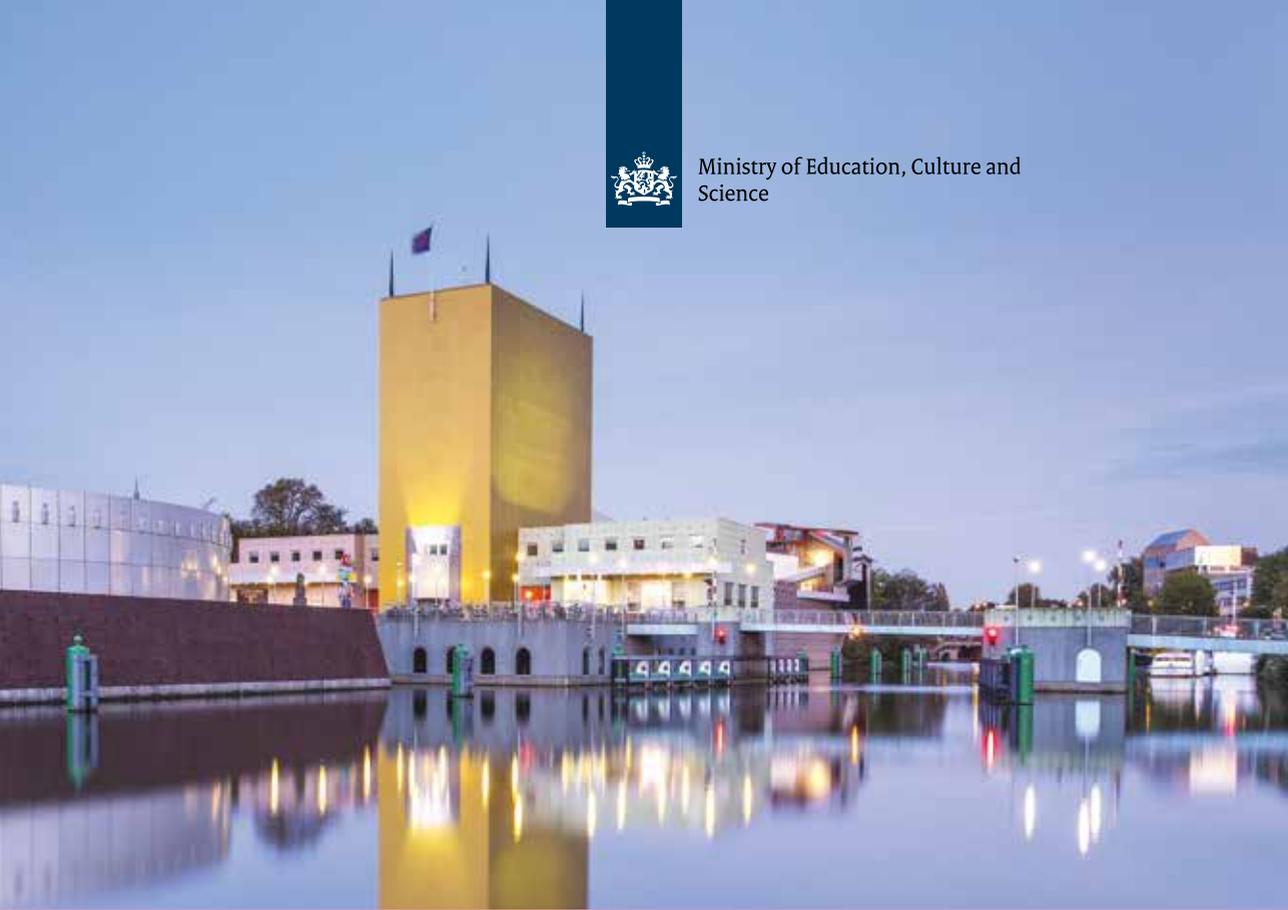




Ministry of Education, Culture and
Science



**[CULTURE AT A : : 2016
FIRST GLANCE : :]**

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[1 : Introduction]

Culture at a first Glance is published by the Dutch Ministry of Education, Culture and Science. Its intention is to provide an overview of cultural policy in the Netherlands and of major trends in the cultural and creative sector.

Section 2 of this publication provides background information on the Netherlands and discusses recent trends in such areas as demographics, urban development, and the structure of public administration. Section 3 explains the country's cultural policy and deals with its current priorities. Section 4 looks at current trends in the culture sector. Among the matters dealt with are the development of supply and demand in the sector, engagement in the arts, and cultural education.

Some of the statistical information in this section has been provided by Statistics Netherlands (CBS; www.cbs.nl), the Netherlands Institute for Social Research (SCP; www.scp.nl), and the Netherlands Bureau for Economic Policy Analysis (CPB; www.cpb.nl). A database has also been used that gives details of institutions receiving long-term funding. The database was developed by the Dutch government in association with the national cultural funds and the "G9" cities (Amsterdam, Arnhem, Eindhoven, Enschede, Groningen, Maastricht, Rotterdam, The Hague, and Utrecht).

More detailed information (sources, websites, literature) can be found at:

- Culture at a Glance 2014
(<https://www.government.nl/documents/reports/2014/04/14/culture-at-a-glance>)
- Compendium/Cultural policies and trends in Europe
(<http://www.culturalpolicies.net/web/netherlands.php>)
- Cultuur in Beeld 2015 (in Dutch only)
(<https://www.rijksoverheid.nl/documenten/rapporten/2015/11/12/cultuur-in-beeld-2015>)

The Director-General for Culture and Media
Marjan Hammersma

March 2016



[2 : General outline]

2.1 : Geography and language

The Kingdom of the Netherlands comprises of four countries: the Netherlands itself (which includes the Caribbean islands of Bonaire, St Eustatius, and Saba), Aruba, Curaçao, and Sint Maarten (all in the Caribbean). This document deals with the situation in the continental Netherlands (i.e. the European Netherlands). With an area of 41,526 sq. km and a population density of 500 per sq. km, the Netherlands is one of the smaller and most densely populated countries in Europe.

About half the area of the country is below sea and river level, making effective water management vital. More than twenty percent of the land has been reclaimed from the sea, a feature for which the Netherlands is known all over the world. Many tourists are attracted by the country's unusual landscape and its rich cultural heritage.

Some 25 million people speak Dutch as their mother tongue or official language in the Netherlands itself, Aruba, Bonaire and Curaçao, the former Dutch colony of Surinam, and the Flemish Community of Belgium. A variety of regional languages and dialects are also spoken in addition to or instead of Dutch.

Frisian has a special status, recognised as the second official language of the Netherlands. More than 400,000 people speak it in their everyday lives, with most of them living in the northern province of Friesland. Owing to the influx of other nationalities, over a hundred languages are now spoken in the Netherlands.

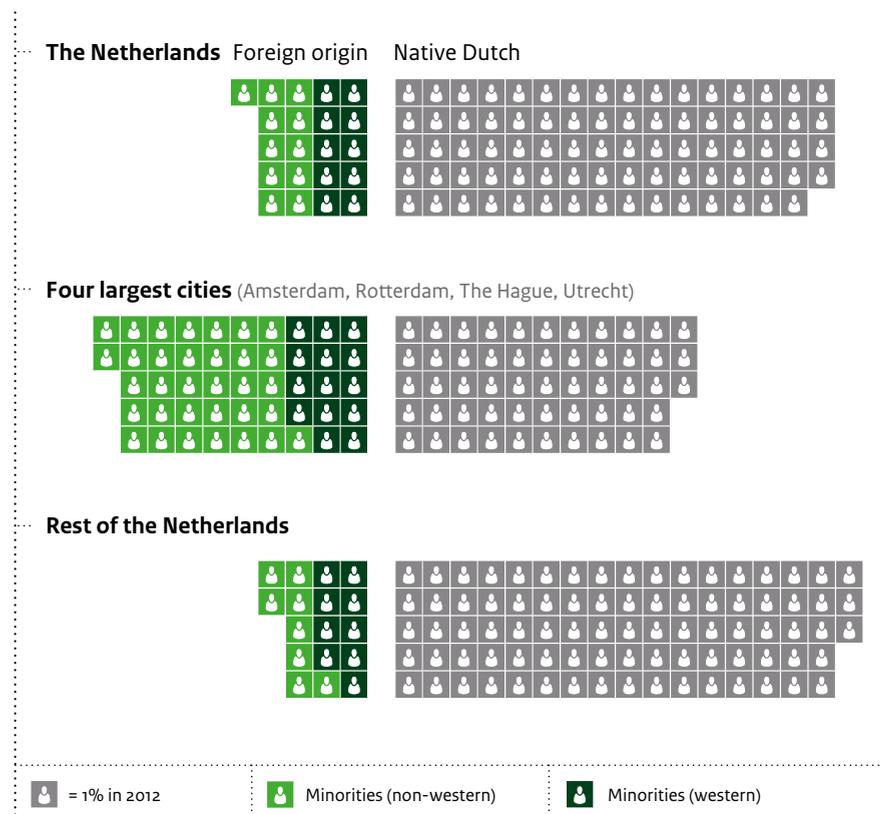
2.2 : Population and demographics

At the end of 2015 the Netherlands had a population of almost 17 million. The population is ageing, with about 15.6% being aged over sixty-five. It is estimated that by 2040 the number of over-sixty-fives will be 4.6 million, out of an estimated total population of 18 million.

Like many other countries in Western Europe, the Netherlands is an "immigration country". This trend began shortly after the Second World War, with a wave of immigrants from the former Dutch East Indies (now Indonesia). In the past thirty years, the number of nationalities has increased considerably, with Turkey and Morocco as the main countries of origin. In the 1960s, Dutch companies that were having trouble filling vacancies recruited Turkish and Moroccan workers.

After Surinam became independent in 1975, a large number of Surinamese who had Dutch nationality decided to take up residence in the Netherlands. The past thirty years have seen an influx of asylum seekers from various parts of Africa and Asia, as well as Europe.

Figure 2.1 : Proportion of Dutch residents of foreign origin



Source: PBL, 2014

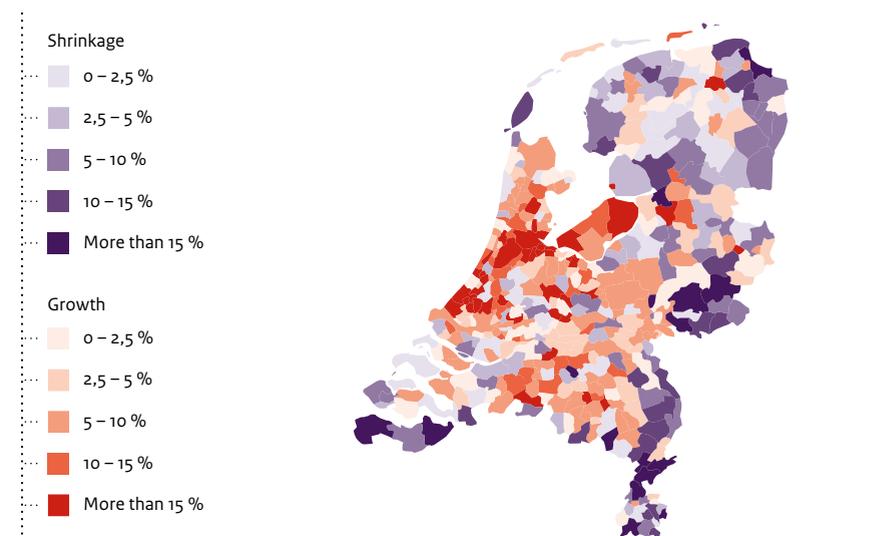
In 1960 there were fewer than 120,000 foreigners living in the Netherlands; fifteen years later their numbers had risen to 320,000. Official figures put the foreign population in 2008 at more than 3 million (or about 19% of the total population) and in 2015 at 3.67 million. At the end of 2015, one in eight people in the Netherlands was of non-western origin.

From 1900 to 2015, the Dutch population grew by more than 11 million. In 1900 it was 5.1 million, in 1950 10 million, in 1970 13 million, and in 2015 16.9 million. The period from 1970 to 2000 saw a decline in the populations of the major cities, with many people settling on the outskirts of the urban conurbations or a short distance away, resulting in the growth of dormitory towns. This trend was encouraged by government policy, which aimed to spread out the population and separate the areas where people lived from the areas where they worked. The concept of the “compact city” was developed in the eighties. Cities were once again considered attractive places to live – and cultural incubators. Most of the Netherlands would qualify as urbanised: it has a highly developed regional infrastructure. Public services are well structured and distances are short.

2.3 : The role of the city

There is major population growth in the big cities of the “Randstad” (the large conurbation in the west of the country), but also in Groningen, Nijmegen, and Eindhoven. In other areas, such as East Groningen, South Limburg and Zeeuws-Vlaanderen, the population is shrinking.

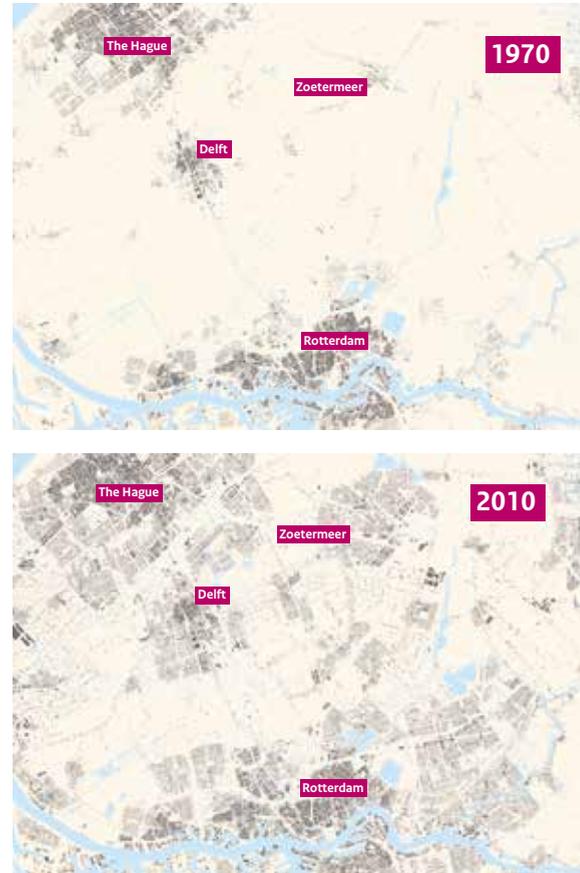
Figure 2.2 : Forecast growth and shrinkage areas of the Netherlands 2012-2040



Source: PBL, 2014

Compared to Germany or France, for example, the distinction between town and country in the Netherlands is much less clear. The country is highly urbanised: figures provided by the Netherlands Environmental Assessment Agency (PBL) show that 52 percent of its area can be classed as urban. Movement to the cities is expected to continue in the coming decades. Towns and villages are growing towards one another, leading in some regions to areas of continuous building, such as the Rotterdam-The Hague region (see Figure 2.3).

Figure 2.3 : From city to urban region



Source: PBL, 2014

Residents of cities are on average younger, more diverse in terms of their background, and better educated than residents of other areas. In the Netherlands, almost 30 percent of people aged 15 to 75 have been through higher education (research university or university of applied sciences). That figure is higher in highly urbanised municipalities. Nationally, the proportion of people of foreign origin is 21 percent. In urban regions, and certainly in the big cities, that percentage is significantly higher. In Amsterdam and The Hague, there are currently more members of minorities than native Dutch people. Most elderly people (in absolute numbers) live in cities, and above all in the Randstad. Relatively speaking, however, the proportion of elderly people is greatest in rural areas.

2.4 : Organisation of government

The Netherlands has been a constitutional monarchy since 1815. The symbol of national unity is the Royal Family, the House of Orange. Although Amsterdam has been the nation's capital since the French era (1795-1813), The Hague has traditionally been the seat of government since the Middle Ages.

The Netherlands is a parliamentary democracy based on proportional representation, with a bicameral Parliament (the States General). The Upper House [*Eerste Kamer*] has 75 members; these are elected by the members of the Provincial Councils, making it an indirectly elected regional chamber. The Lower House [*Tweede Kamer*] has 150 members, elected directly in general elections. Universal suffrage for men was introduced in 1917, with women receiving the vote in 1919. Since 1978, all Dutch nationals over the age of eighteen have had the vote. Elections to the Lower House, the Provincial Councils, the municipal councils and, more recently, the European Parliament are usually held every four years. Under certain conditions, foreign residents also have the right to vote in municipal elections.

Although the Netherlands is a unitary state and not a federation, its government has traditionally been decentralised. There are twelve provinces and 390 municipalities (as of 1 January 2016). Each province is governed by a Provincial Council, which elects an executive committee, the Provincial Executive. The Provincial Executive is responsible for drafting and implementing Provincial Council decrees and bylaws, and for implementing any central government decrees delegated to the provinces. The Provincial Council and Provincial Executive are chaired by the crown-appointed King's Commissioner. The provinces receive central government funding from the Provinces Fund [*Provinciefonds*], and the municipalities from the Municipalities Fund [*Gemeentefonds*], based on population size and criteria such as the social and cultural composition of the population. Provinces and municipalities, in particular the four major cities of Amsterdam, Rotterdam, Utrecht and The Hague, enter into separate administrative agreements with central government on certain matters. With a few exceptions, the provinces and municipalities are autonomous when it comes to spending.

Each municipality is run by a municipal council chaired by a crown-appointed Mayor. The Mayor and Executive Councillors form the municipal executive. Funding from the Municipalities Fund is used to pay for cultural and recreational amenities, such as theatres, sports fields, and swimming pools. The Grants to Municipal Authorities Act [*Financiële verhoudingswet*] lays down how funding is allocated to the various tiers of government. Municipalities are regarded as an essential part of democratic government. Municipal councils are responsible for implementing policies in clearly defined areas, for example housing, public green space, the registry office, streets, swimming pools, and sports fields. In recent years, a number of tasks of central government have been decentralised. In 2015, for example, the municipalities became responsible for providing care for chronically ill persons and the elderly, assisting people to find work (or providing benefit), and youth care.

In the context of cultural cooperation, there is cooperation with other authorities in various constructions, for example with the four largest cities, the “G4”: Amsterdam, Utrecht, The Hague, and Rotterdam. There is also cooperation with the country’s nine main cultural centres, the “G9” cities of Amsterdam, Arnhem, Eindhoven, Enschede, Groningen, Maastricht, Rotterdam, The Hague, and Utrecht. The 35 largest municipalities also work together in the “G35” association.

2.5 : Politics and society

For a long time, politics in the Netherlands was dominated by three main ideologies: Christian (denominational), social democratic, and liberal. None of the various political parties that represent them ever succeeded in winning an absolute majority in a general election in the twentieth century.

They were therefore obliged to enter into ever-changing coalitions with one another. Each ideology had its own political parties, educational institutions and socio-economic organisations, forming confederacies referred to as “pillars”. In this “pillarised” society, Socialists, Catholics, Protestants and – to a lesser extent – liberals lived in worlds that were largely separate from one another. Each pillar had its own newspapers, magazines, broadcasting organisations, trade associations, youth clubs, sports clubs, and leisure clubs. Many people’s religious and political preferences coincided. One exception was the relatively small moderate-minded, freethinking section of the population, who had no desire to set up a pillar of their own.

The pillars and civil society organisations co-existed, forcing their political leaders to consult and negotiate continuously so as to ensure that the country remained governable. The result was a tradition of consensus, with civil-society organisations being consulted before political decisions were taken – the Dutch “polder model”. Consultation involved not only the denominational organisations but also increasingly the employers’ associations and trade unions in the various sectors of the economy. All this reflects the desire to involve as many of those directly concerned as possible in every decision, complementing proportional representation in the political sphere.

In the mid-sixties, the pillars went into rapid decline. Fewer and fewer people found themselves able to identify with a denominational grouping and they were beginning to seek information, entertainment, and leisure activities outside their traditional circles. This trend was reflected in the political arena: from the sixties on, many new political parties were founded. The three traditional ideologies still dominate, but there are parties on the edges of the spectrum that focus explicitly on topics such as law and order, integration and ethnic minorities, administrative reform, and even animal welfare.

Another factor was secularisation. Whereas in 1955 80% of the population belonged to a religious denomination, by 2008 that figure had fallen to 42%, of which 19% were churchgoers. In 2014 50.8% of Dutch people considered themselves religious.

The present government (2012- ..) is a coalition of VVD (conservative liberal party) and PvdA (social democratic party). The Minister of Education, Culture and Science, Dr Jet Bussemaker is a member of the PvdA, while the State Secretary for Education, Culture and Science, Mr Sander Dekker, is a member of the VVD. As part of the portfolio for culture, Mr Dekker is responsible for the media.

2.6 : Economic and social trends

The Netherlands is a prosperous country with a stable economic climate. Economic growth stagnated in the eighties and between 2003 and 2005. The country was hit by the worldwide economic crisis that began in 2008, but for 2016 economic growth of 2.1% is predicted, with inflation at 0.9%.

Table 2.1 : Gross domestic product (GDP), average income, total population, potential labour force, and number of employed and unemployed, 2008-2016 (forecast)

	2008	2013	2014	2015	2016
(forecast)					
GDP (billion euros)	572	650.9	662.8	680.8	704.1
Average income per annum (euros)	32,500	34,500	34,500	35,500	36,000
Total population (x 1000 persons)	16,530	16,804	16,865	16,940	17,015
Workforce (x 1000 persons)	8,772	8,913	8,874	8,920	8,995
No. of unemployed					
(x 1000 persons)	327	708	709	685	660
As % of total potential workforce	(4.8%)	(8.9%)	(9.0%)	(8.7%)	(8.3%)

Source: Netherlands Bureau for Economic Policy Analysis (CPB) – April 2011/December 2015

Just under three-quarters of the workforce are employed in the trade and service sectors. The rise in the number of jobs in the service sector is typical of the shift towards a society in which knowledge has become by far the most important production factor. Post-war economic expansion made it possible to build a welfare state that actively provided services and facilities in such fields as education, health care, care for the poor and elderly, social security, media, the arts, and culture. To make this enormous density of services and facilities possible, the government assigned public powers and duties to private-sector bodies. A good example is public service broadcasting, in which private-sector organisations supply public broadcasting services within a state-regulated system. On the other hand, longstanding private organisations received funding because the services they provided were regarded as being in the public interest.

The post-war years saw not only the development of the welfare state but also radical changes in public morals. Choices which had been more or less imposed by the pillars made way for the pursuit of personal fulfilment and the desire to take personal responsibility. A predominantly submissive, quiet way of life was superseded by a more liberal lifestyle with new ideas about sexual relationships and commitment, including, for example, same-sex relationships and marriages. All this resulted in a high level of public and private tolerance of individual and group behaviour; indeed, tolerance became a *sine qua non* in the public arena. Pluralism also affected the arts, culture and media. Forms of culture hitherto regarded as trivial – for example pop music, and comic books – started to be taken seriously in cultural policy. Quality had to be judged on a case-by-case basis; there was no fixed canon any more or a straightforward classification into elite and popular culture.





[3 : Cultural policy]

3.1 : Historical perspective

The Minister of Education, Culture and Science is charged with “creating the conditions for maintaining and developing ‘expressions of culture’ and spreading them socially and geographically or otherwise”. The minister must be guided “by considerations of quality and diversity”. Historically, this role has been interpreted on the basis of three principles, which have occupied an important place in the development of Dutch cultural policy.

The first principle is that “the government is not a judge of art or science”. This is consistent with the liberal conviction that, in a democratic state, the arts and culture must be free in terms of content, with the government merely creating the conditions. It was only after the Second World War that the government began to play an active part in encouraging and funding cultural activities. In doing so, it expressly refrained – as a reaction against the mixing of political and artistic judgement during the Second World War – from making any artistic judgement of the arts and culture. The second principle is that the government has a part to play in maintaining culture. Since the end of the nineteenth century, the Netherlands has been working to gradually develop a cultural heritage policy for historic buildings, archaeology, museums, and archives. The third principle is the social and geographical spread of the arts and culture.

These three principles have been interpreted differently over time, depending on the political leanings of ministers and their time. Even today, they are the determining factor in government action in the policy area of culture and the arts.

3.2 : Division of roles in tiers of government in funding of culture

The model for public funding of the culture sector was constructed after the Second World War. The 1980s saw the creation of the system of funding by the government and larger municipalities on the basis of four-year Cultural Policy Documents. This system provides structure for the publicly funded culture sector. Together with the other tiers of government, central government is responsible for a high-quality cultural offering right across the country. The current culture system ensures stability, dynamism and innovation. The roles are divided among the various parties as follows:

- Central government directly supports a high-quality offering from institutions of national and international significance, also focusing on spread, cultural education in schools, and entrepreneurship. This is the so-called Basic Infrastructure for Culture (BIS).
- Municipalities support the local and regional offering, venues and museums, as well as supporting the national offering. This includes subsidising venues, libraries and music schools, and funding the management of municipal museums. Municipalities receive a contribution from the Municipalities Fund for this purpose. The provinces promote the diversity and spread of cultural amenities in their region, and are responsible for provincial collections and for spatial planning, with the associated heritage features.
- The 6 national cultural funds, which receive their budget from central government, have the task of promoting dynamism, innovation, and experimentation.
- The Council for Culture advises on the system and the individual institutions funded by the National government. It also provides strategic advice, both when requested and at its own initiative, on various matters of cultural policy. Its advice is generally provided at the request of the Minister of Culture.

Central government fulfils its role mainly by supporting a Basic Infrastructure for Culture (BIS), a group of institutions of national and international significance, and six national cultural funds.

3.3 : Government spending on culture

3.3.1 : Central government's culture budget for 2013-2016

The year 2010 saw the end of a long period of broad political support for culture. The first government led by Prime Minister Mark Rutte took office in that year. It was a minority government consisting of the parties VVD (Liberals) and CDA (Christian Democrats), with tacit support in the Lower House from the Party for Freedom (PVV) led by Geert Wilders. Partly because of the financial crisis, the government saw itself forced to make drastic cuts. With effect from 2013, central government has cut a total of EUR 200 million from the culture sector as a whole, i.e. over 21% of the culture budget. Of this, EUR 125 million was cut from spending on the Basic Infrastructure for Culture (BIS), including the budget of the national cultural funds.

The number of institutions directly funded by central government has decreased over the last two funding periods. During the period from 2009 to 2012, the national cultural funds were given a greater role, the key term being “steering at a distance” or “arms length principle”. A large number of institutions no longer included in the basic infrastructure are being funded by national cultural funds or other government bodies. During the current period (2013-2016), the Basic Infrastructure for Culture has been defined more strictly, further reducing it to a core of 83 institutions with a specific function and six cultural funds.

The institutions that currently form part of the basic infrastructure present a fairly stable picture. Central government was funding 83% of the institutions in the current basic infrastructure as long ago as 1997. This group of institutions is of national and international significance. The composition of the national cultural funds has been more dynamic.

In 2014, central government devoted a total of EUR 709 million to the culture sector. Of that, EUR 487 million went to the Basic Infrastructure for Culture (BIS). The institutions receiving four-year funding that make up the BIS received 333 million, with the remaining EUR 154 million going to the cultural funds. In addition to spending on the BIS, EUR 80 million was spent in 2014 on heritage conservation, EUR 10 million on cultural education, EUR 61 million on the National Archive and Regional Historical Centres, and 18 million on the library modernisation programme.

Funding for institutions

In the period from 2013 to 2016, 83 institutions are receiving multi-year structural funding in the context of the BIS. The funds are together providing 140 institutions with such long-term funding. In total, the national cultural funds are spending EUR 36.3 million on long-term funding. They also provide “one-off grants” (see Table 3.1).

Table 3.1 : Number of institutions receiving multi-year funding and amount of funding provided by the Ministry of Education, Culture and Science and the funds 2014

Name of funding body	Number	Funding (x 1 million)
Ministry of Education, Culture and Science	83	333,1
Cultural funds	140	36,3
• Film Fund	3	0,8
• Cultural Participation Fund	18	3,0
• Performing Arts Fund	82	26,6
• Literary Fund	8	1,2
• Mondriaan Fund	19	2,1
• Creative Industries Fund	10	2,5

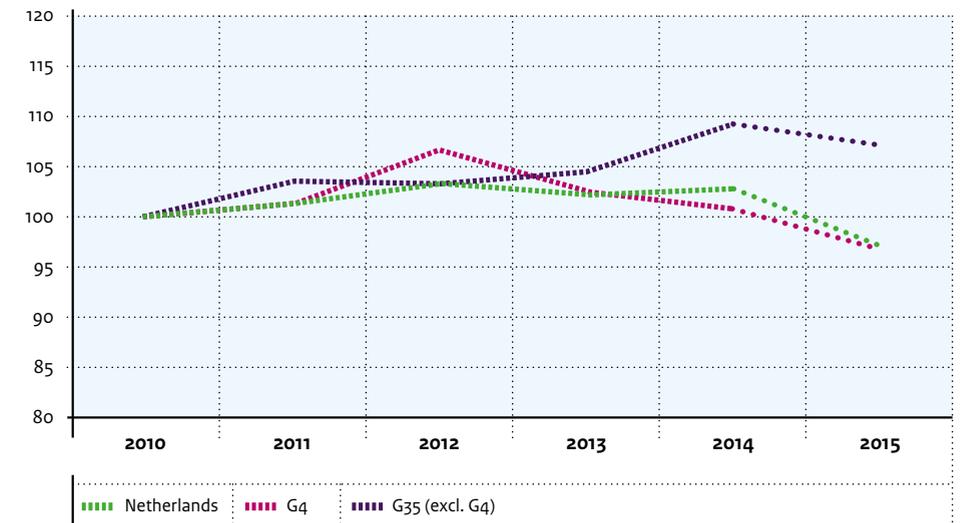
Source: Ministry of Education, Culture and Science database

3.3.2 : Municipal spending on culture

Most of the total cultural budget is provided by the Dutch municipalities. In 2015, the municipalities had a joint cultural budget of EUR 1,733 million. Municipal spending includes, for example, public library services, training and development, the arts, and archaeology/museums.

Figure 3.1 shows the trends in municipal spending on culture between 2010 and 2015 in index figures. These figures make it possible to compare the spending of different groups of municipalities. The figure shows that the spending of Dutch municipalities on culture rose by 3% between 2010 and 2014. Expenditure by the four largest cities (the G4) is in line with this trend. For the 35 largest municipalities in the country (the G35, excluding the G4), the pattern is different: between 2010 and 2014, their spending rose by 9%. There are major differences between the municipalities; some are investing in culture while others are making cuts. The trend between 2014 and 2015 is downward. Changes in the statistical methodology mean that it is not possible to determine whether expenditure by the municipalities is actually falling.

Figure 3.1 : Municipal budgets: spending on the arts and culture 2010-2015 (index figures 2010 = 100)



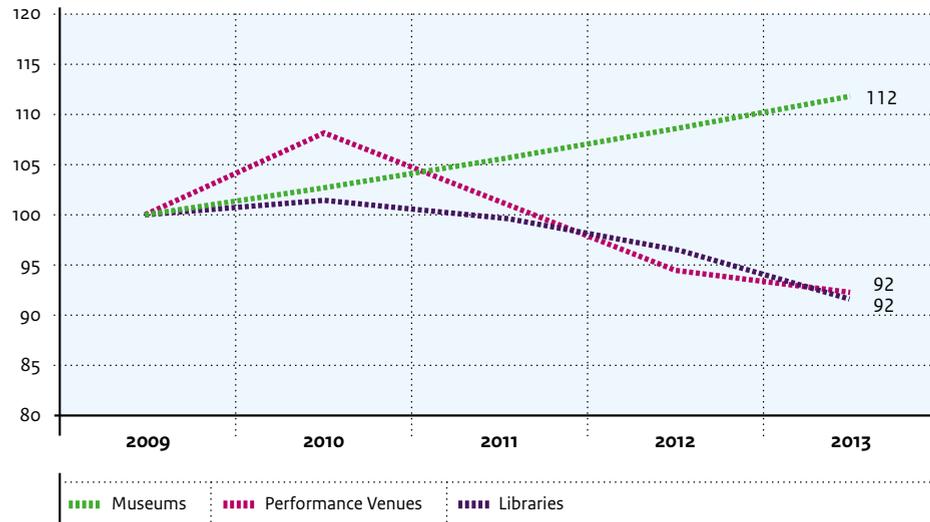
Source: Statistics Netherlands Statline, edited by Ministry of Education, Culture and Science

Less for performing arts venues and libraries; more for museums

Spending by municipalities at sector level shows a differentiated picture (see Figure 3.2). In 2013, municipal funding for performance venues totalled EUR 278 million. This refers to total funding including wage costs subsidies for performance venues that are members of the Netherlands Association of Theatres and Concert Halls (VSCD) and venues in the CBS's general register of companies with more than ten employees. Between 2009 and 2013, funding by Dutch municipalities for performance venues fell by 8%. The fall was greatest between 2010 and 2012.

In that same period, libraries also received 8% less municipal funding. In 2013, the total of municipal funding for libraries came to EUR 438.4 million. The fall in funding for libraries took place between 2010 and 2013. The pattern in municipal funding for museums is different. Total funding by municipalities for museums came in 2013 to EUR 202 million. That figure is 12% higher than in 2009.

Figure 3.2 : Trend in municipal funding for museums, performance venues, and libraries 2009-2013 (index figures 2009 = 100)



Source: CBS Statline, 2013

Publicly funded institutions in the G9

Table 3.2 shows the number of cultural institutions for which the G9 cities (Amsterdam, Arnhem, Eindhoven, Enschede, Groningen, Maastricht, Rotterdam, The Hague, and Utrecht) provide long-term funding, and the total amount of the funding. This information has been taken from the database of institutions in receipt of long-term funding. In 2014, the G9 cities together provided 528 institutions with long-term funding in the context of their cultural planning. The number of institutions that a municipality funds depends on various factors, including the size of the municipality, the composition of its population, and priorities within municipal policy.

The number of institutions receiving long-term funding varies between municipalities from 141 (Amsterdam) to 32 (Enschede). The total amount of funding varies from EUR 85.4 million (Rotterdam) to EUR 17.5 million (Arnhem and Groningen). The amounts in the following table do not comprise the total expenditure of municipalities on culture but only funding for institutions that receive long-term funding in the context of the municipality’s cultural planning.

Table 3.2 : Number of institutions receiving multi-year funding and amount of funding 2014

	Number of institutions	Funding (in millions of euros)
Amsterdam	141	82,1
The Hague	65	51,6
Rotterdam	77	85,4
Utrecht	66	36,1
G4	349	255,1
Arnhem	41	17,5
Eindhoven	36	20,5
Enschede	32	18,2
Groningen	34	17,5
Maastricht	36	18,3
G9	528	347,7

Source: Ministry of Education, Culture and Science database

3.3.3 : Impact of cuts on funded institutions

What has happened to the institutions that from 2013 no longer received any structural funding (from central government, a cultural fund, or the G4)? Have they ceased their activities or are they still active? A quick scan of formerly funded institutions was carried out by investigating on the internet whether they are still in fact active. Figure 3.3 summarises the findings of the investigation. The latest data point is January 2015. Institutions that ceased their activities after that point were not included in the investigation.



Figure 3.3 : Number of (former) structurally funded institutions



Source: Rebel & APE, 2015

3.4 : Cultural amenities: spread

The Netherlands has a dense cultural infrastructure. There are cultural amenities throughout the country, and the distances between them are short, relative to other countries. Moreover, cities and regions increasingly form a network structure, with nodes in the areas of housing, employment, and also cultural amenities. People's radius of action is also increasing. On average, they travel 21 kilometres on a cultural outing or to visit a historical sight. The distance varies between regions, ranging from 12 to 47 kilometres.



On average, people travel 21 kilometres on a cultural outing or to visit a historical site. The distance varies between regions, ranging from 12 to 47 kilometres.

The distance that people travel to visit a cultural amenity depends, amongst other things, on what is available within their own municipality. It also depends on whether they live in an urbanised area. In Rijswijk, a small town near the Hague, for example, it is not only the cultural amenities within the municipality itself that are accessible but also the museums and performance venues of The Hague, which are not far away.

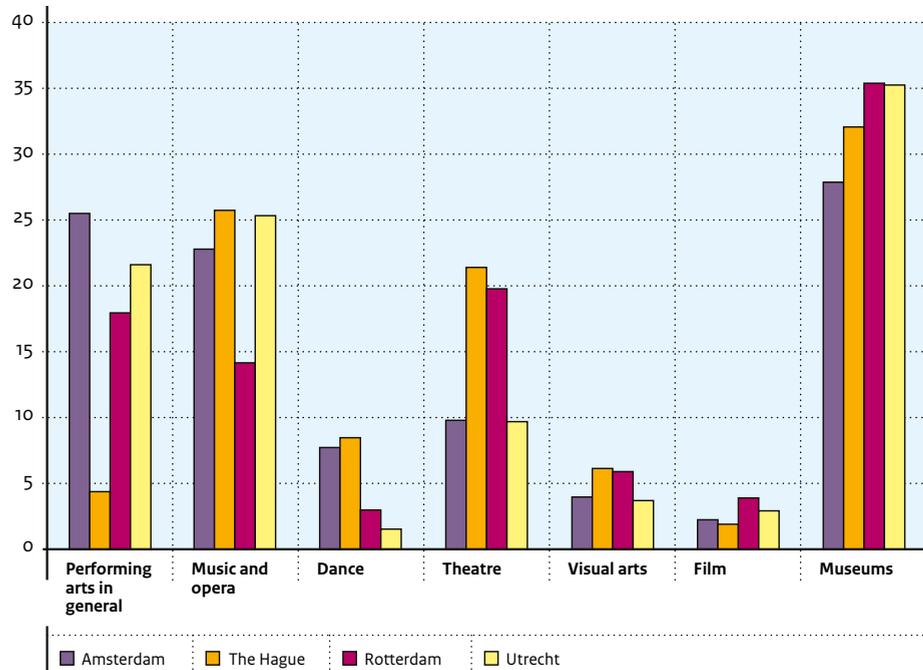
On average, someone in the Netherlands lives 2 kilometres from the nearest library. The average distance to the nearest museum is somewhat greater, namely 4.1 kilometres. The density of venues for the performing arts is lower than that of museums and libraries, with the average distance being 7.5 kilometres. This indicates that these venues have a regional function more frequently than museums and libraries. The same applies to mainstream and art house cinemas. The distance to these cultural amenities is greatest, at an average of 9.3 kilometres. The distance that people have to travel affects their cultural participation, but it is not a barrier for those who are interested in culture. The frequency of their visits is related to the distance to the amenity concerned: the more amenities there are nearby, the more frequently someone visits them.



Difference in focus for each discipline

Figure 3.4 shows how the G4 allocate their arts plan funding budget to the various sectors and reveals something of each city's funding profile. In all four municipalities, museums receive a substantial part of the budget. Amsterdam spends a relatively large part of its funding budget on the performing arts in general and on music. The Hague spends the most on dance in relative terms. The funding provided by the municipality of Utrecht is rather more evenly spread across the disciplines. Rotterdam spends the most on museums in relative terms.

Figure 3.4 : Distribution of municipal funding by sector (%) in the G4



Source: Ministry of Education, Culture and Science database; Culture at a Glance 2014

3.5 : Priority areas for the Dutch government

The Minister of Education, Culture and Science, Dr Jet Bussemaker, emphasises the breadth of meaning in the word “culture” and describes the balance between the artistic, societal, and economic value of culture in the policy memorandum *Cultuur beweegt, de betekenis van cultuur in een veranderende samenleving* [Culture Moves, the Meaning of Culture in a Changing Society] (2013).

Minister Bussemaker regards culture as part of a social agenda. The government is therefore encouraging the forging of links between culture and other sectors. Relationships with spatial planning, environmental law, nature conservation, and education have long been the subject of attention. The current government is also bringing relationships with healthcare, welfare, and sport into the spotlight. *Cultuur verbindt, een ruime blik op cultuurbeleid* [Culture unites, a broad view of cultural policy], Parliamentary Document Number 32820, No. 110 (July 2014). That memorandum is based on examples of the relationship between culture and sport, healthcare, and social issues.

Cultural institutions represent a public interest, given that they are at the heart of society. Museums, for example, are being encouraged to gain the interest of a new public who are unfamiliar with culture because of social and cultural conditions or physical limitations. The museums are being encouraged to collaborate with partners outside the heritage sector.

Besides this, Minister Bussemaker specifies priority areas: cultural education and participation in cultural life, talent development, the creative industries, and digitisation.

3.5.1 : Cultural education and participation in cultural life

Accessibility is a driving factor in cultural policy. The Dutch government considers it important that all children should come into contact with culture. The “Cultural Education with Quality” programme is an attempt by central government, the provinces and the municipalities, working together, to achieve high-quality cultural education within the primary school curriculum. Secondary school students can use the Culture Pass, a card with EUR 15 credit on it which they can spend on cultural activities. To encourage cultural participation, the government is supporting national networks and knowledge-sharing through the National Expertise Institute for Cultural Education and Amateur Arts [*Landelijk Kennisinstituut Cultuureducatie en Amateurkunst*] (LKCA) and experimentation through the Cultural Participation Fund. The formal agreement on “Older People and Culture” promotes cultural participation among older people. The coalition agreement states that all publicly funded institutions must apply the Cultural Diversity Code.



3.5.2 : Talent development

Central government has an important role to play in talent development in the culture sector. That role begins with a broad foundation of cultural education at primary and secondary schools. Those wishing to pursue a professional career in the culture sector generally follow the path of vocational secondary school (for example to train as a lighting or sound engineer) or higher professional arts education (for example to train as a dancer, filmmaker, or designer). The cultural funds are crucial to post-graduate talent development. They administer a broad range of schemes and measures to encourage novice and established artists and culture-makers. They are receiving additional funding in 2013-2016 to promote talent. For those who have already established themselves in their field, there are also Master's programmes in the arts and post-graduate institutions such as the National Academy of Fine Arts (RABK) in Amsterdam and the Jan van Eyck Academy in Maastricht. Starting in 2013, the large performing arts centres that are included in the Basic Infrastructure, the country's orchestras, and dance, opera and theatre companies will play a bigger role in talent development, similar to the part large companies play in the business sector.

The government considers it important to give talent enough scope to develop. For the period 2014-2016, EUR 5 million has been set aside for providing tailored support for new talent. A further EUR 3 million will also be made available on a once-only basis for low-interest loans for artists and designers.

3.5.3 : The creative industries

Creativity and innovation are essential for the growth of our knowledge society. The creative industries are excellently placed to link these ingredients to new technology and innovation, and to design new applications that are valuable in such areas as healthcare, infrastructure or the automotive industry. They thus contribute to the cultural enrichment and economic growth of our country, and also to resolving social issues. In order to exploit the power of the creative industry to our advantage, we need to get the education sector, knowledge institutions and the authorities working with the creative sector. As part of its business policy, the Dutch government has identified the creative industries as one of the Netherlands' key economic sectors. The aim is for that sector to turn the Netherlands into the most creative economy of Europe by 2020. Three agendas have been laid down for that purpose: a research agenda, an education agenda for coordinating training courses with the labour market, and an internationalisation agenda to exploit export potential. More information about the creative industries and the relevant policies can be found at creatieveindustrieinbeeld.nl/en (in English).

3.5.4 : Digitisation

Government policy is focusing on the creation, sustainable management and accessibility of digital collections, and on strengthening networks and digital skills. Over the past fifteen years, there has been substantial investment in creating the digital collection, with programmes such as "Images for the Future" and "The Memory of the Netherlands". In order to encourage use of our digital cultural heritage and other collections, archives, libraries, museums, and other institutions will be required to collaborate more closely on the development of a common infrastructure, at both national and European level. The Ministry of Education, Culture and Science is encouraging collaboration between cultural sectors and with users of digital heritage such as the education sector, research, tourism, and the creative industries. The development of new competencies is the focus of attention in the policy on digital literacy, media literacy, reading promotion schemes, and cultural education. Government departments and cultural funds are working to improve the provision of digital services to the public, businesses, and institutions. This is in line with the ambitions set out in the government-wide "Digital Government 2017" programme.

3.5.5 : Entrepreneurship

The present government also appreciates the economic significance of culture. As a result of both economic trends and changing political values, the government is encouraging entrepreneurial attitudes at cultural institutions. Institutions that receive public funding must generate a minimum level of their own revenue. The Cultural Entrepreneurship Programme introduced by the first Rutte government is being continued for the period 2013-2016. Its priority areas are to extend knowledge of culture among potential and existing private funders, to increase the private sector's willingness to give and to invest, and to broaden the funding mix of institutions in the basic infrastructure. The government is raising awareness of the options for making gifts through the communication strategy "*Cultuur, daar geef je om*" [Culture, that's what you care about]. The introduction of the Cultural Donations Act [*Geefwet*] in 2011 made it financially more attractive for individuals to make gifts. The entrepreneurship of cultural institutions is being given a boost with training courses, the dissemination of knowledge, and a leadership programme for promising managers in the sector.

3.5.6 : Internationalisation, regionalisation and urbanisation

It is in the country's cities that the most prominent museums, performing arts venues, festivals, and heritage sites are concentrated, and it is these that attract tourists both Dutch and foreign. For many people, however, culture is something in their immediate environment, whether that is a city neighbourhood or a village. Some cultural activities and amenities derive their identity and appeal (including internationally) precisely from the fact that they are less centrally situated. Demographic trends also influence the demand for and range of available cultural amenities.

Urban development and shrinkage create challenges for the culture sector. One important issue to be faced in future cultural policy is therefore how local and national cultural amenities and institutions should deal with these trends and how the authorities should respond.

Urban regions are developing their own cultural profile. This is apparent, for example, in the creative industries. The Netherlands has geographical clusters of activity, for example, in the fields of media and entertainment, fashion, and smart design solutions. A key challenge for the future is how regions can work together to create an offer and infrastructure with which they complement one another.

The government is implementing its decentralisation policy by funding cultural amenities spread across the western, northern, eastern, southern and central regions, and in the cities of Amsterdam, Rotterdam and The Hague. Coordination between central government, provinces, and municipalities has been laid down in the General Framework for Intergovernmental Relations in Respect of Culture. In the near future, the focus will be on intensifying cooperation between central government and other levels of government, in particular the nine main cultural centres (Amsterdam, Arnhem, Eindhoven, Enschede, Groningen, Maastricht, Rotterdam, The Hague, and Utrecht).

In order to position the Netherlands and Dutch artists internationally, the government is supporting international top institutions and strengthening the position of Dutch artists and institutions around the world. Commercial interests and international relations are also strengthened by culture.

3.6 : Funding system

In June 2015, Minister Bussemaker outlined her ambitions for the funding period commencing in 2017 in the memorandum on the Culture System 2017-2020, "*Ruimte voor Cultuur*" [Space for Culture]. A stable core of government-funded institutions has been created over time. The target for the coming period is to continue to improve the quality of the cultural system and to give cultural institutions the scope to distinguish themselves. This will be achieved by improving cooperation between government bodies, simplifying the system, reducing administrative burdens on cultural institutions, and focusing more on the importance of culture to society. The minister has made EUR 18.6 million available for investment in the Basic Infrastructure for Culture. Part of this funding will go to e.g. talent development and festivals.

3.7 : The national cultural funds

Each of the six national cultural funds focuses on an individual sector or a policy theme. The funds are also governed by the above policy principles. The national cultural funds also regard it as an important task to encourage an entrepreneurial attitude in the culture sector and increased involvement by the rest of society. The way in which this is framed differs from fund to fund and has been geared to the specific cultural field which they support.

The *Creative Industries Fund* supports high-quality, innovative projects by designers, makers, and architects. The aim of many of these projects is to highlight or resolve current social issues. In addition, the fund itself initiates activities in this area, for example the biennial Hedy d'Ancona Prize for excellent healthcare projects.

The *Performing Arts Fund* supports all forms of the performing arts. In order to give the strongest possible boost to the connection between the arts and society, the Performing Arts Fund has made radical changes to the system for providing long-term funding. The old system of providing an operating grant has been replaced by an elaborate system of standard amounts per performance. The question of who the production is intended for has become more important.

The *Dutch Literary Fund* invests in writers and translators of works ranging from essays to high-quality children's books. It encourages, to a greater extent than previously, innovative digital projects, festivals and literary/educational institutions that increase visibility and public reach. The fund also promotes Dutch literature around the world.

Since 2013, the *Mondriaan Fund* for the visual arts and heritage has been asking each applicant, whether an artist or a museum, to submit a presentation plan that describes how the new work, exhibition, acquisition, etc. will be displayed to the public in an inspirational way. This is being done in the belief that an inspirational presentation will make the public feel more challenged and involved.

Since 2013, the *Netherlands Film Fund* has been using a system of film consultants who assess and select film plans to ensure transparency in the decision-making and assessment processes and to provide applicants with a clear contact point, expert advice, and, if desired, guidance. The Film Fund provides targeted application procedures for new and experienced makers in order to encourage the development of new talent and to give experienced talent the opportunity to grow. Part of the application dossier consists of a well thought-out cross-media marketing and distribution plan aimed at achieving the maximum possible public reach across a number of platforms.

The *Cultural Participation Fund* focuses on collaboration between cultural institutions and schools with the aim of raising the quality of cultural education at primary schools. The starting point is the educational needs of the schools, which ensures that cultural activities are included in the curriculum in the best way possible. Since 2013, the fund also has teamed up with private funds to explicitly focus attention on cultural participation by older people.

The funds regularly join forces. A major new joint activity commissioned by the Minister is a long-term programme to strengthen the relationship between the arts and other societal domains. Under the title “The Art of Impact”, the programme is intended to encourage and promote initiatives and to provide scope for existing and new ambitions inside and outside the arts. Artists, agents, and art institutions will be given scope to strengthen collaboration with other focus areas in society. Others, outside the culture sector, will be challenged to describe a way in which artists, agents and institutions can and do help to address issues which are urgent to them.

The funds also collaborate in the area of internationalisation. For example, 2011 saw the start of “Central de Cultura”, a 2-year programme aimed at initiating collaboration between Brazilian and Dutch cultural institutions. In 2016, when the Netherlands joins forces with Flanders to act as host country for the Frankfurt Book Fair, the funds will act jointly to programme the fringe events.

3.8 : Cultural heritage

Heritage Act

The Dutch Heritage Act [Erfgoedwet], which comes into force in 2016, stipulates how our heritage is dealt with, designates the responsible parties, and specifies how supervision is to be exercised. For the first time, there is now a single comprehensive piece of legislation covering Dutch museums and their holdings, historical sites, and archaeology both on land and under water. Together with the new Environment and Planning Act [Omgevingswet], the Heritage Act makes possible comprehensive protection of the country’s cultural heritage. The Environment and Planning Act is expected to come into force in 2018. Amongst other things, it combines 26 existing laws and hundreds of sets of regulations in the fields of construction, environment, water, spatial planning, and nature.

Conservation and management of Dutch heritage was until recently governed by various different laws and sets of regulations, each with its own specific definitions, procedures, and protection measures for movable, immovable, and archaeological heritage. This sectoral fragmentation of heritage legislation and the necessary changes in existing laws were the main reason for drawing up a single integrated Heritage Act. Superfluous rules have been cancelled and the responsibility for protection of cultural heritage is where possible assigned to the heritage sector itself. The basic idea is that the sector has sufficient knowledge, expertise, and commitment to implement the care of cultural heritage in actual practice.

Background to care of heritage sites

Dutch immovable heritage consists of almost 62,000 listed heritage sites. This includes 1500 archaeological sites, on land or underwater, of national importance and protected by the government. Acting on behalf of the Minister of Education, Culture and Science the Cultural Heritage Agency selects heritage sites to be protected. After they have been designated, national heritage sites are listed in the register of heritage sites. The Dutch government and local authorities provide financial support for the maintenance of heritage sites, in the form of grants, loans, and tax relief. Whether property owners are eligible for this kind of financial support depends on the type of heritage sites that they own. Grants or loans are available only if a site has been listed in the register.

Table 3.3 : Number of national heritage sites by type

	2008	2009	2010	2011	2012	2013	2014
• Public buildings	1.875	1.887	1.938	1.948	2.015	2.051	2.053
• Defensive structures	1.239	1.239	1.289	1.417	1.558	1.709	1.721
• Church buildings	4.146	4.148	4.165	4.170	4.170	4.172	4.184
• Items in or part of church buildings	192	192	192	192	192	192	190
• Buildings, houses	36.032	36.053	36.149	36.193	36.217	36.224	36.155
• Parts of buildings, houses	185	187	187	187	187	187	187
• Charitable institutions	453	453	455	455	455	455	459
• Agricultural buildings	7.499	7.504	7.522	7.525	7.528	7.529	7.526
• Mills	1.270	1.273	1.274	1.274	1.274	1.275	1.275
• Roads and waterways	1.055	1.067	1.074	1.075	1.086	1.087	1.078
• Hospitality institutions	210	210	210	210	210	210	210
• Castles	993	997	1.007	1.015	1.016	1.017	1.018
• Separate items not listed above	5.464	5.501	5.560	5.600	5.613	5.622	5.712
TOTAL	60.613	60.711	61.022	61.261	61.521	61.730	61.768

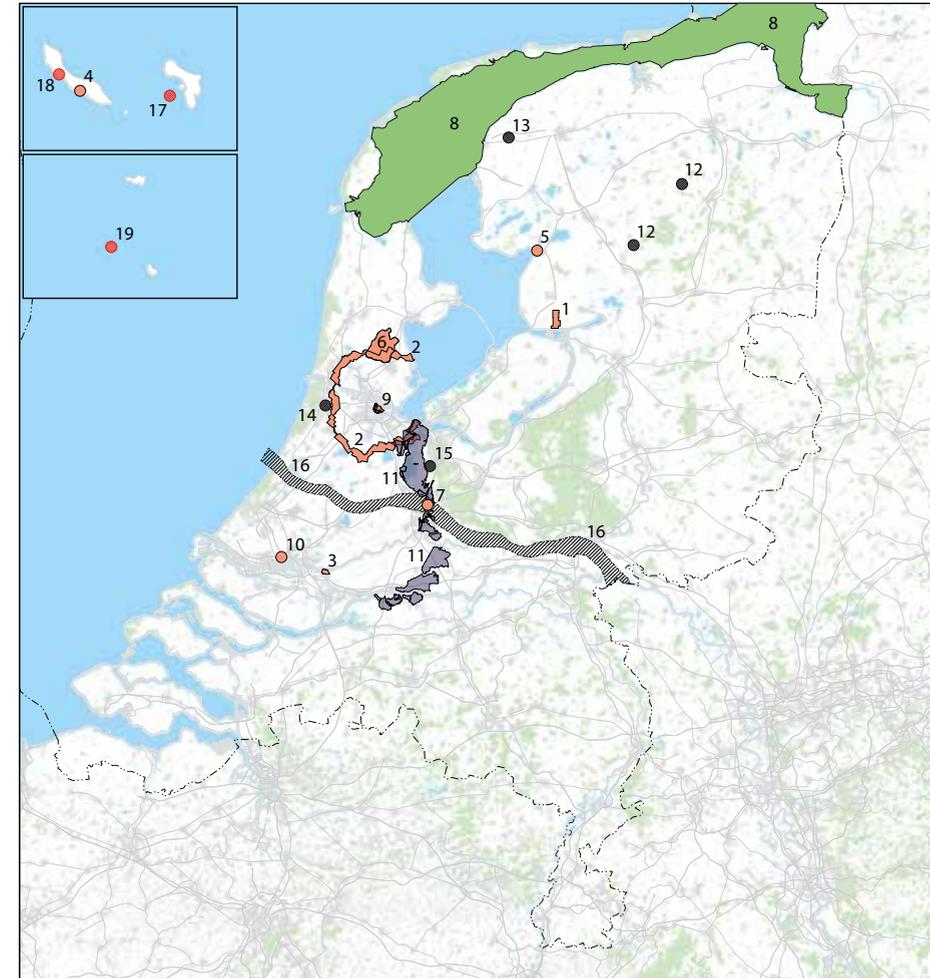
Source: RCE Erfgoedmonitor on the basis of register of heritage sites

National Restoration Fund

The National Restoration Fund [Nationaal Restauratiefonds] was founded at the initiative of the Ministry of Education, Culture and Science in 1985. It is an independent private foundation that operates within the statutes and policy framework of the Ministry and works closely with the Cultural Heritage Agency. Its goal is to promote the preservation and restoration of heritage sites and historic buildings in the Netherlands by being an essential partner for heritage site owners and contributing to safeguarding the cultural heritage of the country. To this end, the Restoration Fund offers Dutch heritage site owners and managers financial support and information regarding the restoration and maintenance of their buildings. It facilitates governmental organisations and other organisations through accessible finance and administrative service support, for example by providing subsidies and restoration loans through revolving funds. Currently the Restoration Fund manages approximately EUR 700 million in funds and pays out roughly EUR 90 million annually by way of grants.

The idea of a revolving fund is that an authority or other institution provides financial resources (temporarily). It is a self-sustaining financial mechanism and a sustainable investment strategy. The revolving fund of the National Restoration Fund is fed by additional fund contributions, interest instalments on loans, and other business revenues, including loan redemptions. The revolved money is used to assist other heritage site owners and to carry out additional restorations in the sector. Low-interest loans increase the financial feasibility of restoration and rehabilitation projects. It stimulates private investments and commitment, functions as a catalyst, and provides encouragement.

Figure 3.5 : UNESCO World Heritage Sites in the Netherlands



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|---|--|
| <p>World Heritage Sites</p> <ul style="list-style-type: none"> ● Cultural World Heritage Site; registered ● Cultural World Heritage Site; on provisional list <p>World Heritage areas</p> <ul style="list-style-type: none"> ■ Natural World Heritage Site ■ Cultural World Heritage Site; registered ■ Cultural World Heritage Site; on provisional list ▨ Cultural World Heritage Site; on provisional list, indicative area ● World Heritage Site; on provisional list, boundaries not yet determined | <p>Registered</p> <ol style="list-style-type: none"> 1. Schokland (1995) 2. Defence Line of Amsterdam (1996) 3. Mill network at Kinderdijk-Elshout (1997) 4. Willemstad (1997) 5. D.F. Wouda Steam Pumping Station (1998) 6. Beemster Polder (1999) 7. Rietveld Schröder House (2000) 8. Wadden Sea (2009/2014) 9. Canal Ring Area of Amsterdam (2010) 10. Van Nelle Factory (2014) <p>Provisional list</p> <ol style="list-style-type: none"> 11. New Dutch Waterline 12. "Colonies" of the Society of Benevolence 13. Eise Eisinga Planetarium 14. Teylers Museum 15. Zonnestraal Sanatorium 16. Limes/Frontiers of the Roman Empire (extension) 17. Bonaire Marine Park 18. West Curaçao plantations system 19. Island of Saba |
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Source: Unesco

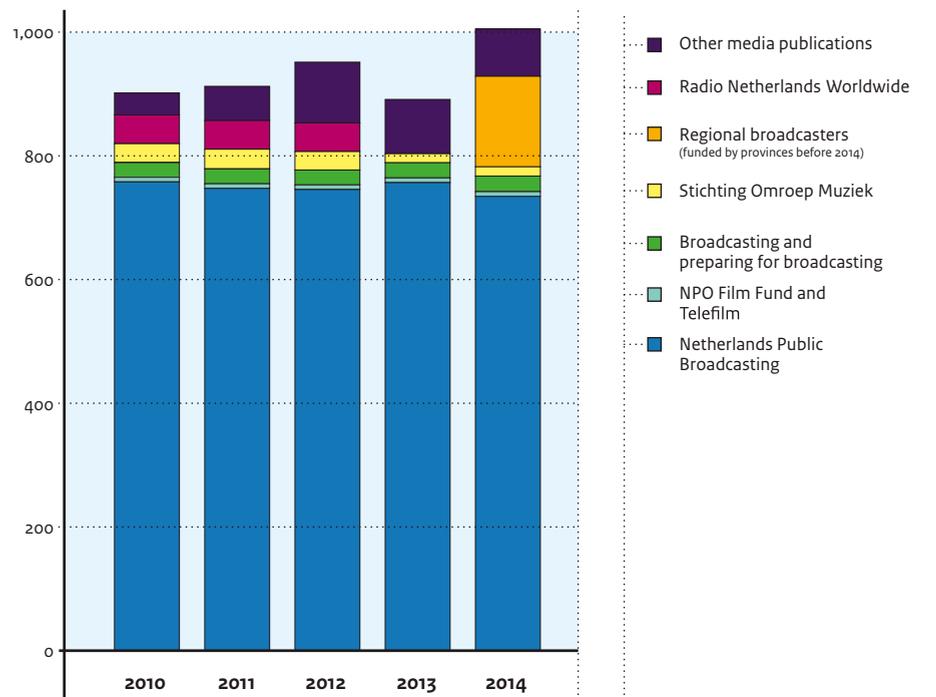
3.9 : Media policy

The Minister of Education, Culture and Science is responsible for the national, regional and local public broadcasting systems and for legislation governing this domain. In addition, the Minister bears responsibility for the funding of national public broadcasting and several other institutions in this field. The 2008 Media Act covers the responsibilities and tasks of the government with regard to public broadcasting, commercial broadcasting and the press.

The Dutch government recently reformed the public broadcasting system. Since 2016, public broadcasters have had a narrower remit. They are required to make informative and educational programmes, and programmes about the arts and culture.

Public broadcasters in the Netherlands are required to provide a varied range of programmes for every group in society. Public broadcasting organisations are allocated airtime, which they use for radio, television, internet, and mobile services. The Media Act requires public broadcasters to provide a varied range of programmes in the fields of information, culture and education. They are also responsible for providing a reliable news service. Their programmes must not be aimed only at a large audience. Smaller, specific target groups, such as art lovers, and other population groups should also feel catered for by the public broadcasting system.

Figure 3.6 : Government expenditure on media (in millions of Euros) (partially covered by advertising returns)



Source: CBS 2015



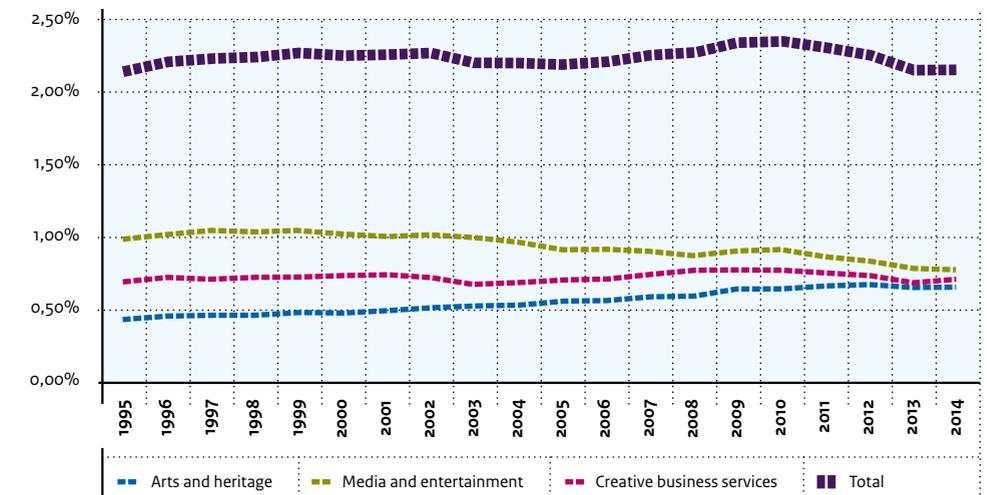


[4 : Trends in the culture sector]

4.1 : Financial trends

The value of the cultural and creative sector is not only intrinsic but also economic. Amongst other things, that economic significance can be expressed as the sector's contribution to the country's gross domestic product (GDP). Figure 4.1 shows how that contribution has developed over the past twenty years.

Figure 4.1 : Contribution of cultural and creative sector to gross domestic product 1995-2014, as percentage of GDP (in basic prices)



Source: CBS Maatwerk, 2015 | Explanation: figures for 2013 adjusted provisional figures, 2014 provisional figures.

Figure 4.1 shows figures for the whole sector. The subsidised section of the culture sector is only part of this. The picture during this period has been fairly stable, with a contribution to GDP of around 2.25 percent. These figures do not indicate any clear effect of the financial crisis (from 2007 on). The figure does show a fall since 2010. Since then, there has been a decrease in creative business services and in media and entertainment. The contribution to GDP by the arts and heritage sector has remained stable. Over the whole period (1995-2014), the contribution of media and entertainment has fallen and that of the arts and heritage has increased. These macro figures sometimes conceal significant differences within sectors. We know, for example, that architecture (part of the creative business services sector) was relatively hard hit by the crisis. In recent years (2014 and 2015), the number of assignments has been rising again.

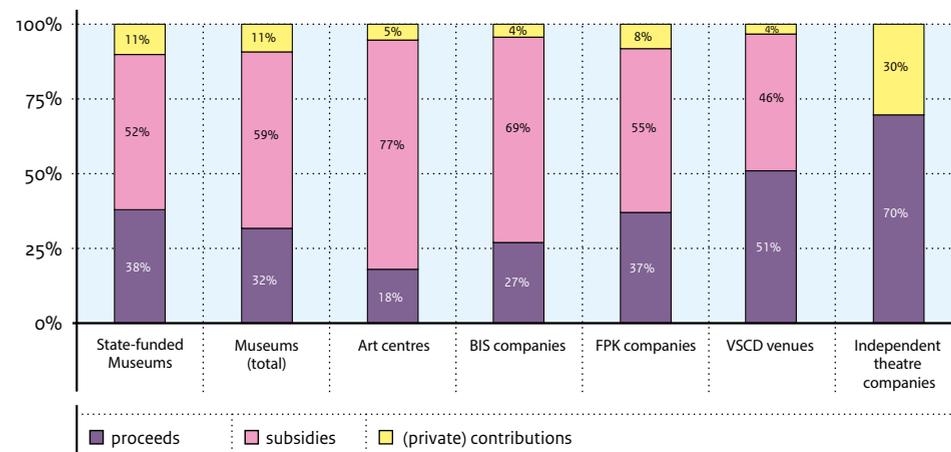
Trends in the funding mix

Cultural institutions receive income from a variety of sources. The figure below shows the trend for the following three sources of funding:

- Subsidies: subsidies from central government (ministry, national cultural funds), province, municipalities, and the European Union. These include both operating and rent subsidies and both structural and occasional subsidies.
- Revenues: contributions from private parties that receive something in return. These includes visitor-generated income, sponsoring, and income from hospitality services and merchandising.
- Private funding: contributions from private parties (individuals or businesses) that do not receive anything in return (directly). Examples are private funds and donations from businesses or “Friends of ...” associations.

Figure 4.2 shows the funding mix for various sectors. This concerns the distribution of the various types of income. The proportion of subsidies in the subsectors is roughly between half and three quarters of the funding. Independent theatre companies do not receive a subsidy, and most of their income therefore comes from revenues (70 percent). Exhibition spaces for the visual arts have the highest subsidy percentage (77 percent) and VSCD performance venues (Netherlands Association of Theatres and Concert Halls) have the lowest (46 percent).

Figure 4.2 : Funding mix for various types of institution, 2014



Bron: Rebel & APE, 2015

How has the funding mix developed since 2012? Table 4.1 shows the trend for a number of sectors.

Table 4.1 : Trend in funding mix in the various sectors

		2012	2013	2014
Dutch film productions	proceeds	-	-	-
	subsidies	56%	49%	52%
	(private) contributions	27%	34%	25%
State-funded museums	proceeds	29%	30%	38%
	subsidies	62%	58%	52%
	(private) contributions	9%	12%	11%
Museums (National Museums Association)	proceeds	24%	27%	32%
	subsidies	70%	62%	59%
	(private) contributions	5%	10%	11%
Art centres	proceeds	17%	20%	18%
	subsidies	78%	74%	77%
	(private) contributions	5%	6%	5%
BIS institutions for performing arts	proceeds	23%	28%	27%
	subsidies	76%	70%	69%
	(private) contributions	1%	2%	4%
FPK institutions for performing arts	proceeds	34%	36%	37%
	subsidies	63%	58%	55%
	(private) contributions	4%	6%	8%
VSCD venues	proceeds	48%	50%	51%
	subsidies	44%	43%	46%
	(private) contributions	7%	7%	4%
Independent theatre companies	proceeds	88%	84%	70%
	subsidies	0%	0%	0%
	(private) contributions	12%	16%	30%

Source: Rebel & APE, 2015

Between 2012 and 2014, the subsidy proportion in the various sectors declined. Only the VSCD performance venues were an exception. The decrease in the subsidy proportion is greatest for the museums. That does not mean that museums had the most drastic cut in their subsidy but that the subsidy constitutes a smaller part of the total funding. This is apparent from the larger proportion of the revenues. The performing arts companies show a similar effect, but the proportion of revenues is increasing less than in the case of the museums.

4.2 : Trends in offering and visits 2009-2014

The Netherlands offers a wide cultural range. It is provided, all year round, at permanent locations such as museums, performance venues, galleries and libraries, but also at festivals and events that last only a few weeks or days. Most of the cultural offering is created on the free market.

4.2.1 : Size of the culture sector

In order to give an idea of the size of the sector, Table 4.2 below shows the number of institutions and the number of visits in 2014 for a number of cultural sectors. The table shows both publicly funded and non-funded sectors. The information relates to institutions which are members of a sector organisation or receive public funding.

Table 4.2 : Number of institutions and visits in various cultural sectors 2014

	Number of institutions	Number of visits (in millions)
• Libraries (branches and members)	1.035	3,9
• Bookshops (sales outlets for KBb members)	1.471	-
• Cinemas and art cinemas	180 ^a	30,8
• Festivals ^b	801	22,7
• Venues of the Association of Dutch Pop Venues and Festivals [Vereniging Nederlandse Poppodia- en Festivals] (VNPF)	49	2,1
• Venues of Dutch Association of Theatre and Concert Hall Boards [Vereniging voor Schouwburg- en Concertgebouwdirecties] (VSCD)	136	10,4
• Independent theatre companies	14	-
• Publicly funded institutions for performing arts (BIS + FPK) ^c	100	4
• Galleries	475	-
• State-funded art centres (BIS + Mondriaan Fund)	25	-
• Museums (members of Netherlands Museums Association)	415	25,9
• State-funded museums	29	10,0

^a Excluding art house cinemas without week programme and open-air cinemas

^b Festivals with more than 3.000 visits

^c Excluding publicly funded festivals

Source: *Cultuur in Beeld 2015*

4.2.2 : Matthew effects?

In its investigation *Cultuur herwaarderen* [Revaluing Culture] the Netherlands Scientific Council for Government Policy (WRR) considers a possible “Matthew effect”, i.e. “the rich get richer and the poor get poorer”. In terms of cultural policy, this means that the larger institutions do succeed in bringing in more visitors and acquiring more self-generated income but that the smaller institutions are less able to do so. This is supposedly because large institutions – due to their size, professionalism, and reputation – are better equipped to generate income for themselves. The WRR writes: “Some cities and institutions will be able to reproduce and improve on their success, whereas others run the risk of their position continuing to deteriorate.”

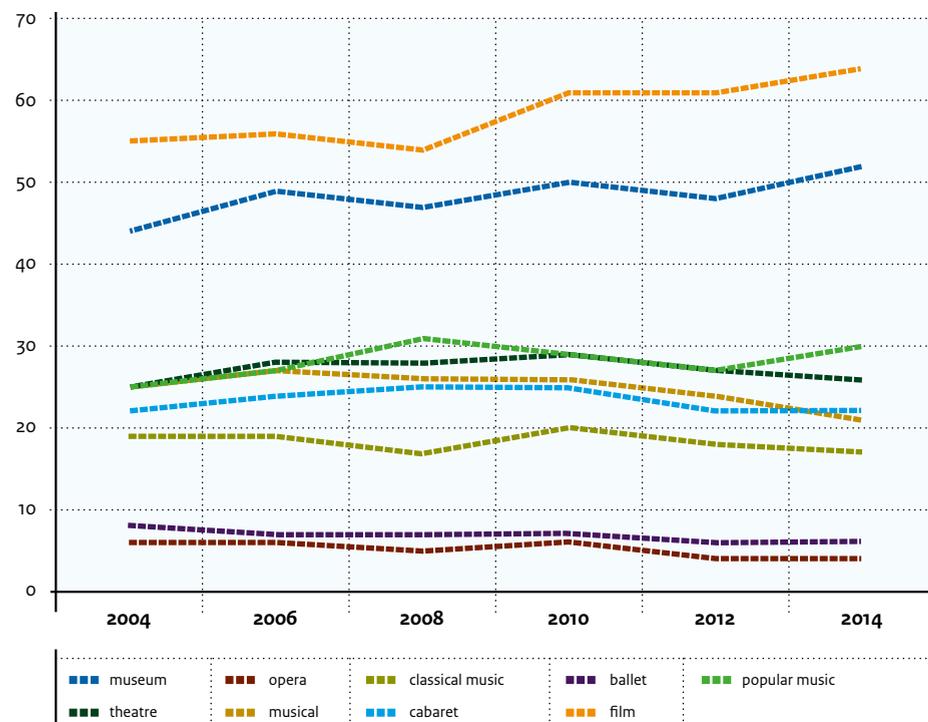
Large museums do better

In 2015, the CBS looked at the situation in 2011 and 2013 at the 799 Dutch museums. It made a distinction according to the size of the museums. The CBS found that in those years the major museums received the most funding and benefited most from the growth in the number of visitors. That was partly due to the reopening of a number of major museums. The growing number of foreign museum visitors also go mainly to the country’s major museums. In addition, the CBS noted that, on average, the major museums had a positive operating result at the end of the year, i.e. money that could be reinvested in the museum. That does not apply to the small and medium-sized museums, which had, on average, a negative year-end result. The CBS considered that these figures would seem to confirm the Matthew effect, although it believes that substantiating this would require research over a longer period.

4.3 : Cultural reach

Figure 4.3 shows the trend in cultural reach among the population aged 18 and over in the period 2004-2014. It shows that the reach of museums has increased in the past eight years. Where “canonical” performances are concerned (i.e. classical music, ballet, opera), a slight decrease is apparent. For popular forms of culture, the picture is a mixed one: the reach of musicals and cabaret declined somewhat, but it increased for film and pop music. In recent decades there has been increasing public interest in popular forms of culture, with interest in canonical forms decreasing.

Figure 4.3 : Cultural reach among Dutch population aged 18 and over, 2004-2014, percentage who went to a performance once or more in the past 12 months



Source: SCP (SLI 2004 - 2014)

4.3.1 : More frequent visits to popular performances

The main outlines of cultural reach in the years 2012 and 2014 are summarised in Table 4.3.

Table 4.3 : Cultural reach and visit frequency of visitors, 2012-2014, 6 years and over

	2012		2014	
	% reach min. 1x/12 months	average number visits	% reach min. 1x/12 months	average number visits
Performances total	84	11,1	84	10,4
• of which popular performances (incl. film) ¹	81	9,6	82	8,8
• of which canonical performances ²	38	1,6	38	1,6
Museums	49	1,9	53	2,2
Libraries (visits)	42	4,6	39	4,3
Total performances, museums, libraries	89	17,7	89	16,9

¹ Popular performances: film, cabaret, pop, musical, Dutch "levenslied" songs, jazz, urban, dance, world music, folk dancing, celebration with live music, and celebration with live theatre.

² Canonical performances: classical concert, opera/operetta, theatre, classical dance or modern ballet, and literary meeting/reading session.

Source: SCP/CBS (VTO 2012-2014)

Table 4.3 clearly shows a larger proportion for popular performances (including film). Popular performances reach 82 percent of the population, canonical performances 38 percent. That difference is even greater when we look at how often people go to a performance. In the case of popular performances, the frequency is about five times higher. Measurements were taken at only two points (2012 and 2014), which is not sufficient to see a trend.

4.3.2 : Reach of the visual arts

A study in 2014 provided greater clarity about the reach and frequency of visits to visual arts presentations. That reach partly overlaps with that of museums. The result is summarised in Table 4.4. Most people come into contact with the visual arts in public places: 44 percent of the population say that they look at visual art in public places at least once a year. The average is 2.5 times a year.



Table 4.4 : Reach and frequency of visits to visual arts according to location 2014, 6 years and older

	% scope min. 1x per 12 months	ave. number visits
Museum or exhibition of “old” art	29	0,8
Museum or exhibition of modern art	23	0,6
Museum or exhibition of media art, such as photography, video art, or film	18	0,4
Museum or exhibition of design, fashion, or architecture	12	0,2
In a public place, such as a square, park, or public building	44	2,5

Source: SCP/CBS (VTO 2014)

The same study also provides a better understanding of the reach and frequency of visits to heritage sites other than museums (see Table 4.5). In 2014, a quarter of the population aged 6 and older visited a “historic festival or event at which traditions, customs, or crafts are practised”. This give an indication of the interest in intangible heritage.

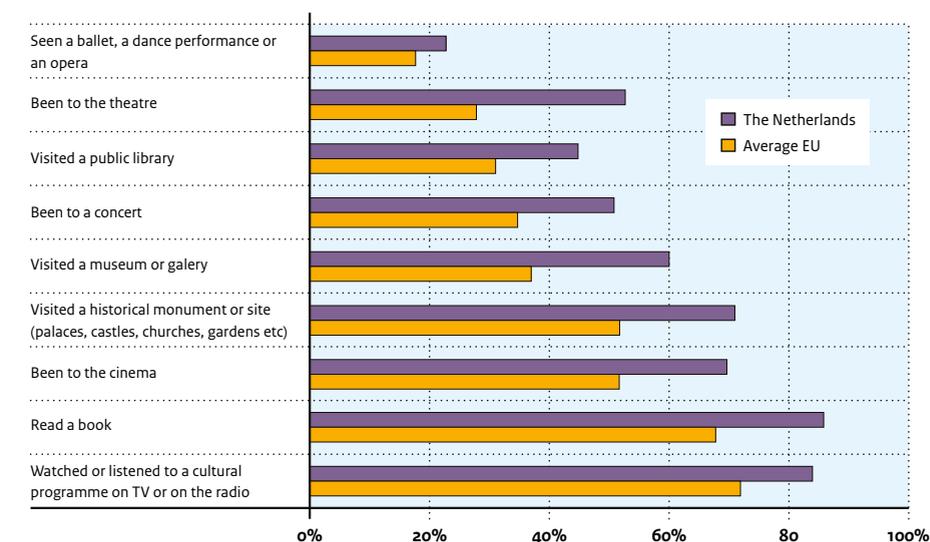
Table 4.5 : Reach and frequency of visits to heritage sites (other than museums) according to location 2014, 6 years and older

	% reach min. 1x per 12 months	ave. number visits
Archive	5	1,2
Archaeological excavation	12	2,1
Historic town, village or building, such as a castle, church, windmill, or old factory	59	2,5
Historic festival or event at which traditions, customs, or crafts are practised	25	0,5

Source: SCP/CBS (VTO 2014)

Cultural reach in the Netherlands from a European perspective

The Eurobarometer (2013) allows the cultural reach in the Netherlands to be viewed from a European perspective (Figure 4.4). With some Scandinavian countries, the Netherlands is among the countries with the highest level of participation in cultural life. The cultural reach in the Netherlands, measured as at least one visit in the past twelve months, is above the average for EU Member States, particularly where theatre and museum visits are concerned. This is partly due to the relatively high level of education of the Dutch population. The differences to previous figures for cultural participation in the Netherlands are due to different study methods.

Figure 4.4 : Cultural Access and Participation, 2013

Bron: Eurobarometer 399

Support for culture by individuals

In 2012 and 2014, the SCP's *Vrijetijdsomnibus* (VTO) included questions about various types of support for culture: voluntary work in the culture sector, membership of “Friends of...” associations, and donations. By the culture sector, the SCP means both professional institutions and festivals and amateur associations. The result is summarised in Table 4.6.

Table 4.6 : Support for culture, 2012-2014, percentage of the population aged 12 and over

	2012	2014
Some form of support	32	31
Voluntary work	10	10
“Friend of...”	9	8
Donor	21	20

Source: SCP/CBS (VTO 2012-2014)

A third of the Dutch population aged 12 and over support culture in some way or other. Support for culture remained virtually the same between 2012 and 2014. According to the *Vrijtijdsomnibus*, 10% did voluntary work in the culture sector, somewhat more of whom were men than women, and remarkably evenly distributed across age groups (see Table 4.7). Of people aged over 12, 9 percent are a member of a “Friends of...” association in the culture sector. This proportion gradually increases by age group from 2% (age 12-19) to 14% (age 65 and over). The well-educated are almost twice as likely to do voluntary work or become a member of a “Friends of...” association and are more frequently donors. Members of “Friends of...” associations are often volunteers or donors as well.

Table 4.7 : Support for culture according to age and education, 2012 and 2014, as percentage of population aged 12 and over

	voluntary work		“Friend of...”		donor	
	2012	2014	2012	2014	2012	2014
Population aged 12 and over	10	10	9	8	21	20
Age						
• 12-19	10	10	3	2	9	8
• 20-34	9	11	5	3	13	11
• 35-49	10	9	7	8	24	23
• 50-64	9	10	13	10	27	25
• 65 and over	10	10	14	14	29	26
Education: not in education, older than 20						
• primary, preparatory vocational, lower secondary	8	8	8	7	22	19
• secondary vocational, upper secondary, pre-university	8	12	7	8	20	21
• university of applied sciences, research university	14	13	15	13	30	27

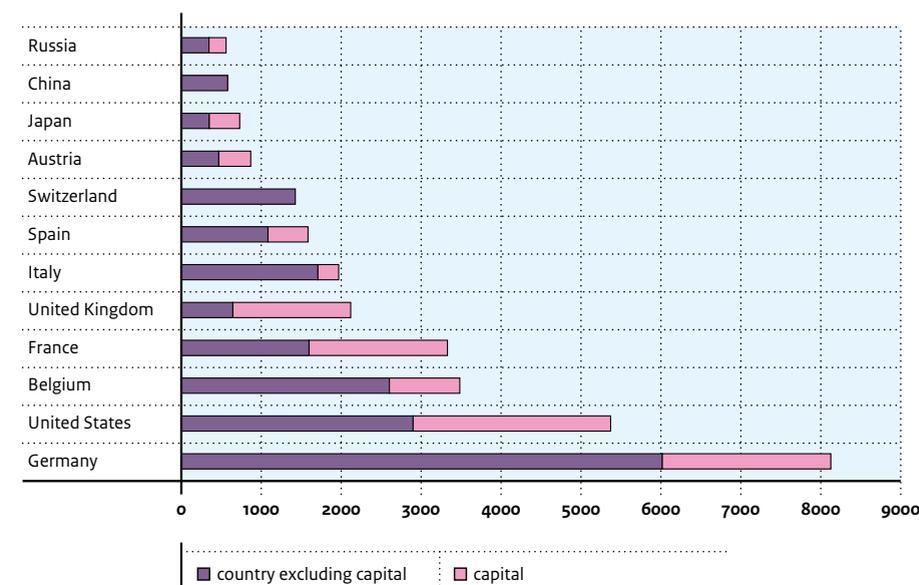
Source: SCP/Statistics Netherlands (VTO 2012-2014)

4.3.3 : Interest in Dutch arts abroad

Dutch artists and cultural institutions are active abroad so as to reach audiences and buyers there. International cultural policy encourages exchanges with other countries. The study *Nederlandse kunst in de wereld 1980-2013* [Dutch Arts in the World] analyses the spread of Dutch arts abroad over recent decades, focusing on architecture, the visual arts, and literature.

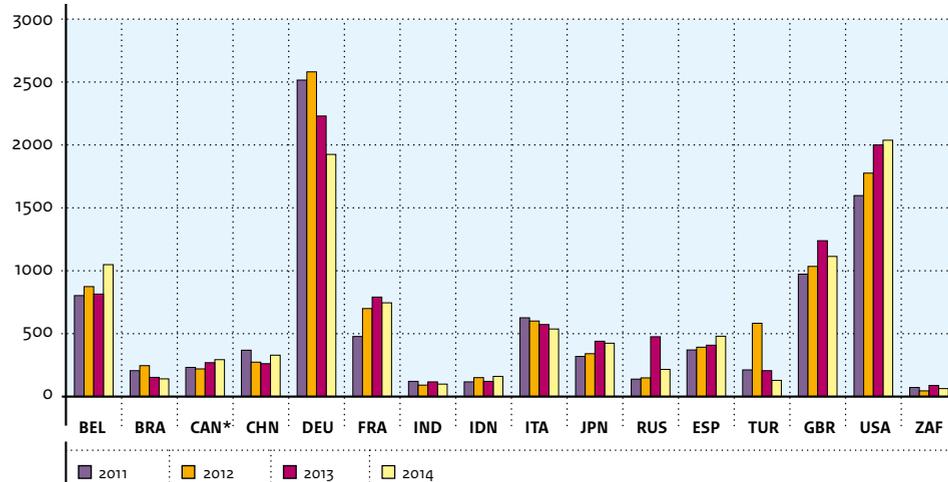
Dutch arts and culture are mainly visible in Europe (Belgium, France, Germany, and the United Kingdom) and in North America (the United States). Germany stands out, taking 20-30 percent of all Dutch foreign representations in the form of translations, buildings constructed, or participation in exhibitions. Germany is not only an important market but also acts as a springboard for building the reputation of Dutch arts elsewhere in the world. Figure 4.5 shows the situation for the visual arts. The countries shown and their capitals were responsible for over 85 percent of the number of representations between 1980-2013.

**Figure 4.5 : Number of representations by Dutch visual artists, by country, 1980-2013
15 most important countries, country and capital**



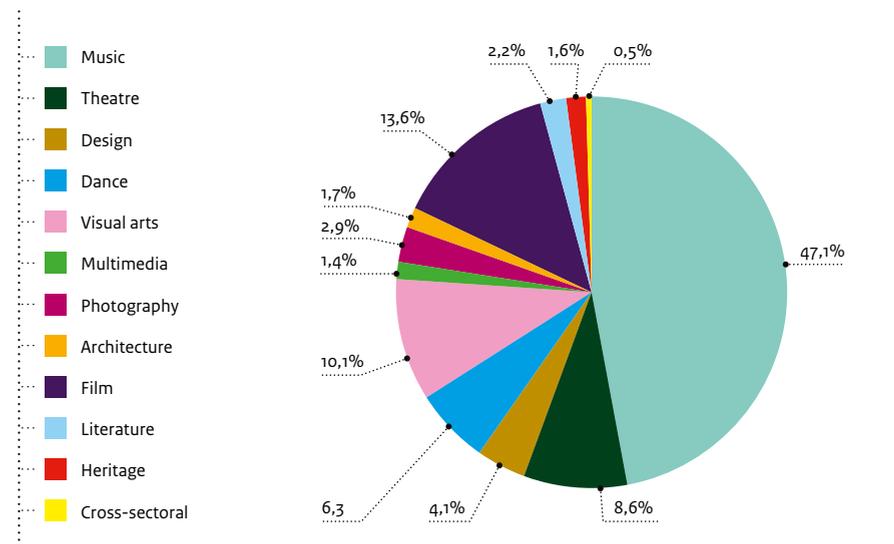
Source: *Cultuur in Beeld* 2015

Figure 4.6 : Number of Dutch cultural activities around the world, by country



Belgium (BEL), Brazil (BRA), China (CHN), Germany (DEU), France (FRA), India (IND), Indonesia (IDN), Italy (ITA), Japan (JPN), Russia (RUS), South Africa (ZAF), Spain (ESP), Turkey (TUR), the United Kingdom (GBR), and the United States (USA) are priority countries for Dutch International Cultural Policy. *Canada (CAN) is not classified as a priority country but is one of the countries in which a relatively large number of Dutch cultural activities take place. Source: Buitengaats, DutchCulture

Figure 4.7 : Dutch cultural activities abroad, by sector (2014)



Source: Buitengaats, DutchCulture

The important role of Germany and the United States is also apparent from “Buitengaats”, a database in which DutchCulture, the centre for international cooperation, has recorded the foreign activities of artists and cultural institutions since 1999. The sector with the most international appearances in 2014 was music, with a noticeable increase in the pop/dance genre. Partly thanks to the popularity of Dutch DJs, the US – with 2044 recorded activities – has replaced Germany (1927 activities) as the main destination country.

4.3.4 : Cultural tourism

In the tourism sector, economic and cultural interests come together. In 2014, tourists and day-trippers contributed a total of EUR 68.3 billion to the Dutch economy. This is a contribution of 3.7 percent of GDP and 5.2 percent of employment. The growth of tourism in the Netherlands was significantly stronger in recent years than that of the Dutch economy. It is largely due to the greater numbers of foreign tourists visiting the country.

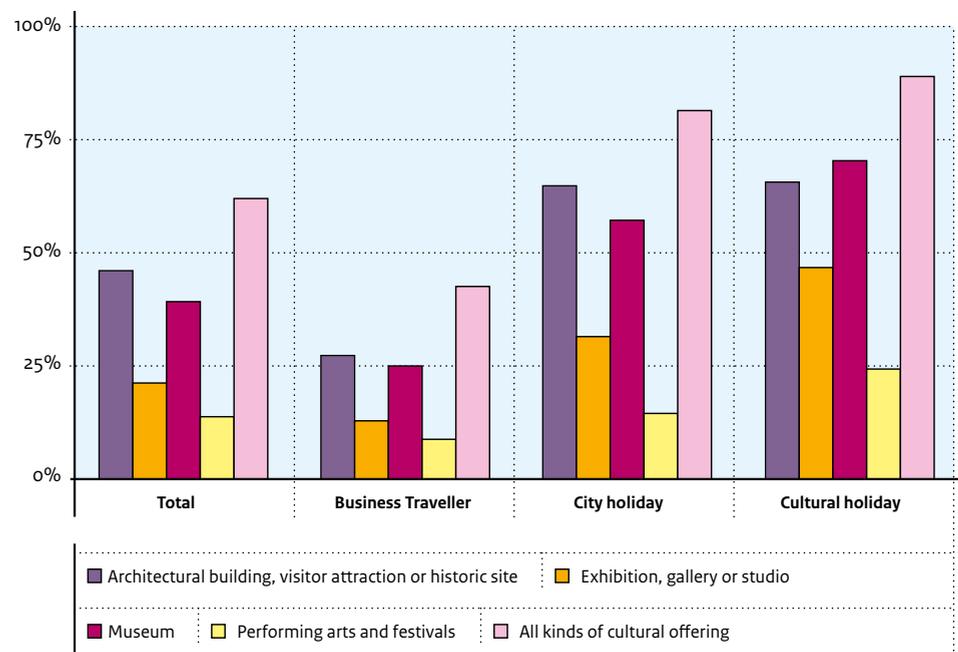
Reason for holiday

For many tourists, cultural experience is an important reason for going on holiday. In part, this is the primary reason, but increasingly it is also an additional activity during the holidays and as part of a visit to a region or city. Tourists visit both tangible material heritage (museums, churches, cityscapes, and landscapes) and intangible heritage (folklore, traditions, music, and dance).

According to the Eurobarometer, culture was one of the reasons for 27 percent of Europeans to go on holiday, 5 percent more than in 2012. Among Dutch people, cultural holidays were even more popular, with over a third giving this as a reason.

In 2014, foreign tourists often included a cultural visit as an additional activity during an overnight stay in the Netherlands. This is shown by the incoming tourism statistics kept by the Netherlands Board of Tourism & Conventions (NBTC). In 2014, six out of ten foreign tourists made one or more visits to heritage sites, historical sites, museums, exhibitions, festivals, or theatres.

Figure 4.8 : Visits by foreign tourists to cultural activities according to reason for holiday, 2014*



* Figures weighted according to country of origin
Source: NBTC/NIPO, 2014

The culture on offer was an important reason especially for foreigners coming to the Netherlands on a city trip, with 81 percent taking part in one or more cultural activities. Business travellers showed least interest in the Dutch cultural offering, but 42 percent of such foreign visitors nevertheless took part in at least one cultural activity.

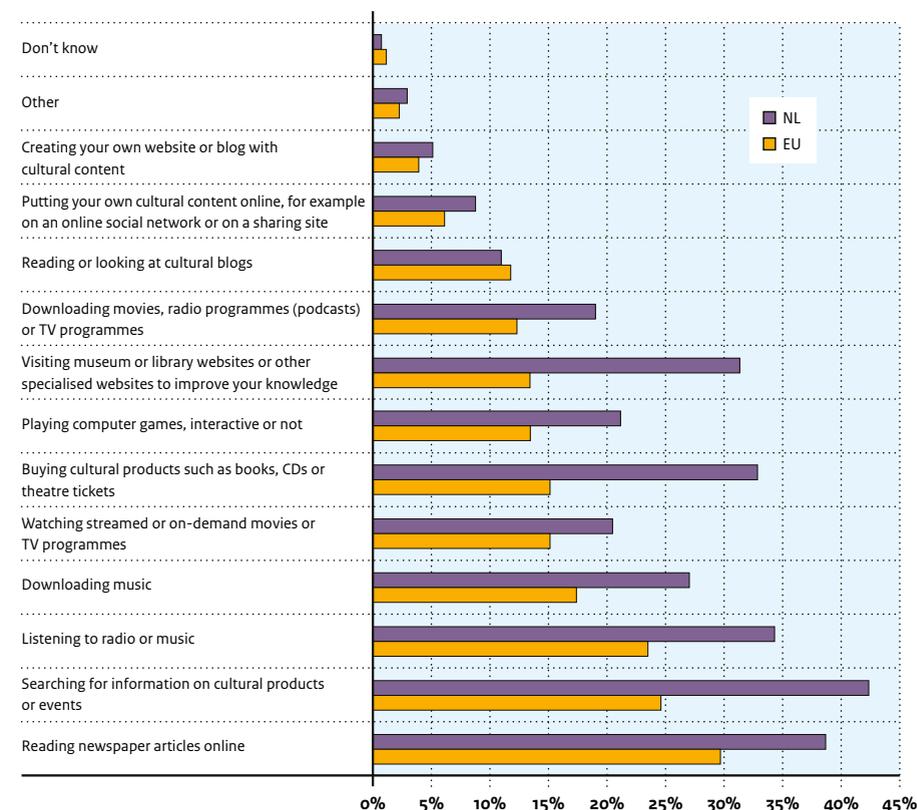
4.3.5 : Culture via the media and internet

The Netherlands has a very good digital infrastructure and widespread use is made of the (mobile) internet. In the period from 2010 to 2015, use of social media increased from 70 percent to nearly 90 percent of the population. Facebook is by far dominant in daily use. The social media landscape is constantly changing. Facebook and Google+ are still growing, but for the first time there has been a decline in the use of Facebook among young people aged 15-19. Relatively new platforms such as Instagram and Pinterest are of growing importance.

All the available data indicates that it is not only overall use of the Internet and social media that is increasing but also their use for cultural purposes. For the first time, the Eurobarometer (2013) provided an insight into the use of the internet for cultural purposes. On average, 56% of the European population aged 15 and over used the internet in 2013 for a variety of cultural activities. In the Netherlands, the figure is significantly higher, at 73%.

Figure 4.9 : Use of the internet by EU citizens for cultural purposes in 2013

Percentage of the population aged 15 and over, at least once in the past 12 months



Source: European Commission, Special Eurobarometer 399. Cultural access and participation (2013), pp. 54-60, edited by the Ministry of Education, Culture and Science.

Cultural use of media

The 2014 VTO included a number of questions about use of the media for cultural purposes, i.e. reading about culture in printed media, listening or watching culture via radio, TV or via the internet and social media. In practice, it is becoming increasingly difficult to distinguish between these four media: increasingly, printed media also appear in digital form, and radio and TV are not only broadcast but can also be accessed in all kinds of ways on the internet and social media. Table 4.8 summarises the results.

Table 4.8 : Reach of cultural media use, population aged 12 and older, 2014

At least once in the past 12 months, in %

	printed media	radio/TV	internet	social media	media total
Popular performances	51	68	48	38	77
Canonical performances	34	42	21	18	54
Visual arts	30	32	23	15	42
Heritage	34	38	24	15	49
Culture total	64	78	56	44	86

Source: SCP/CBS (VTO 2014).

Digital versus live reach of culture

The digital reach of culture is of an extent approximately comparable to the non-digital (live) reach: 86 percent of the Dutch population aged 12 years and older come into contact with culture via one of the media at least once a year. There are clear differences between the various genres. Popular performances reach 77 percent of the population via the media and canonical performances 54 percent. There is also another reinforcing factor. Media activity for popular performances is more intense and more frequent use is made of the internet and social media, for example the use of smartphones at pop concerts to take photos and send messages. Finally, it is noticeable that the “old media” (newspapers and magazines, radio and television) still play a major role.

In the summer of 2015, more than a third of the Dutch population aged 15-70 made use of a streaming music service. Only some of that use was paid for, with most users selecting the non-charge variants with advertising. Dutch people are also making increasing use of video-on-demand services such as Netflix. In the summer of 2015, not even two years after starting operations in the Netherlands, this provider was reaching one in seven Dutch households.

Digital books

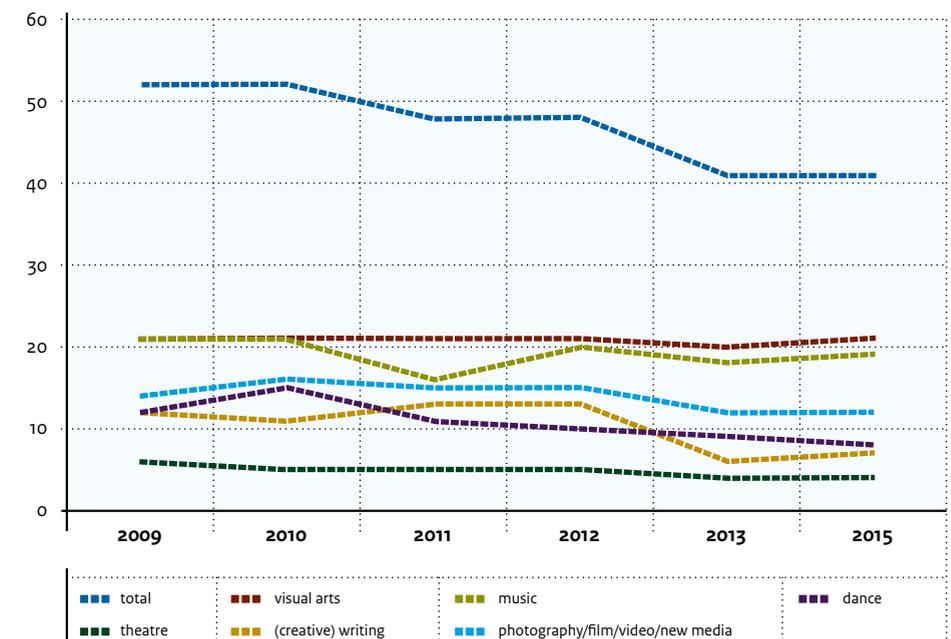
Since January 2014, Dutch public libraries have also been lending ebooks via the bibliotheek.nl website. Compared to the total of 75 million books borrowed, the number of ebooks is still modest, but it is growing rapidly. In the first half of 2015, about twice as many e-books were borrowed than in the first half of 2014, and in July 2015 three times as many. Ebooks account for 6.5% of books sold. Public libraries have also developed a number of apps, for example the “VakantieBieb” (i.e. the “Holiday Library”), which offers a selection of e-books especially for the holiday months. In 2015, more than 2.2 million e-books were downloaded from the VakantieBieb, with about a quarter of them actually being opened. The Dutch market for books is also changing under the influence of digitisation. “Elly’s Choice” is an initiative by two major Dutch publishers. The formula

involves the consumer paying a subscription fee for a number of free ebooks each month, in addition to a regular supply of e-books.

Dutch heritage institutions, such as museums, archives and libraries, are working hard to digitise their collections and make them accessible to the public. The government often acts here as the director, financier and implementer, for example with the National Digital Heritage Strategy.

4.4 : Arts and heritage practice

About half the Dutch population are themselves active in the arts and nearly a third in connection with heritage. Many children come into contact with culture at school. Cultural education is an important element in the development of children and young people, allowing them to become aware of beauty and develop their talents. It also contributes to historical awareness. Active participation in culture and cultural education at school are important components of cultural life.

Figure 4.10 : Trends in active involvement in the arts 2006-2015, percentage of Dutch population aged 6 and older, active in the past 12 months

Source: LKCA, Nieuwe Monitor Amateurkunst 2015

The percentage of Dutch people involved in some form of amateur arts was just as high in 2015 as in 2013. The proportion is higher among girls and women (50 percent) than among boys and men (32 percent). Relatively speaking, more children aged 6 to 11 (61 percent) and young people aged 12 to 19 (53 percent) are involved in amateur arts than adults aged 20 and older (between 39 and 36 percent). In 2015, it was the visual arts (21 percent of the population) and music (19 percent) that were the most popular and theatre the least (4 percent). The percentage of people involved in the various types of activities was virtually the same as in 2013.

Learning via the internet or apps

Almost 30 percent of the amateurs have lessons or take a course, or sometimes a workshop. In order to learn something, 28 percent make use of digital examples or instructions on the internet or an app. Young people and adults do this more frequently (36 to 29 percent) than children (12 percent) or the over-65s (18 percent). Those who learn via the internet or apps do so mainly by means of video clips and examples on media such as YouTube or Facebook (90 percent). Downloading learning materials (27 percent) is less popular, as are participation in an online community (26 percent) or the use of special apps (15 percent).

Arts and heritage practice in 2012 and 2014

Since 2012, the SCP's *Vrijetijdsomnibus* (VTO) has included some new questions about people's active leisure-time involvement in culture. In addition to "arts practice" (previously "involvement in amateur arts") it now also asks about "heritage practice" (see Table 4.9). For the first time, this provides a picture of the activities of non-professionals in the heritage sector, for example people who maintain and operate windmills in their spare time or amateur archaeologists. This is an important addition to our knowledge of people's involvement with heritage. It shows that more than 60 percent of the Dutch population aged 12 and older are actively involved in arts and/or heritage practice in their spare time.

Table 4.9 : Cultural, heritage, and arts practice, 2012-2014, 12 and older

	2012	2014
Cultural practice (heritage and/or the arts)	64	61
Heritage practice	26	30
Arts practice	55	51
Involved in both	17	21

Source: SCP/CBS (VTO 2012-2014)

4.5 : Cultural education

Quality Cultural Education programme

The year 2012 saw the start of the Quality Cultural Education programme [*Cultuureducatie met Kwaliteit*] for primary school children. The programme ensures that cultural education is an integral part of the curriculum at primary schools. It means that children are in contact with music, dance, theatre, and heritage throughout their time at primary school. The programme has led to a curriculum framework for artistic orientation, which supports teachers at schools in providing cultural education. In late 2013, the Primary Education Council [PO-Raad], the provincial and municipal authorities, and central government set out their aims in the area of cultural education for the next decade in the administrative framework for Culture and Education.

As part of the *Quality Cultural Education* programme, 54 projects have now commenced in which schools collaborate with cultural institutions on high-quality cultural education in the classroom. The programme currently reaches 2500 schools.

More and better music education

Since 2014, the Ministry of Education, Culture and Science has been working with private parties to provide more and better music education for primary school children. The ministry has made EUR 25 million available for this up to 2020, with the private parties also providing EUR 25 million. Schools can work with all the parties in the field of music, such as music schools, concert bands and brass bands, orchestras and popular music venues.

Continuous learning pathways and cohesion between subjects

Continuous learning pathways and coordinated curriculums are intended to make cultural education an integral part of the school curriculum. A study by Sardes and Oberon shows that there is little cohesion in primary education. Many schools (41 percent) indicate that cultural education consists of occasional, unrelated subjects. At almost half of the schools, some subjects are coordinated. Only 6 percent of the schools say that they work with a coordinated structural programme.

Table 4.10 : Cohesion in cultural education at primary schools

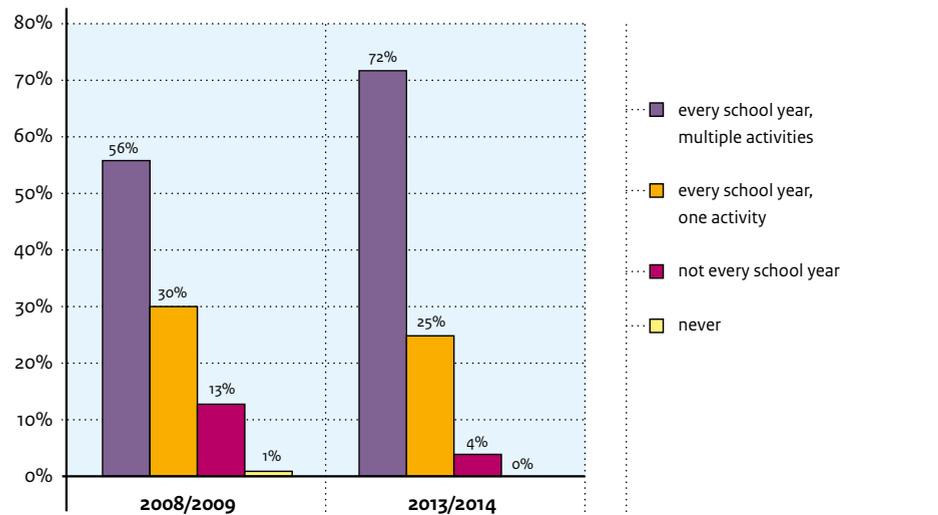
	percentage
Occasional, unrelated subjects	41
Some subjects are coordinated	47
There is a coordinated structural programme	6
Other, namely:....	5

Source: Sardes & Oberon (2014)

Coordinated programme

There is more coordinated cultural education in secondary than in primary education. However, there is a difference between lower and upper years. Of teachers in the lower years, 18 percent say that there is a coordinated cultural education programme; for higher-year teachers the figure is 35%. In 17 percent of cases, cultural education in the lower and upper classes of secondary schools is well coordinated. At almost half of the schools, some activities are coordinated.

Figure 4.11 : Organisation of cultural activities at primary schools 2008/2009 – 2013/2014



Source: Sardes & Oberon (2014)

Cooperation between cultural institutions and schools

Schools often work with cultural institutions within their cultural education programme. Since 2013, a cultural institution that wishes to qualify for funding from the Basic Infrastructure for Culture must contribute to cultural education by providing education content. Most cultural institutions succeed in reaching their intended target group(s) with their educational offering. In 2013, the reach for all age groups increased compared to 2010 (see Table 4.11).

Table 4.11 : Reach of educational offering of cultural institutions

	percentage 2013	percentage 2010
Children from 0 to 4	68	*
Children from 4 to 8	81	*
Children from 8 to 12	83	*
Young people from 12 to 19	75	65
Adults from 20 to 34	72	54
Adults from 35 to 65	92	52
Adults over 65	87	38

* In 2010 the question concerned the reach for children aged up to 12. The percentage then was 45%.
Source: Sardes & Oberon (2015)

Two thirds of primary schools make use of what is offered by institutions. This may involve the joint development and implementation of activities or a question from the school which an institution responds to. The link-up with curriculums is often problematical. This is because schools operate on the basis of particular disciplines (music, drawing, theatre) and of themes or periods, whereas cultural institutions often operate from the perspective of their own long-term programming.



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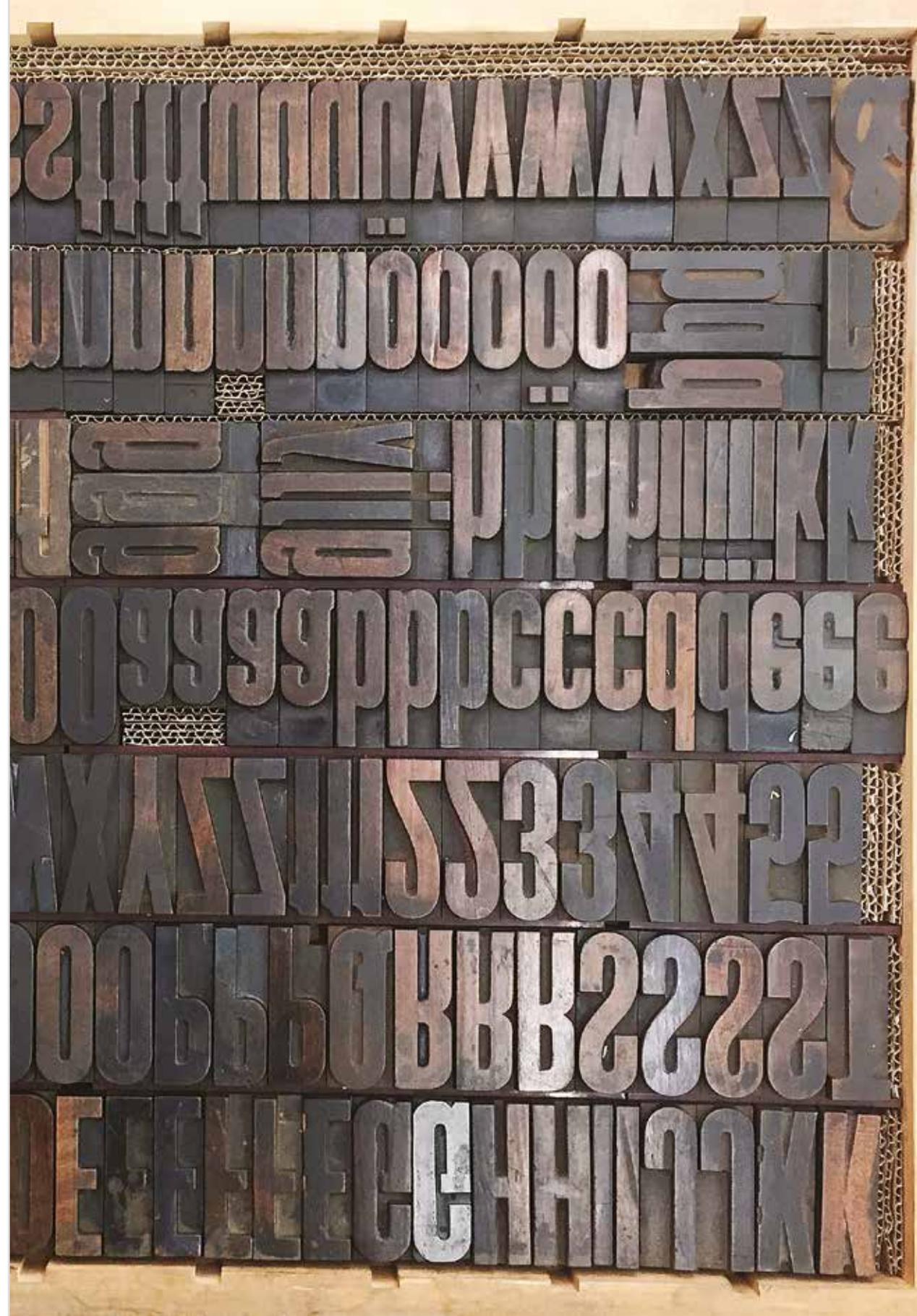
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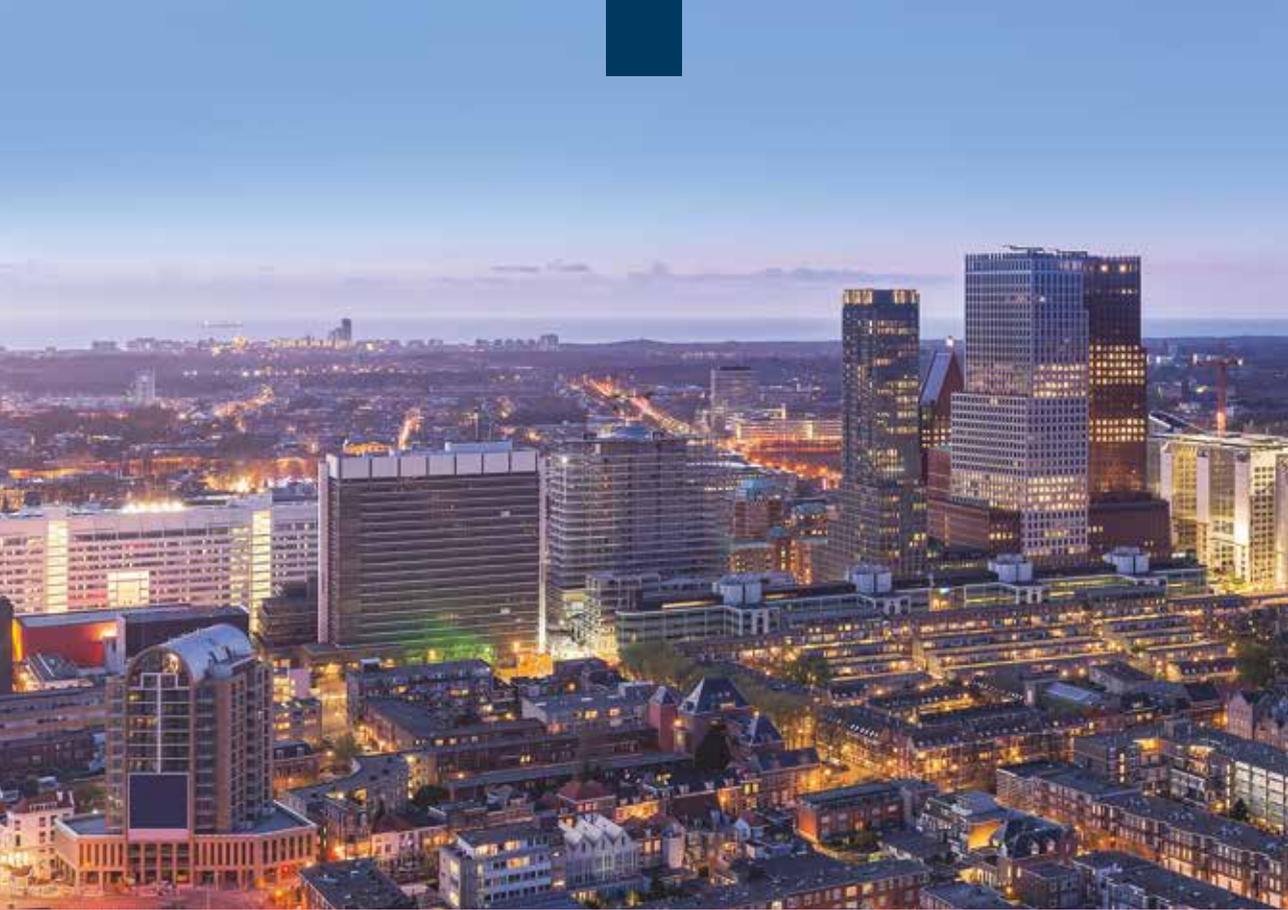
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