



CH Sustainable Management Guidelines 1st POLICY BRIEF

ReInHerit

Number - 101004545



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About the Deliverable

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Contents

1. Executive Summary	5
2. Positioning of the ReInHerit project.....	6
3. Cultural Heritage Management: challenges and opportunities.....	6
4. Mapping the Cultural Heritage Sector in Europe: the ReInHerit Primary Research	7
5. Policy Recommendations for creating a sustainable digital cultural heritage ecosystem.....	13

1. Executive Summary

The D7.4 Sustainable Management Guidelines 1st Policy Brief presents the conclusions drawn from the primary research (focus groups and questionnaires conducted in 2021) that maps the cultural heritage sector's current needs. The ReInHerit 1st Policy Brief sets a series of strategic recommendations on sustainable heritage management with an emphasis on closing the communication and collaboration gap between the sector's stakeholders. The aim of this document is to raise awareness and provide guidance to policy makers and heritage professionals at large for bridging the gap. Therefore, it constitutes a first attempt in providing a policy framework regarding sustainable heritage management.

2. Positioning of the ReInHerit project

Responding to the European Commission's key priorities – on digital strategies and cultural sustainability – and the challenges in the cultural heritage sector, the overall objective of ReInHerit is to create a model of sustainable heritage management based on a digital dynamic European network of heritage stakeholders. This model will be facilitated by a digital cultural heritage ecosystem (Digital Hub) in which all the stakeholders (heritage professionals, policy makers, researchers, communities etc) will be provided with the tools and resources to communicate, experiment with, innovate and disseminate European cultural heritage. This focus on cooperation and its operational structure within the context of digital innovation has the prospect of being the core of sustainable cultural heritage management.

3. Cultural Heritage Management: challenges and opportunities

As emphasized by European and international treaties and policies, the cultural heritage sector has a crucial role to play in cultural sustainability. Aligned with rapid societal changes, cultural heritage has been reconceptualized as a resource and process that can make a positive contribution to forming inclusive, peaceful and sustainable societies. In this context, it has become necessary for museums and heritage sites to redefine their role and convince the various communities of their value in contemporary societies. This has led to calls for democratized and values-based approaches to heritage management that consist of bottom-up methodologies with multiple forms of knowledge and epistemologies. The extensive desk research (literature review) conducted by the ReInHerit project has identified some key challenges that emerge from this radical transformation of the cultural heritage sector across Europe.

Key challenges for cultural heritage management

- As the concept of heritage is being increasingly expanded and bottom-up approaches are being increasingly adopted, the cultural heritage sector is becoming less discipline dependent. This has produced a fragmented field with different professional experts who often have difficulties in communicating with each other.
- Museums have an important duty to collect, preserve and disseminate tangible and intangible heritage, within the context of the important calls for repatriation and decolonization, but this becomes more and more difficult due to various limitations as well as differences in mentalities and lack of information (including lack of resources but importantly uses of institutional lacunae and/or political will or difficulties arising from illicit trafficking).
- The sector is pressured to generate income, whilst budgets are decreasing, and to create sustainable business models.
- Museums/heritage sites have to care for highly complex and multi-layered communities (e.g. digital natives, digital heritage tourists, groups with different capacities) with various cultural understandings, needs and experiences. As a result, there is a difficulty in sustaining core audiences, museums have learned to care for; especially, in the context of the 4.0 Industrial Revolution, web-based museum audiences are often circumstantial in character (they are in various discursive spaces and lack the cohesion characteristics of localized communities).
- Climate change and environmental issues have had an enormous impact on conservation and preservation of tangible and intangible heritage, and it has become a crucial part of the sector's commitment towards society.
- The outbreak of COVID-19 and the continuous constraints that have been imposed as a response to the pandemic present critical risks for the sector due to the intermittent closure of

sites (especially in the first stage of the pandemic) and the later measures put in place to protect individuals. Importantly, it has heightened the different challenges faced by the sector, which now strives to find new methods of operating.

Key opportunities: new modes of collaboration

These challenges necessitate an urgent adoption of sustainable practices in heritage management based on a digital infrastructure and digital innovation. Due to the prevalence of digital technology across heritage management and the organization constraints faced by smaller museums, collaborations between the cultural and the technology sectors have become more prevalent. Aligned with the democratic and inclusive approach to heritage management, the principal aim of current research is to enable museums to autonomously design digital tools for enhancing visitor experiences. The importance of collaborations or networks in these endeavors has been identified as an essential activity of the cultural heritage sector. However, it is still considered as an additional task by the sector that is outside of its core mission and, as such, it is outsourced.

It is crucial for the cultural heritage sector to facilitate different forms of collaboration, between different stakeholders (from the public and private sector), within the context of digital innovation and this action to be supported by policy frameworks. The strategic design of cultural experiences based on digital innovation processes and infrastructure, as the outcome of collaboration between museums and heritage sites, can be the medium for producing new meaningful relationships between the sector's stakeholders. Digital collaborations, focusing on a sustained institutional commitment to experimentation and innovation as a core aspect of sustainable cultural heritage management, have the potential to empower different cultural heritage organizations to address their challenges and fulfill their important role in cultural sustainability.

4. Mapping the Cultural Heritage Sector in Europe: the ReInHerit Primary Research

The primary research conducted by the ReInHerit project is structured in three phases and, so far, has produced qualitative and quantitative (via questionnaires and focus groups) data. The overall aim is to collect data on the current methodologies and practices used in the Cultural Heritage Sector, for communication, collaboration, and exchange of good practices in heritage management. The first phase of primary research was conducted in the form of focus groups with the aim to map the current challenges faced by the sector to understand what the needs of the professionals in terms of heritage management, focusing on how they connect with their audiences and with other stakeholders and how the ReInHerit project can aid them. In the second phase of the primary research, based on the results from the focus groups, questionnaires were employed to map the professionals' and visitors' use and experience of digital tools (including those to be provided by the ReInHerit project) in the museum/heritage site context. This has produced data that shows the emerging trends in cultural heritage management in Europe and provide evidence for bottlenecks and opportunities on how museums/heritage sites can effectively connect with their audiences and with other heritage professionals using digital infrastructure. The third stage of the primary research in the form of focus groups is currently being organized and will focus on how to build effective digital-cultural partnerships as a core part of a sustainable model of cultural heritage management. Strategic recommendations can be drawn from the data that have been collected so far on how digital collaboration and communication between the sector's stakeholders can be effectively implemented and form a digital cultural ecosystem.

- A. Focus Groups** (34 professionals from 12 countries in Europe): the focus groups give an indication of the key emerging trends in cultural heritage management and provide guidance as to how the ReInHerit project can be useful. The **urgent needs for the cultural heritage professionals in terms of heritage management are:**

Key messages from Focus Group Interviews

Audience Development/Outreach

- To communicate with young audiences and make museums/heritage sites relevant to them by developing and disseminating tools (incl. educational tools).
- To appeal to all types of audiences from all socio-economic groups, backgrounds, abilities, etc.
- To engage local populations and to connect collections & themes to a local context for creating a culture of going to museums and heritage sites.

Education

- To develop new educational approaches for different audiences as an activity that precedes their visit to the museum/heritage site.

Policy Outreach

- To work with local authorities and policy makers in a substantial manner.
- To communicate the important work done in relation to cultural sustainability (education, wellbeing, social cohesion, intercultural dialogue) to relevant stakeholders and policy makers.

Operational

- To adopt an inclusive and participatory approach to museum management with a horizontal approach to interaction.
- To provide service-design tools to help museums redefine their mission.
- To establish KPIs for measuring relevance and impact (digital and physical) as there is a lack of skills in impact assessment.

Financial Sustainability

- To increase financial resources through innovation, experimentation, and outreach activities.
- To establish financial sustainability for ensuring continuity of work and professional development.
- To cooperate with the creative sector for engaging different audiences and promote financial sustainability.

Social Cohesion

- To enable museum and heritage professionals (through innovation, impact assessment, sustainability models, heritage for tourism etc.) to respond swiftly to rapid societal transformations.
- To bring out the connection between cultural heritage (tangible and intangible) and wellbeing.

Digitalization

- To reinvent the idea of digitalization and online museums to cater to different audiences. To challenge established authoritative and exclusionary narratives.
- To establish well-functioning collaboration with experts in the ICT field and with audiences of all age categories due to the demands placed by rapid digital transformations (in part also because of the pandemic).
- To help cultural heritage professionals to participate in innovation activities.

The pandemic of COVID 19 had a multifaceted effect in the sector: it heightened the challenges already faced (such as lack of resources) and created new ones such as the closure of museums/heritage sites) but, also, it paved the way for innovation and new ways of working in the museum/heritage site management. This refocused professionals in redefining their mission and finding new tools for communicating with their audiences. The main challenge now is to adjust and combine this experience with the conventional museum/heritage sites experience and management and create the conditions (institutional, policy, technical or even epistemological) to enhance the full cycle of sustainable CH management process proposed by ReInHerit.

Figure 1: Mindmap of themes in the Focus Group Stage I



In view of the above, the most frequently mentioned required function of the ReInHerit digital platform, alongside training opportunities and sharing digital tools for addressing the above issues, was networking for sharing information and experiences in an easily accessible, hierarchy free, welcoming, and egalitarian manner.

- B. **Questionnaires** (886 responses from heritage professionals and 2481 responses from visitors from 37 countries in Europe collected between October and December 2021): based on the results of the focus groups and through a co-creation process among consortium members, questionnaires were produced to map on a bigger scale, the needs and interests of cultural heritage professionals and audiences in relation to the various tools that will be provided by the ReInHerit Digital Hub. The result is that there is a high volume of quantitative data that show the behavioral patterns of visitors and professionals, the digital capacity of professionals and their needs in relation to digital tools to be offered by the ReInHerit project.

Key messages from the Questionnaires

Initial results from the visitors' questionnaires:

The collected data demonstrate the emerging behavioral patterns towards digital tools (games, exhibitions, and immersive experiences): the use of digital tools is more positive among younger respondents. Virtual tours and exhibitions are found useful by most audiences of all ages; however, audiences aged over 65 have a lower percentage than the other groups. Younger respondents also have more often prior experiences of having used digital tools in a museum or cultural heritage environment. The audiences of the 18-29 and 30-44 age groups are more likely to use the digital tools the ReInHerit project is offering. **This points to the fact that, currently, the main target audience for digital solutions in museums belongs to the 18-29 and 30-44 age groups and this, clearly highlights, the need a) to develop digital tools that will appeal to all age groups and b) to try upskill all age groups.**

Initial results from the professionals' questionnaires:

The collected data show that larger organisations have the experience of organising technology assisted immersive experiences and offering digital games. This can be related to the emerging trend that there is a growing number of museums adopting a formal digital strategy and that digital engagement has become standard practice in the heritage sector. Nevertheless, as the ReInHerit survey shows, smaller museums still lack the capacity to incorporate digital tools in their everyday activities. All organisations had an interest in both the digital game and the immersive experience. However, smaller organizations need technical assistance, either guidance or a ready-made package, to implement these digital tools (for educational games, immersive performances, and exhibitions), since the task of digital implementation is usually outsourced. This indicates that small and medium size organisations are less likely to adopt these tools unless they are provided with support and guidance. **This points to the urgent need (a) for closer collaboration between larger and smaller museums and between heritage professionals and ICT experts for enabling smaller museums to innovate; (b) to produce the infrastructure in which smaller museums can make the digital turn in which they are active agents and not mere receivers. However, this requires also policy support.**

Figure 2 Usefulness of virtual exhibitions and tours in correlation with age

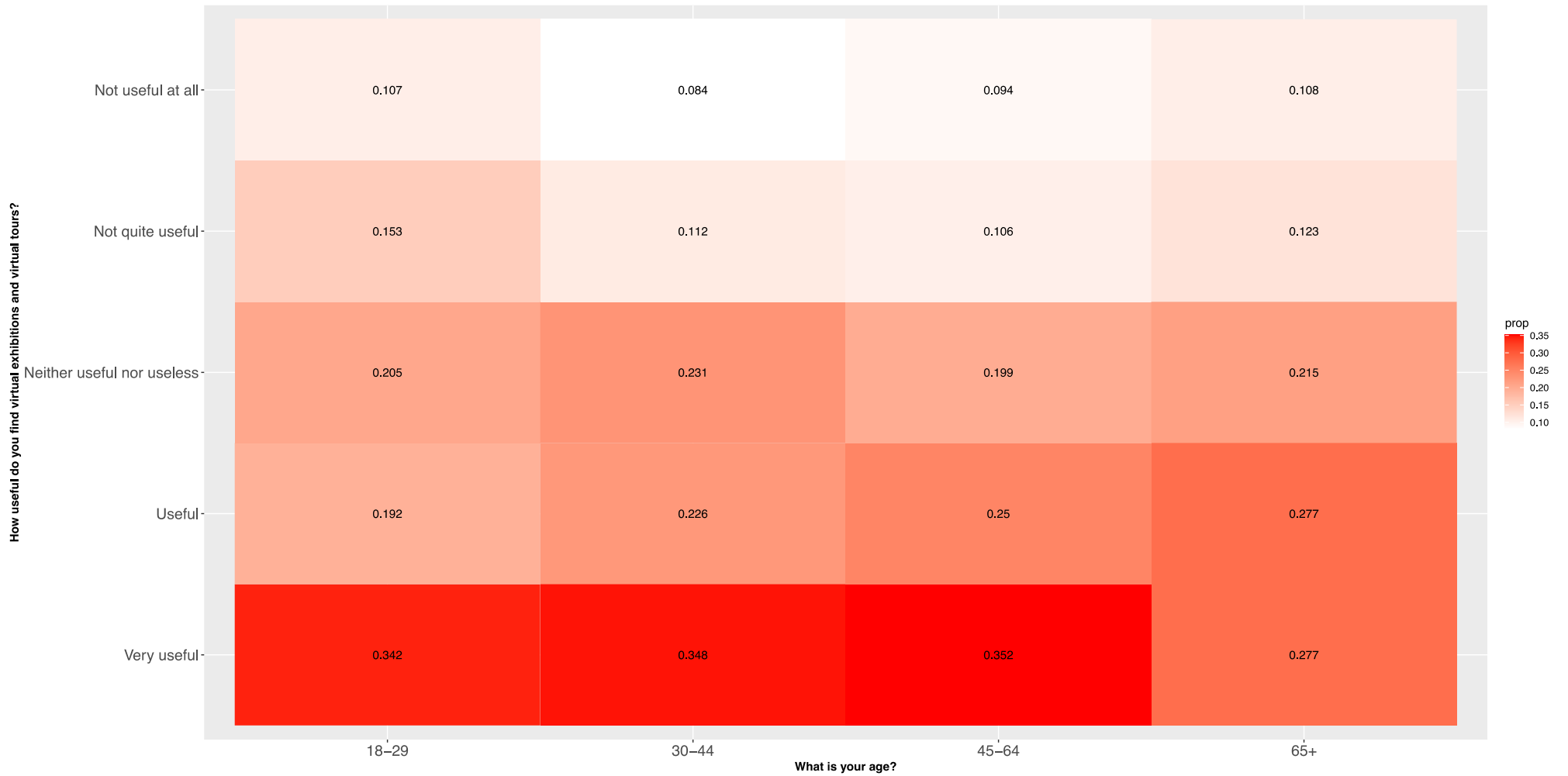
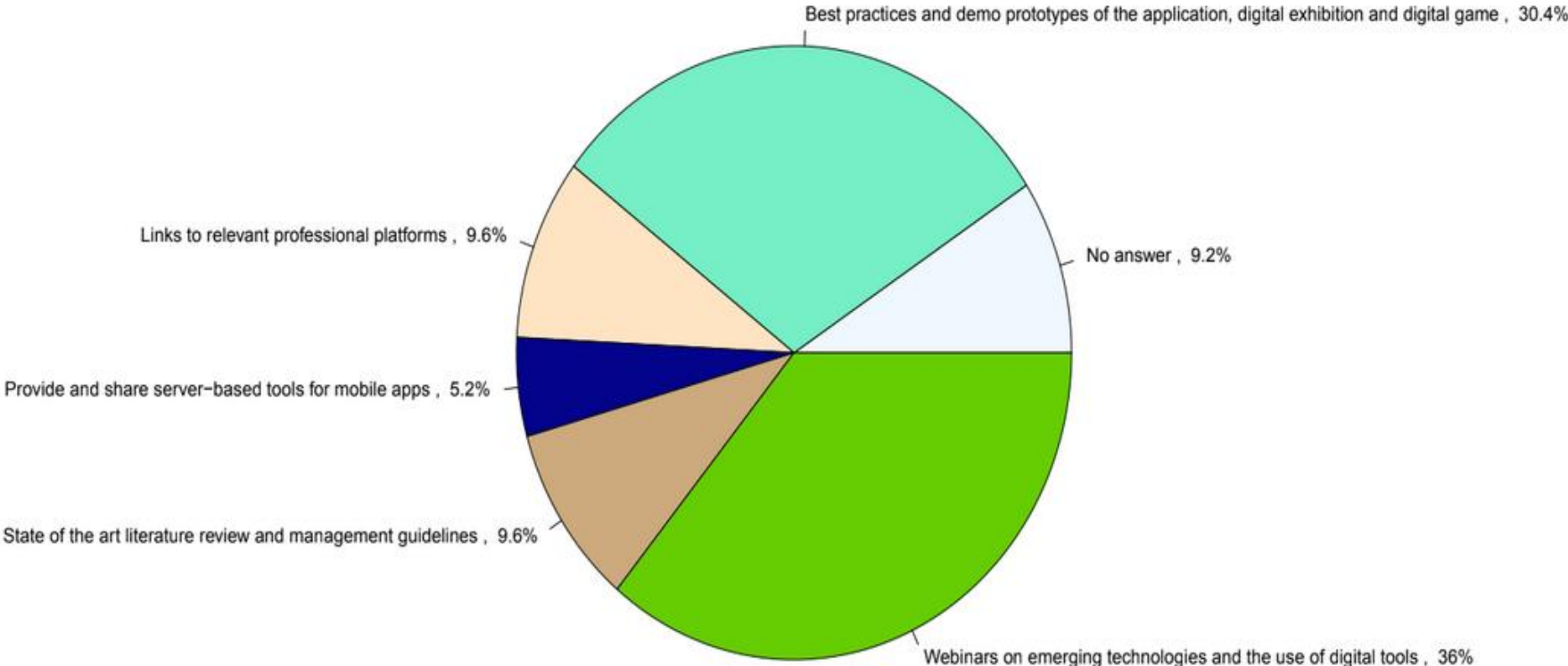


Figure 3 Interest in the tools and services provided by the ReInHerit Digital Hub



Importantly, these questionnaires have produced a large database on the cultural experience of different categories of audiences, specifically how they engage digitally with museums and heritage sites, and how current digital tools are employed by heritage professionals. The further analysis of this large set of data, which is currently being conducted and in correlation with the collection of additional qualitative data (in the third stage of primary research), will be used as an input in the designing process of the ReInHerit Digital Hub and Tools to make them relevant and useful to different audiences and to cultural heritage professionals for collaborating and communicating with all the different stakeholders of the sector (in accordance with the challenges identified).

5. Policy Recommendations for creating a sustainable digital cultural heritage ecosystem

By correlating the challenges identified in literature with the initial results from the first two stages of our primary research, we have drawn recommendations on how a sustainable model of heritage management based on digital collaboration and communication between all stakeholders (in the form of a digital ecosystem) can be effectively implemented. Our policy recommendations are structured around the following four themes:

Collaboration: enabler of sustainable cultural heritage managementThe analysis of our data confirms that the cultural heritage sector needs stronger creative digital cultural partnerships for cultural heritage professionals to effectively address their challenges and achieve sustainable cultural heritage management. More specifically, cultural heritage sites and museums need to:

- To **open and sustain lines of digital communication and multidisciplinary collaboration** with research institutes and universities so that we enhance research excellence (enhance research teams, combine different skills, knowledge transfer, higher quality analysis, stronger networks, facilitate comparative analysis at an international level).
- To **extend collaborative relationships** within and outside the world of culture.
- To **create new types of collaboration between the public and the private sectors** for implementing strategies that empower cultural heritage professionals.
- To **establish platforms for collaborations with policy makers** for gaining insights into policy issues and allow policy makers to realise the importance of collaboration with all heritage stakeholders.
- To **contact policy makers through platforms** and help them recognize that the cultural heritage sector needs specifically to develop new modes of collaboration with digital technologies at their core (between the different stakeholders such as audiences, ICT companies, policy makers and different heritage professionals) for sharing resources and expertise.
- To **explore new and existing models of interaction with policy makers** for developing processes to organize briefings, presentations, seminars and roundtables both nationally and internationally.
- To **further explore opportunities for engagement with Government departments**, facilitate and promote joint work with sector analysts to contribute expertise to policy formation (submissions, task-force participation etc.).
- To **suggest policies supporting small museums**, such as tax refund, or inclusion of the sector in ESG materiality discussion and agendas by suggesting benefits for the corporate sector if it supports the cultural heritage sector.
- To **create digital platforms for facilitating and promoting collaborations** among museums, heritage sites, cultural foundations, and other relevant institutions that allow for the combination of different skills, knowledge transfer, higher quality analysis, stronger networks, comparative analysis, and collaboration at an international level.

Digital Infrastructure for collaboration

Tangible methods for facilitating the digital transformation of small and medium sized museums need to be developed to enable the communication and collaboration between them and other stakeholders. To achieve this, cultural heritage professionals in collaboration with research institutes and the ICT sector need:

- To **produce and share new knowledge** that has sustainability as a framework for developing long-term strategic collaborations
- To **implement strategies** that **ensure** cooperation between digital designers (technical experts) and content producers (museum and CHS professionals)
- To **establish close interaction with policy makers at a national and international level for persuading them to support the creation of digital platforms as the infrastructure** for collaborations that are a) incorporated in heritage management without needing additional resources, and b) cultural heritage professionals actively participate in designing digital solutions.
- To **include in this digital platform training methods for digital upskilling and reskilling** cultural heritage professionals that will facilitate the digital turn in cultural heritage management.
- To **improve access to research output for all stakeholders on the evolution of digital technologies used in the sector through new and emerging technologies and media via a digital platform**. To increase CH professionals' awareness of new developments and their importance for the sector.
- To **inform the sector of funding developments/opportunities** by considering developments in the public, private and community sectors on digital transformation issues both nationally and internationally.

Finding relevance: connecting with local and global communities

The cultural heritage sector's approach to cultural experience has been shifted from a curatorial perspective to a value-based and human-oriented one but, in order for this shift to be meaningful, museums/heritage sites need tools that will enable them to align themselves with societal needs. To do so, the cultural heritage sector needs:

- To **develop and implement impact tools for defining and measuring relevance** in the sector that is adjustable to the local / global contexts of each organization through a prosperous dialogue among all stakeholders.
- To **inform and suggest solutions to policy makers for the digital upskilling of all age groups and educational backgrounds for the cultural heritage sector** to be truly inclusive, as cultural heritage management is increasingly becoming phygital and to adapt to the consequences of the pandemic (and its restrictions).
- To **inform and suggest solutions to policy makers for ways to make local communities friendlier to museums in practical ways and with practical benefits for both sides**.
- To **reach their audiences through different types of media platforms** and engage with European cultural heritage from different access points.
- To **create local networks with different stakeholders** by reaching out to schools, municipalities, ministries, and NGOs to co-produce key actions that will strengthen the sector.
- To **increase public awareness of the sector's work and importance via digital networks** and allow accessibility of research analysis and findings on technology and heritage to the media and broader society
- To **encourage online engagement of non-scholars, communities, individuals in the research and implementation** process by achieving a prosperous (intercultural) dialogue between academia, professionals, and non-experts.

Impact of COVID-19 on the Heritage Sector

Special emphasis needs to be placed on COVID-19 and its impact on the heritage sector, which has been profound in cultural heritage management. It heightened the existing challenges of the sector (for example audience development and sustainability, as mentioned by the cultural heritage professionals) but also provided opportunities for reconceptualizing the sector's role in society. Using its digital infrastructure, the sector can employ its communication tools to promote the relationship between cultural heritage and health/wellbeing. In this respect and by using the means we suggest above, the cultural heritage sector needs:

- **To create awareness among policymakers and the public of the research on the relationship between arts and well-being/health, and the effectiveness of arts and health interventions that has steadily grown in recent years.**
- **To suggest ways in which the arts can make a powerful contribution to health and well-being** based on the resources, findings and useable data that show the effectiveness of the arts in promoting and improving people's health and well-being in crisis such as COVID-19.
- **To develop hybrid models for experiencing cultural heritage** that will enhance the sector's

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6. Project Identity

PROJECT NAME	ReInHerit - Redefining the Future of Cultural Heritage, through a disruptive model of sustainability
COORDINATOR	Dr Ioanna Hadjicosti, Bank of Cyprus Cultural Foundation
CONSORTIUM	Bank of Cyprus Cultural Foundation (BoCCF), Cyprus ASOCIACIÓN ARTE SOSTENIBLE (Arte Sostenible), Spain University of Florence - MICC, Florence (UNIFI), Italy European Cultural Tourism Network (ECTN), Belgium School of law, University of Nicosia (UNIC), Cyprus CONSORZIO MATERAHUB INDUSTRIE CULTURALI E CREATIVE (MATERAHUB), Italy Nicholas and Dolly Goulandris Foundation-Museum of Cycladic Art (Cycladic), Greece University Graz (UniGraz), Austria CYENS-Centre of Excellence, Cyprus Scientific non-profit association BLUE SHIELD, Greece Arcada University of Applied Sciences (ARCADA), Finland Stadtmuseum Graz GmbH (GrazMuseum), Austria
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Bank of Cyprus
Cultural Foundation



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