than half the organisations (58.9%) postponed the engagement of associates, and only 20.5% cancelled contracts with associates. Just over half of organisations completely closed their venues for cultural and artistic activities (54.8%). A relatively large proportion of organisations cancelled contracts for outsourced services (39.7%) or postponed the payment of invoices (35.6%), which also indicates work-flow difficulties in the three-month period analysed. Despite the low percentage of organisations which laid off employees (13.5%) or lowered salaries (13.5%), this data makes us worry, as it indicates the extent to which the lockdown threatened the survival of organisations working in the field of contemporary culture and arts.

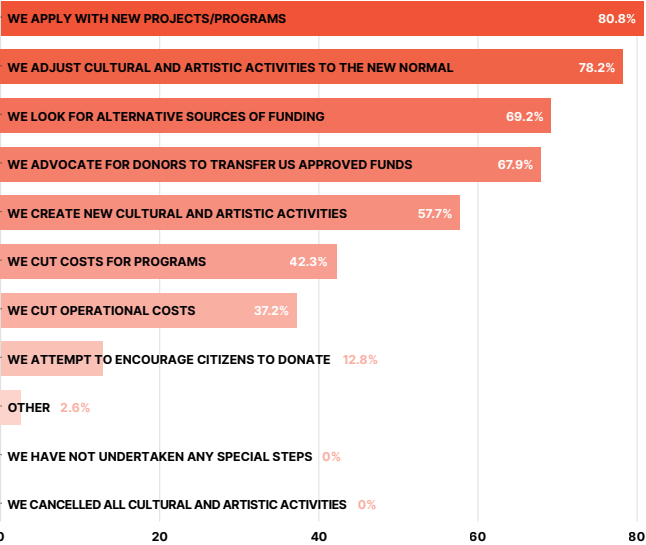
44 45

**Table 7 Changes to organisational work-flow in the period from March 1 to June 30, 2020 due to short-term adjustments to the crisis caused by the COVID-19 pandemic**

	Yes	No	Not applicable
We postponed some business travels (e.g. partner meetings, study visits, conferences, education)	93.2	4.1	2.7
We had all meetings using online tools	91.8	5.5	2.7
Events connected to the cancelled business travels were moved to online events	68.5	23.3	8.2
We organised work from home for employees (or some employees)	64.9	6.8	28.4
We postponed the engagement of associates until further notice	58.9	39.7	1.4
We introduced recommended protection measures for collectives and employers	56.8	12.2	31.1
We changed the work tasks of employees	56.2	32.9	11.0
We closed the venue for cultural and artistic activities	54.8	16.4	28.8
We cancelled some contracts for outsourced services	39.7	49.3	11.0
We postponed payment of some invoices	35.6	63.0	1.4
We provided the necessary information technology equipment for employees to work from home	32.4	41.9	25.7
We introduced a work regime in which some employees work from home and the others in the office, exchanging on a weekly/biweekly/ etc. basis	29.7	31.1	39.2
We cancelled contracts with associates	20.5	68.5	11.0
We engaged new employees/associates	17.8	72.6	9.6
We laid off some employees	13.5	56.8	29.7
We lowered salaries for the employees	13.5	64.9	21.6

**International projects** Measures restricting travel meant that the implementation of planned international projects and activities was particularly difficult in the period analysed. According to the research results, organisations implementing international programs and projects mostly resorted to the following short-term measures in order to adjust to the crisis conditions: organising all meetings online using digital media (62.5%), postponement of a segment of planned activities (59.7%), adjustment of a segment of activities to other formats and media (58.3%), adjustment of a segment of planned activities using digital media (54.2%) and postponement of a segment of planned travel (47.2%). A smaller number of organisations resorted to the cancellation of planned activities (5.6%), the adjustment of all planned activities using digital media (9.7%) or the adjustment of all activities to other formats and media (18.1%). It can be concluded that organisations adjusted to the extent they found necessary and avoided completely cancel all planned activities and adjusting them entirely to online formats.

A range of measures and activities (Image 20) were implemented, including applying for new programs and projects (80.8%), adjusting cultural and artistic activities to the new normal (78.2%), seeking new alternative sources of funding (69.2%) and advocating that donors pay granted but unpaid funds for the implementation of projects and programs (67.9%) in order to adapt to new circumstances and sustain organisations. Not a single organisation chose the answer “we have not undertaken any special steps to sustain the organisation” nor the answer “we cancelled all cultural and artistic activities in this year”, which is congruent with previously explained data for the number of postponed and cancelled activities.



**Image 20**  
Which of these steps do you take in order to sustain the organisation and its activities during the crisis?

**Lessons learned** In the context of organisational *resilience* and adaptation to the new circumstances of crisis that significantly threatened their status and position in not only the cultural system, but also in the wider social environment, the research featured a scale of answers to the question “What did organisations learn during the crisis?”. This question asked organisations to consider the insights they gained about their own position, program adjustments, communication with audiences, using digital media, adjustments made by associates/artists, and also the condition of the cultural sector overall. According to the results shown in **Table 8** interviewees agreed most with the following statements: we confirmed how vulnerable the cultural sector is (90.4%), we showed how important culture is for society (79.5%), we learned that not all cultural and artistic activities can be transferred to online media (76.7%) and we confirmed that people do not have equal access to online cultural and artistic content (76.7%). Three quarters of interviewees (75.3%) learned that not all cultural and artistic activities can be adjusted to other formats/media, and more than half of interviewees (56.1%) learned how to improve online communication with their team and partners. More than half the interviewees improved their use of digital media for cultural and artistic activities, but slightly fewer than half the organisations (47.9%) showed that they lacked sufficient capacities to adjust cultural and artistic activities to other formats/media. In addition to organisational capacities for the program adjustment, organisations (29.2%) noticed that artist have difficulties adjusting to new media formats and new circumstances (noticed by 18.1% of organisations). 43.8% of organisations learned to communicate better with potential online audiences during the crisis.

48 49

**Table 8** What did organisations learn during the crisis?

	Disagree (%)	I cannot tell (%)	Agree (%)
We confirmed how vulnerable the cultural sector is	2.7	6.8	90.4
We showed how much culture is important for the society	5.5	15.1	79.5
We learned that all cultural and artistic activities cannot be transferred to online media	11.0	12.3	76.7
We confirmed that all do not have equal access to online cultural and artistic content	23.3	21.9	76.7
We learned that all cultural and artistic activities cannot be adjusted to other formats/media	9.6	15.1	75.3
We learned how to improve online communication with the team and partners	9.6	34.2	56.1
We improved our use of digital media for cultural and artistic activities	16.4	30.1	53.5
It turned out that we lack sufficient capacities to adjust cultural and artistic activities to other formats/media	21.9	30.1	47.9
We learned to communicate better with potential audience online	13.7	42.5	43.8
We noticed that artist have difficulties in adjusting to new media formats	27.8	43.1	29.2
We noticed that artist have difficulties in adjusting to new circumstances	43.1	38.9	18.1



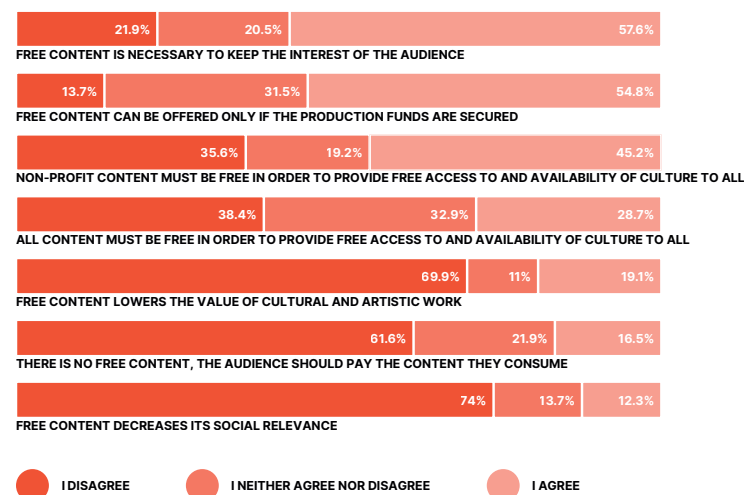
**Mutual support** Additionally, organisations often provided some type of support to other organisations, institutions and individuals in the field of culture during the crisis, and received different types of support from other organisations, institutions and individuals in the field of culture. The majority of interviewees gave some kind of positive answer to the question of whether their organisation received support from other organisations/institutions/individuals during the crisis, and what type of support. This support involved material support (providing temporary use of space, lending necessary equipment, giving funding and the like), mutual promotion, joint advocacy and action regarding decision makers or the development of joint programs. The institutional actors which provided support most prominently included the Kultura Nova Foundation and the Ministry of Culture of the Republic of Croatia. The owners of spaces also tended to at first lower the rent, and then to waive the rent entirely and not claim it from the organisations that used the spaces.

The second question about the type of support that organisations offered to other organisations/institutions/individuals in the field of culture during the crisis was answered in similar way to the first. The majority of organisations answered that they networked and looked for models of support together, gave their spaces for temporary use, exchanged information and so on. Here it is prominent the support the organisations gave to artists, for example, instead to “foreign artists, reallocated all funds for fees to Croatian artist” and paid full amounts of fees even when organisations did not have complete project budgets.

**Image 21 ↗**  
Agreement with the statements on free cultural and artistic content

50 51

**The right to access** The current crisis caused by the COVID-19 pandemic and the Zagreb earthquake prompted cultural organisations and institutions to adjust their activities to online space and other formats and media, which posed questions regarding open access to such content during the crisis. The questionnaire contained a scale of seven statements about free cultural and artistic content. According to the results (**Image 21**) the majority of organisations agree that free content is necessary to retain the interest of the audience (57.6%), and think that free content can be offered only if the production funds are secured (54.8%). There was also a large amount of disagreement with the statement that there is no free content and that the audience should pay for the content they consume (61.6%) and with statements that free content lowers the value of cultural and artistic work (69.9%) and their social relevance (74%). The results show that organisations active in the field of contemporary culture and arts are aware of the importance of equal access to cultural and artistic content.



## 02.4 Spillover to ecosystem

The data shows the effect of the crisis on organisations spilling over to the entire ecosystem, due to the important social and economic contributions that they make. Many of the planned activities that were cancelled or postponed due to the epidemiologic situation resulted in a significant amount of unspent funds. According to the results, unspent funds in the period from March 1 to June 30, 2020 amounted to almost 5 million Kuna (4,801,524 HRK). The largest economic effect was on the currently most threatened industries in tourism (such as transport, hotels, private accommodation, restaurant and bars, and travel agencies), and in the private sector providing specialised services for cultural organisations (rent and transport of equipment, design, architecture and printing). According to the data shown in **Table 9**, the largest amount involves transport costs (748,616 HRK total; 10,255.01 HRK on average per organisation), followed by the cost of hotel accommodation (515,503 HRK total; 6966.26 HRK per organisation) and design (475,905 HRK total; 6431.15 per organisation). This data clearly indicates that slowing down or stopping the work dynamics of civil society organisations working in the field of contemporary culture and arts had a significant impact not only on the people and organisations directly involved in the work, and the creation of cultural and artistic programs, but also on a number of economic operators whose services organisations used regularly for their projects. This has meant the effects of the crisis have spilled over from the cultural sector and left their traces on wider economic trends in the locations where organisations operate.

52 53

**Table 9** Estimated amount of planned and unrealised financial funds

	Min	Max	Total	M
Hotels	0	200,000	515,503	6966.26
Private accommodation	0	40,000	321,110	4339.32
Transport	0	350,000	748,616	10,255.01
Travel agencies	0	35,000	108,002	1459.49
Design	0	80,000	475,905	6431.15
Printing	0	60,000	428,016	5784.00
Architecture	0	35,000	90,002	1216.24
Accounting services	0	35,000	54,102	731.11
IT services	0	35,000	95,501	1290.55
Research services	0	35,000	74,001	1000.01
Consultants	0	35,000	61,002	824.35
Restaurants, bars and catering	0	250,000	414,661	5603.53
Rent of equipment	0	150,000	471,744	6374.92
Transport of equipment	0	180,000	353,307	4774.42
Marketing	0	180,000	443,052	6069.71
Other	0	80,000	147,000	2013.70

## 02.5 Cultural policy measures

The data laid out in the earlier chapters suggest similar results to that in other research conducted at the European and international level. This is, evidently, a sector which has been significantly impacted and threatened in the long-term, because the consequences of the measures to prevent and contain the COVID-19 pandemic along with those caused by the Zagreb earthquake are evident in the incomes of organisations, programs (creation, production, distribution, presentation, education), travel, networking and collaborations, sales, employment, and spaces (for work, creation, production, education). Unlike many experiences at the European level, however, a timely, concrete, or actually any reaction from local authorities in Croatia, was missing, despite the fact that they are, judging by the level of their budgets for culture and the ownership of spaces used by numerous cultural actors – institutions, civil society organisations and freelance artists, primary agents of the cultural system and providers of financial support for the cultural sector. All concrete cultural policy measures to alleviate the effects of the crisis caused by the COVID-19 pandemic in the cultural sector in the Republic of Croatia were passed by the Ministry of Culture, but these measures were not applicable on sub-national levels. For example, the Ministry of Culture made the *Decision on the postponement of the implementation of programs funded as public needs in culture, and on the conditions for payment of the grants in special circumstances* which significantly helped the implementation of a large number of programs in culture that have been postponed due to new extraordinary circumstances. This decision does not cover all programs funded as public needs in the Republic of Croatia, however, but only those funded at the national level. The Ministry of Culture is a public

body that opened new public calls for projects in 2020 with the purpose of providing support to the cultural sector during the crisis, such as *Art and culture online*, *Support for a segment of performing costs in the field of theatre, dance and music (classic and jazz music)*, *Programs of digital adjustment and creation of new cultural and educational content* or *Open call for concert programs within the project “Jer svirati se mora”*<sup>2</sup>.

At subnational levels in Croatia, we can see a sudden disruption or drastic decreases in the funding of non-institutional actors in the field of culture and arts. At the same time any type of quick and efficient reaction to the crisis that threatened the survival and functioning of the non-institutional cultural sector on the part of public bodies was missing. The lack of reaction is also evident from the absence of coordinated action on all levels of public bodies – from local to national levels, but also from the missing dialogue among key public and civil society actors in the cultural sectors on local levels. This dialogue could address the issue of creating new pillars of support that would be useful for the entire cultural sector and the local community. In order to examine the usefulness of potential measures, this research asked interviewees to estimate the usefulness of different types of support. According to the data from **Table 10**, the majority of interviewees (94.4%) recognised the usefulness of the payment of funds and the flexibility of providers of public grants. Equally high percentages of interviewees estimated as useful the government measures for keeping jobs (94.4%), followed by new program grants from the state budget (91.7%). Precarious working conditions in the civil society sector

54 55

have been additionally aggravated by this crisis, so it is not surprising that interviewees described institutional grants (funds for salaries) from the state budget as useful (90.3%), as well as the creation of the crisis fund for culture (90.3%). New program grants and institutional grants for the costs of salaries were also emphasised at the regional and local level: 88.9% for program grants and 87.5% for institutional grants. Organisations found donations and sponsorships useful in 84.7% of cases, and the waiver of rent for the spaces owned by public bodies in 77.8% of cases. Grants for digitalised and online cultural and artistic programs were deemed useful in 76.4% of cases, and strengthening organisational capacities for crisis management and digitalisation were deemed useful in 72.2% of cases. Organisations found government incentives for market activity and positioning useful in 65.3% of cases, which is equal to the percentage of organisations that found useful measures allowing for the postponement and suspension of tax payment on salaries and fees on the part of organisations, and those providing creation of trade unions of artistic organisations and cultural associations. The intervention of the private sector was described as partially useful (30.6%). Organisations described subsidised loans at the relatively equal percentages as useless (30.6%), partially useful (31.9%) and useful (37.5%).

56 57

**Table 10 Usefulness of individual types of support**

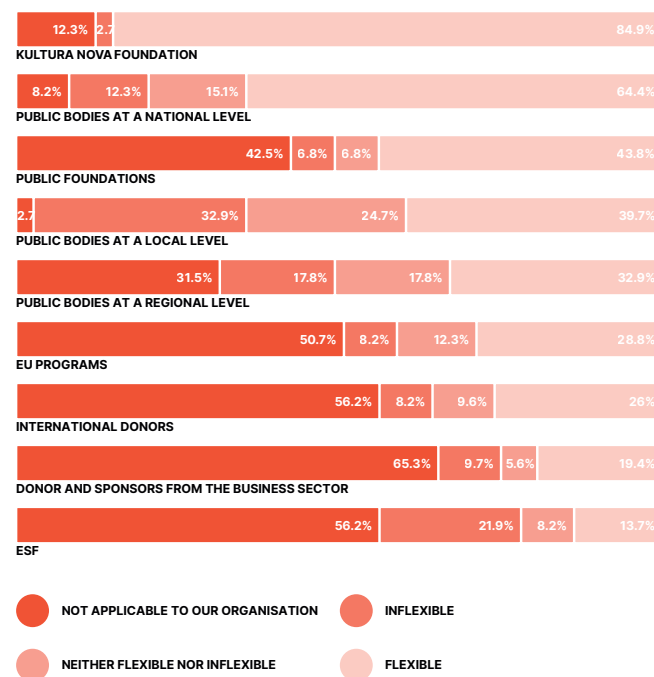
	Not useful (%)	Partially useful (%)	Useful (%)
Payment of funds and flexibility of providers of public grants	2.8	2.8	94.4
Government measures for keeping jobs	2.8	2.8	94.4
New program grants from the state budget	3.8	5.6	91.7
Institutional grants from the state budget (funds for salaries)	4.2	5.6	90.3
Creation of the crisis fund for culture	4.2	5.6	90.3
New program grants from regional and local authorities	2.8	8.3	88.9
Institutional grants from regional and local budgets (funds for salaries)	4.2	8.3	87.5
Donations and sponsorships	6.9	8.3	84.7
Waiver of rent for spaces owned by public bodies and used by organisations	6.9	15.3	77.8
Grants for digitalised and online cultural and artistic content and activities	4.2	19.4	76.4
Strengthening organisational capacities through education in crisis management	9.7	18.1	72.2
Strengthening organisational capacities through education in digitalisation	6.9	20.8	72.2
Government incentives for market activity and positioning	18.1	16.7	65.3
Postponement and suspension of payment of taxes on salaries and fees on the part of organisations	18.1	16.7	65.3
Creation of trade unions of artistic organisations and cultural associations	12.5	22.2	65.3
Intervention of the private sector	5.6	30.6	63.9
Subsidised loans	30.6	31.9	37.5

87.7% of organisations think that it would be useful to create a policy document on financing the cultural sector during a crisis, including clear recommendations. Although as many as 78.1% of organisations are familiar with some EU, national, regional and local crisis funds for cultural organisations, only 37% had already applied for such funds or were currently using such funds. Most organisations (83.3%) did not use any measures, but some used measures passed at the national level by the Ministry of Culture and the Croatian Employment Service. The most common measures used are support for employees, to retain jobs, a moratorium on loans, and measures for “payment of fees to associates despite postponements of program implementation”. Only the ERSTE Stiftung Crisis Fund for non-governmental organisations was mentioned as an international source.

In times of crisis, the efficiency and adequacy of measures passed by public (and private) bodies, institutions, organisations, and donors that are of a national and supra-national/international nature are very important, however, the way those actors react in comparison to standard types of support that are a part of their regular operations is equally important. This implies the need for higher levels of institutional understanding, systemic empathy and openness towards organisations that are in an exceptionally difficult situation, and have uncertain outcomes caused by the pandemic crisis. With this in mind, the research examined how interviewees estimate the flexibility of grants giving bodies with respect to monitoring the implementation. The highest levels of flexibility were estimated for the Kultura Nova Foundation (84.9%) followed by public bodies at the national level (64.4%). The next most flexible were public foundations at 43.8%, while public bodies at the sub-national level were

58 59

estimated at less than 40% (public bodies at the local level at 39.7% and public bodies at the regional level at 32.9%). More than half the organisations stated that the flexibility of international sources of funds did not apply to their organisation: EU programs (50.7%), international donors (56.2%) and ESF (56.2%). Most organisations (65.3%) stated that the flexibility of donors and sponsors from the business sector did not apply to their organisation.



**Image 22**  
Estimated flexibility of grant-giving bodies when monitoring implementation (reporting, postponement of deadlines etc.)

## Conclusion

The first phase of the Foundation's research into the impact of the COVID-19 pandemic and the Zagreb earthquake on civil society organisations working in contemporary culture and arts has confirmed the initial assumptions that the sector is under threat, but also capable of quickly and adequately reacting to the crisis. The implementation of measures that restrict or ban the organisation of public cultural events and the consumption of cultural and artistic content available to the audience in indoor (museums, theatres, cinemas, social and cultural centres and the like) and outdoor (squares, parks, streets and the like) venues, which is the *raison d'être* of the cultural sector and provides public support for creation and production, mean that the main principles/axis of the cultural and artistic sector are directly threatened – the need for interconnectedness with respect to creativity, collaboration and consumption, access to and the sociability of culture and arts, and the reaffirmation of basic human rights to culture. The research confirms that the *vulnerability* of the sector is reflected at all its organisational and program levels, including everyday routines of office work, spaces for production and distribution, education and discursive programs, income, travel, and international collaboration. The circumstances that have directly affected the cultural sector, by making it impossible or difficult to work, also spilled over to several

other sectors to which cultural and artistic organisations are connected, as confirmed by the data collected through this test questionnaire. The negative impact on the ecosystem shows the extent to which cultural organisations, whose foundational values are their artistic, aesthetic and social dimensions, contribute every day to the economic prosperity of the community and all society, among other things.

---

The *resilience* of civil society organisations working in contemporary culture and arts was confirmed, or more precisely their readiness to find solutions in times of crisis. Earlier research (Kardov and Pavić, 2007; Buršić, 2014; Barada, Primorac and Buršić, 2016) suggests that it is possible to assume that a quick reaction and the ability to respond to the negative consequences of the crisis derive from organisations permanently working in unstable conditions, which enables them to prepare quickly when facing a crisis, adapt and react to gradual changes or sudden disruptions in order to survive, recover and thrive. The fact that they are able to find solutions leading to a positive result is the consequence of the strategic imperative organisations chose to survive in the circumstances of an acute crisis. This *resilience* is also derived from the nature of their organisational culture which is flexible and non-hierarchical, so that organisations are more fit to adapt and change, and their program *resilience* is the consequence of cultural and artistic creativity with an inherent innovativeness of approaches and ability to create new artistic practices and/or organisational responses. However, the *resilience* of the organisations is not a quality that should be relied on in the long-term for further inadequate treatment of the non-institutional cultural sector by the public system and cultural policy. Quite the opposite: this *resilience* is not guaranteed if we consider that these organisations

permanently function under stress and under repeated imperatives to find solutions in times of crisis, which can cause severe organisational fatigue and anxiety in non-institutional cultural actors, who have already made great contributions to the culture and creativity of the Republic of Croatia, at both local and national levels, and on international level (Obuljen and Žuvela Bušnja, 2008; Švob-Đokić, Primorac and Jurlin, 2008; Švob-Đokić, 2010; Vidović, 2012; Tonković and Sekelj, 2016; Asturić, 2017; Vidović, 2018). The described *resilience* of the organisations, which is also shown in this research, is possible partly due to the flexibility of a certain number and profile of grant giving bodies, primarily those operating at the national level, but also due to the measures that these policy makers have designed and implemented. As the research results have shown that aid measures were mostly created at the national level, it will be necessary in the future to activate sub-national levels in crisis management and the financing of culture and arts. Future policy measures will also have to be harmonised with the real needs and specifics of various disciplines in the field of culture and arts to ensure adequate support for the recovery of this sector.

---

Like much other research, this initial phase of the Foundation's research has confirmed that it will be necessary in the future to pay attention to numerous aspects of work in the field of culture and arts that is impacted and changed by this global COVID-19 crisis. In order for some of these changes to have positive effects on the entire cultural sector, it is necessary to consider them from different angles, first of all, to ensure more stable working conditions in the cultural sector in general, but also for organisations working in contemporary culture and arts. This emerges as one of the key issues in the context of the *Sustainable Development Goals* and



new attempts by the EU Commission to connect them to the cultural and creative sector in the future, when these goals will have a central place in the EU recovery plan. The mobility of artists, cultural professionals and cultural goods, and international collaboration which involves travel as the basic activity, will need some new modalities based on a sustainable and green approach.

---

One of the more important aspects of work in the cultural sector relates to digitalisation and the numerous issues identified during the crisis, when creativity in the digital environment increased, as confirmed by the data from this research. The data from the Foundation's research has also shown, as already established by the study of creative cities in the COVID-19 era, that digital content "cannot be considered as a perfect replacement of the live experience" (Montalto, 2020: 6), because it is live meetings that specifically bring together and strengthen the community in the long term. This should be accompanied by data which indicates that the transfer of any artistic content to digital space is not always easy due to insufficient capacities and resources, and is not an adequate or possible solution due to the nature and specificities of individual artistic disciplines, primarily those in the performing and visual arts and music. The problems of the capacity of the cultural sector to work in the digital environment, like the issues of access and the availability of cultural content in digital space, are important for future planning. This is why, as mentioned in the cited study, it is important to be aware of new circumstances that demand a different strategic development and to continue to invest in sustainable models of cultural organisations in order for them to survive and have the capacity to use more robust digital infrastructure to improve digital access and overcome

64 65

digital, and also other forms, of inequality. Consequently, it is important to invest in the development of new skills for the creation of new formats and content in order to retain relationships with the existing audience, and develop new audiences, both online and offline (Montalto, 2020), despite the various restrictions of social distancing. Another important aspect of digitalisation relates to the public nature of the work in the cultural sector, which creates public spaces in which cultural and artistic content is publicly available. Considering that digitalisation in culture mainly takes place on digital platforms or using digital tools owned by private global multinational corporations not intended for culture and the arts, and with a completely different set of values and goals than cultural organisations, it will be necessary in the future to consider these aspects in order to integrate the values of public cultural and artistic activity into all aspects of digitalisation. It is also necessary to relate digital transformation to its impact on the environment and consider its relationship with "energy consumption, health risks and e-waste" (Maxwell and Miller, 2018: 52), which should not be ignored by cultural policies in the future.

---

In uncertain times of crisis and in the context of measures proscribing physical distancing and isolation, culture becomes more important, not only for its ability to offer content that affects individuals in an emotionally positive way, but also for its natural capacity to bring together members of society and have a positive effect on society in general, while developing the personal capabilities of individuals to act and behave in compliance with universal values. By making it possible for community members to participate and engage in culture, culture acts as a strong cohesive element and strengthens individuals for future action, and therefore, as

already mentioned, is the central point of the future regeneration of the entire society. In order for culture to be placed at the centre of the future crisis recovery plan, however, it is necessary to introduce collaboration at all levels, from the consolidation of the cultural sector to positioning culture on the mental map of policy makers in all sectors. With this goal in mind, the *A Cultural Deal for Europe* initiative has recently been presented, initiated by Culture Action Europe, the European Cultural Foundation and Europa Nostra. The intention of the initiative is to advocate placing culture at the core of the EU's post-pandemic future and to raise awareness on all levels and in all sectors of the importance of culture in recovery from the COVID-19 pandemic and the future of Europe. The initiative has published the joint statement, *A Cultural Deal for Europe*<sup>3</sup>, recommending concrete measures and actions ranging from the allocation of at least 2% of the EU's Recovery and Resilience Facility (RRF) to culture, the inclusion of culture in the *2030 Sustainable Development Agenda* and *European Green Deal*, the integration and financing culture through other EU programs and actions, to relevant and timely support for cultural workers. The new normal of an uncertain future demands new approaches and solutions not only at the European, but also at national and local levels. Despite various health, economic and social challenges, culture should play a key role in imagining and creating a more sustainable future.

— In any case, the data collected in this test phase of the research should be taken as a basis for learning and creating new policy measures, in order to respond efficien-

tly, and mitigate or adapt to the consequences of the crisis in future. Relying on empirical data and gained insights, the Foundation creates grounded estimates of effects and makes decisions on further activity, which places it within a narrow circle of institutions that are dynamic, flexible, adaptable and responsive in planning their own work and having argument-based effects on cultural policy and development. The data collected in this research can help to upgrade the cultural policy framework within which it is necessary to create adequate responses to improve working conditions in civil society in the field of culture, and to realise cultural rights for all citizens of the Republic of Croatia. The methodology and research instruments identified within the framework of the Foundation's research can also be used in future research, where they can be improved in order to repeat the research and assess all of 2020 and the entire sector of civil society organisations working in contemporary culture and arts. The questionnaire can also be used and adapted to a wider scope within the cultural sector in order to collect comprehensive data on the impact of the COVID-19 pandemic and the Zagreb earthquake on the cultural and creative sector in the Republic of Croatia, which would allow decisions to be conceived and made to improve the cultural policy framework for the entire cultural sector. In order to secure comprehensive insights into various levels of impact on civil society organisations working in contemporary culture and arts, however, it will also be necessary to design and implement other quality measures which will, in combination with quantitative methods, and the monitoring and repeated measuring of the impact of the crisis, enable the implementation of longitudinal research that will monitor the impact of the COVID-19 pandemic and the Zagreb earthquake on civil society organisations working in contemporary culture and arts, end to end.

3 | Joint statement *A Cultural Deal for Europe. A Central Place for Culture in the EU's Post-Pandemic Future* published by Culture Action Europe, European Cultural Foundation and Europa Nostra. Available at: <https://bit.ly/3aPKO4t> [November 27, 2020].

## References

Asturić, M. (2017) *Art radionica Lazareti (ARL): Inovativne prakse umjetničkog djelovanja*. Graduation thesis. Split: Faculty of Humanities, University of Split.

Barada, V., Primorac, J. and Buršić, E. (2016) *Osvajanje prostora rada. Uvjeti rada organizacija civilnog društva na području suvremene kulture i umjetnosti*. Zagreb: Kultura Nova Foundation.

Buršić, E. (2014) *Mreža Clubture: mapiranje organizacija izvaninstitucionalne kulture. Istraživački izvještaj*. Zagreb: Alliance Clubture/Clubture Network.

European Commission (2018) *Communication from the Commission to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the Regions. A New European Agenda for Culture*. Brussels: European Commission.  
Available at: <https://bit.ly/36ghZv6> [October 1, 2020].

Kardov, K. and Pavić, I. (2007) "Clubture: Profil organizacija i suradničke prakse". In: Vidović, D. (ed.) *Clubture: Kultura kao proces razmjene 2002.–2007*. Zagreb: Clubture. pp. 79-105.

Kantur, D. and Iseri-Say, A. (2015) "Measuring organizational resilience: a scale development". In: *Journal of Business, Economics and Finance*, 4 (3). pp. 456-472.

Pasikowska-Schnass, M. (2020) *EU support for artists and the cultural and creative sector during the coronavirus crisis*. European Parliamentary Research Service. May 2020.  
Available at: <https://bit.ly/3pKjEQS> [October 1, 2020].

Maxwell, R. and Miller, T. (2018) "Greening cultural policy". In: Kangas, A., Duxbury, N. and De Beukelaer, Ch. (ed.) *Cultural Policies for Sustainable Development*. London and New York: Routledge, Taylor & Francis Group. pp. 46-57.

Montalto, V. et al. (2020) *European Cultural and Creative Cities in COVID-19 times. Jobs at risk and the policy response*. European Commission, JRC Science for Policy Report. Luxembourg: Publications Office of the European Union.  
Available at: <https://bit.ly/3hJfhmu> [October 1, 2020].

Obuljen, N. and Žuvela Bušnja, A. (2008) "Civilno društvo i proces donošenja odluka u hrvatskoj kulturnoj politici". In: Peruško, Z. (ed.) *Kultura, mediji i civilno društvo*. Zagreb: Croatian Sociological Association and Naklada Jesenski i Turk. pp. 107-125.

Tonković, Ž. and Sekelj, S. (2016) "Godišnje izložbe Soros centra za suvremenu umjetnost Zagreb kao mjesto umrežavanja – Annual exhibitions of the Soros Centre for Contemporary Art Zagreb as a place of networking". In: *Život umjetnosti: časopis o modernoj i suvremenoj umjetnosti i arhitekturi*, Vol. 99, no. 2, 2016. pp. 80-95.

Švob-Đokić, N., Primorac, J. and Jurlin, K. (2008) *Kultura zaborava – industrijalizacija kulturnih djelatnosti*. Zagreb: Croatian Sociological Association and Naklada Jesenski i Turk.

Švob-Dokić, N. (ed.) (2010) *Kultura/Multikultura*.  
Zagreb: Naklada Jesenski i Turk.

UNESCO and WB (2018) *Culture in City Reconstruction and Recovery. Position Paper*. Paris and Washington:  
UNESCO and the World Bank.

Available at: <https://bit.ly/3rUMz6S> [October 1, 2020].

Vidović, D. (2012) *Razvoj novonastajućih kultura u gradu Zagrebu od 1990. do 2010*. PHD thesis.  
Zagreb: University of Zagreb, Faculty of Humanities.

Vidović, D. (ed.) (2018) *Do It Together. Practices and Tendencies of Participatory Governance in Culture in the Republic of Croatia*. Zagreb: Kultura Nova Foundation.

## Impressum

### TITLE

Impact of COVID-19 and Zagreb earthquake on CSOs in Contemporary Culture and Arts

Results of the test phase of the research

### EDITION

Kultura nova

### PUBLISHER

Kultura Nova Foundation

### FOR THE PUBLISHER

Dea Vidović

### AUTHORS

Dr Krešimir Krolo  
Dr Željka Tonković  
Dr Dea Vidović  
Dr Ana Žuvela

### EDITOR

Dea Vidović

### EXECUTIVE EDITOR

Tamara Zamelli

### DESIGN AND LAYOUT

Filburg

### TRANSLATION TO ENGLISH

Miljenka Buljević

### PROOFREADING

Proof-Reading-Service.com

### RESEARCH WAS IMPLEMENTED BY THE RESEARCH AND DEVELOPMENT DEPARTMENT OF THE KULTURA NOVA FOUNDATION

Tamara Zamelli

Antonija Letinić

Marta Jalšovec – RESEARCH COORDINATOR

### FONT

Inter

IBM Plex Serif

ISBN 978-953-8224-02-7

Zagreb, January 2021

Kultura Nova Foundation, Gajeva 2/6  
10 000 Zagreb, Croatia

This work is disposed under the Appointment Share Creative Commons License under the same conditions as 3.0 Croatia if not otherwise specified. The content can be freely copied, transferred and edited with the obligatory clear pointing out of the name of the author and source of the article and under the condition that you do not protect it with a separate copyright. You may find the license at <https://bit.ly/3pMXVYB>

### THIS PUBLICATION IS AVAILABLE FOR DOWNLOAD AT

↓ <https://kulturanova.hr/>



