



ReInHerit

Redefining the Future of Cultural Heritage, through a disruptive model of sustainability



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Acronyms and abbreviations

European Commission	EC
Research Executive Agency	REA
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Executive Summary

The **D2.6: A sustainable model of CH management state of the art report** is a booklet that is mainly based on the outcomes of the primary and secondary research on CH Management conducted by the ReInHerit project. Aligned with the aims of the project, it intends to: a) give an overview on the current state-of-affairs of professional practice in the CH sector across Europe, b) offer clear and concise information on the CH sector needs, challenges and bottlenecks, and c) eventually, provide measures in the form of practical recommendations that need to be taken into account so as to develop long-term cultural policies and strategies within the digital transformation and innovation context in order for museums and heritage sites to be relevant to contemporary societies. These policies provide museums and heritage sites with the abilities to adapt to different audiences, to develop new forms of communication at different levels within the sector and beyond, and to build new organizational structures where decisions, narratives, meanings involve networks of all stakeholders (heritage professionals, various communities, public authorities, policy makers, etc.). Furthermore, D2.6 offers suggestions to develop long-term strategies for the conservation, use and management of tangible (such as collections) and intangible heritage based on shared sustainable practices dependent on strong leadership, good governance and effective communication. The overall aim is to help CH professionals to get the necessary information and guidance to implement sustainable management policies in their organizations within the digital transformation and innovation context. The booklet helps the ReInHerit project to increase public awareness on European CH through co-creative, sustainable, and participatory digital practices.

Introduction

The ReInHerit project

In a constantly changing world, where rapid transformations (economic, social, technological, environmental) occur, the CH sector has a pivotal role to play. In the following years, museums and heritage sites need to reposition themselves more actively and visibly in order to continue being relevant in a rapidly evolving environment. As such, the ongoing ReInHerit project aspires to disrupt the current status quo of communication, collaboration, and innovation exchange between museums and heritage sites. It aims to connect CH collections and sites, and present Europe's tangible and intangible heritage to citizens and tourists in their wider historical and geographical contexts. The ReInHerit project proposes an innovative and inclusive model of sustainable heritage management, through which a dynamic network will be born; this network will comprise of CH professionals, innovation and CH solution tech experts, researchers, national museums, regional and local museums, and representative managers of Heritage Label sites. ReInHerit is also supported externally, by relevant municipalities, and museums, which will also enhance the communication and cooperation of the CH sector across the European Union and beyond.

The ReInHerit proposed model will be based on the development of a digital CH ecosystem, where all key stakeholders (museums, heritage sites, policy makers, professionals, and communities) will have an open and collaborative space to experiment, share and innovate. This will be achieved through the creation of an innovative Digital Hub. Tools and resources (on training, tourism, conservation, preservation, knowledge creation, content use/reuse, illicit trafficking of goods) necessary for sustainable management will be shared through the digital platform that will host the ecosystem. This ecosystem will also be the experiential open-ended space that will support and generate entrepreneurial initiatives, knowledge produced through co-creation, curation of digital content, and visitor experiences.

The aim of the booklet

This booklet is mainly based on the outcomes of the primary and secondary research on CH Management conducted by the ReInHerit project. Aligned with the aims of the project, it intends to: a) give an overview on the current state-of-affairs of professional practice in the CH sector across Europe, b) offer clear and concise information on the CH sector needs, challenges and bottlenecks, and c) eventually, provide measures in the form of practical recommendations that need to be taken into account so as to develop long-term cultural policies and strategies within the digital transformation and innovation context in order for museums and heritage sites to be relevant to contemporary societies. These policies provide museums and heritage sites with the abilities to adapt to different audiences, to develop new forms of communication at different levels within the sector and beyond, and to build new organizational structures where decisions, narratives, and meanings involve networks of all stakeholders (heritage professionals, various communities, public authorities, policy makers, etc.). Furthermore, this booklet offers suggestions to develop long-term strategies for the conservation, use and management of tangible (such as collections) and intangible heritage based on shared sustainable practices dependent on strong leadership, good governance, and effective communication. The overall aim is to help CH professionals to get the necessary information and guidance to implement sustainable management policies in their organizations within the digital transformation and innovation context. The booklet helps the ReInHerit project to increase public awareness on European CH through co-creative, sustainable, and participatory digital practices.

How is the booklet organized?

As clearly defined in the DoA of the ReInHerit project, the booklet is comprised of four main chapters with a bottom-up analytic approach.

The **First Chapter** maps the current status of affairs regarding professional practice in the CH sector across Europe. It summarizes the results of the primary and secondary research providing an overview of the main needs, challenges, bottlenecks, and opportunities in the CH sector as a whole. It, then, focuses on the main categories of audiences (young people, locals, and tourists) and discusses the bottlenecks that have been identified for actively engaging them in CH.

The **Second Chapter** presents initiatives of CH organizations that support communication between CH professionals and their various audiences. It deals with the methods and means to successfully reach various types of audiences, such as all ages groups with a focus on young adults, tourists (physical and digital), local communities and people disadvantaged on the basis of their identity. Each of these groups should play an active role in the CH sector.

The **Third Chapter** presents examples of three cases of CH organizations that strategically support the cooperation between European museums and heritage sites, having a positive impact in reducing the fragmentation of the field. More specifically, this chapter explores three case studies of best practices relating to how technology can potentially facilitate, or even dictate, collaborations - between museums and heritage sites, between museums and communities, and among different museums.

Finally, the **Fourth Chapter** provides suggestive measures on how the ReInHerit project can evolve beyond current professional practices and offer new knowledge in the sector. In this sense the CH sustainable management model forms a best practice in itself.

At the end of the booklet an **Appendix** is provided that includes an extra case study (in addition to those provided as a requirement in the GA). This case study relates to cultural tourism, and more specifically to a European Heritage Label, and serves as a best practice for engaging different audiences, such as tourists and young people, through technology.

Who is the booklet for?

On the one hand, the booklet gives an overview on the current state-of-affairs of professional practice in the CH sector across Europe. It is relevant to a variety of beneficiaries within the CH sector, such as museums, galleries, archaeological sites, folklore sites, monuments, libraries and archives, historic sites, religious sites, local cultural and/or historical associations, municipalities, and non-profit CH organizations. The booklet aims at facilitating communication between beneficiaries by rendering it better and more strategic at multiple levels, preserving tangible and intangible CH for future generations and balancing and coordinating the CH needs and the needs of people who would like to experience it. The concepts of digital-cultural partnerships, co-creation, communication, and sustainability, act as framework for developing long-term cultural policies and strategies and rethinking about patterns of consumption and current practices, modes of operation and managerial organization through a comprehensive approach that includes care for the environment and public health, develops practices for using new technologies and brings the concept of social awareness to the forefront. These concepts should be at the core of a sustainable CH management model.

The truth is that there is no such thing as a perfect system of CH management, given the fact any system should be flexible, adapt to changes and emerging needs in the economic, political, social and physical environment and adopt new ideas and practices as a response to those needs. The COVID-19 pandemic is the most recent example. However, some general guidelines, offered by this booklet, can provide a more comprehensive basis upon which a sustainable cultural management plan can be designed in the context of the ReInHerit project. Museums and heritage sites play a fundamental role in the cultural heritage sector and therefore their management is of utmost importance. They usually are complex entities required to perform a variety of roles given the fact that they acquire, research, arrange, describe, preserve, exploit, and make accessible to the public their collections and holdings securing parts of cultures and legacies for both present and future generations.

On the other hand, the booklet helps the ReInHerit consortium to feed and shape the next phases of the project (Toolkit-WP3, Digital Hub-WP4, Travelling and Digital Exhibitions – WP6, and Dissemination, Exploitation and Communication activities-WP7) as it provides clear and concise information on the CH sector needs and challenges and the measures that need to be taken to address them.

1. Current status of affairs regarding professional practice in the CH sector

Introduction

This chapter briefly summarizes some results of the primary and secondary research conducted in the ReInHerit project (WP2: CH Needs Analysis & Guidelines). The first section provides an overview of the main needs, challenges, bottlenecks, and opportunities in the CH sector as a whole across Europe. The second section focuses on the main categories of audiences (young people, locals, and tourists) and discusses bottlenecks that have been identified for actively engaging them in CH. It also looks at how CH can be relevant to these audiences and what methods have been suggested in this direction.

The **primary research** conducted by the ReInHerit project is structured in three phases and, has produced qualitative and quantitative (via questionnaires and focus groups)¹ data. The overall aim is to collect data on the current methodologies and practices used in the CH Sector, for communication, collaboration, and exchange of good practices in heritage management within a digital framework.² This initial research is essential, since it gives an overview on the current state-of-the-art in the sector as a whole, examining specifically the communication modes between museums and cultural heritage sites, thus identifying bottlenecks and opportunities in cultural heritage management and digital innovation at the same time. The research results identify the challenges, wishes and needs of museums, stakeholders and visitors (or even users) which highlight sustainability, digital technology and transformation, and audiences as crucial components of cultural heritage management and, hence, of exhibition planning. These interrelated issues are an important base for planning, organizing and implementing the ReInHerit pilot phase.

The **secondary research** conducted by the ReInHerit project aims to outline the relevant scientific literature on CH Management and position the project within it.³ It constitutes a systematic attempt to describe and analyse academic literature and research reports examining specifically the communication mode between museums and cultural heritage sites, thus identifying bottlenecks and opportunities at the same time. The trends identified in the literature emphasise on the Cultural Heritage sector needs, challenges and gaps concerning new technologies, materials, management tools, legal solutions, Intellectual Property Rights' (IPR) management, financing instruments, and visitors' and community involvement.

This chapter provides an excellent opportunity to highlight the interconnection between the different stages of primary research as well as the way in which the latter is linked to the secondary research. It shows how the rich material provided by primary and secondary research complements each other and how it can be useful in tangible ways to project outcomes.

¹ Questionnaires: one questionnaire was directed to heritage professionals (886 responses) and one questionnaire was directed to visitors (2481 responses from 37 countries in Europe) collected between October and December 2021. Focus Groups for heritage professionals conducted in May 2021 and in March 2022: 72 participants from more than 12 countries in Europe.

² For in depth information see Deliverables: D2.1 Focus Group Report Phase I, D2.3 Questionnaires Report, D2.4 Focus Group Report Phase II, D3.1 National Surveys Report.

³ For in depth information see Deliverable: D2.2 State-of-the-Art Report - Literature Review.

1.1. Mapping the CH sector in Europe: primary and secondary research

Primary and secondary research were conducted as part of the ReInHerit project to map the current status quo of the CH sector in Europe. The rich evidence derived from the research demonstrates that the CH sector in Europe faces multiple and complex challenges and encounters bottlenecks. The current situation in the CH sector can be summarized as follows:

- **Need for interdisciplinary collaboration so as to avoid fragmentations:** The CH sector is characterized by fragmentation at multiple levels, which creates serious gaps and obstacles to the sustainable management of cultural heritage. Dealing with the inclusive and extensive concept of CH, the entire sector became itself very broad acquiring an interdisciplinary character, since it cuts across many disciplines and fields (social sciences, humanities, architecture, law, management, marketing, finance, restoration, conservation, curatorship, ICT, museology, etc.). This has resulted in difficulties in communication and collaboration between different professional experts (e.g., CH professionals, ICT experts, IPR experts, etc.). As a result of this complex reality there are many adversities in terms of how these experts engage with CH and how they can work together.
- **Sustainable business models resilient to changes and crises:** Budget and funding are decreasing in the CH sector. Yet, financial sustainability is important for museums and heritage sites to pursue their aims and goals. Therefore, the CH sector currently faces the challenge to reassess its underlying business models. Innovative approaches to funding and sustainability are needed for museums and heritage sites to be resilient to change and crises, to promote and diversify the cultural offer, and to see opportunities where crises lay.
- **Engaging with audiences and opening up to new audiences:** museums and heritage sites are still facing adversities in sustaining and inspiring actual audiences as well as in attracting potential audiences. Engaging with audience is a complex process given the fact that there are different types of audiences with major diversities in motivation, interests, barriers, experiences, and needs. Audience has a broad meaning and contains a wide range of types such as: visitors (from local or other communities), domestic and international or physical and digital tourists, digital natives, researchers, educators, students or post students, online visitors (onsite or virtual ones), volunteers, media, institutions, donors, sponsors, friends, potential audience, etc. Furthermore, technological achievements and the recent COVID-19 pandemic changed audience behavior, and this change requires new policies that meet these needs. For example, in the context of the fourth 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. More specifically, the primary and secondary research identifies that CH professionals are facing difficulties in reaching specific target groups, such as young people, locals, tourists (physical and digital), people with disabilities and immigrants, making CH relevant to them. It is an extremely challenging task for CH professionals to manage the tangible and intangible cultural heritage taking into account the needs of the various audiences, using a management approach.
- **Need to redefine the management of collections based on evolving ethical standards and new trends:** museums and heritage sites need to redefine the way they manage their collections. They have an important duty to collect, preserve and disseminate tangible and intangible heritage, taking into account high legal, ethical and professional standards. Despite significant calls for repatriation and

decolonization of collections, there are several constraints, differences in attitudes and lack of information that make this task increasingly difficult and as a result create gaps of understanding between artefacts and the communities/countries these artefacts originate from. Lack of resources, the use of institutional gaps and/or political will or difficulties arising from illicit trafficking of cultural objects are some of the obstacles.

- **Environmentally friendly cultural institutions and sites:** climate change and environmental issues play a key role on how museums and heritage sites should be engaged with society as part of the sector's commitment towards it. They are expected to operate as change makers and leaders in order to better respond to the environmental challenges that the world faces today.
- **The pandemic, a challenge to crises management and an opportunity for digital services:** the wide-ranging impact of the COVID-19 pandemic and the measures to contain it present critical risks for the CH sector due to the intermittent closure of sites (especially in the first stage of the pandemic) and the personal protection measures. Importantly, it has heightened the different challenges faced by the sector, which now strives to find new methods of operating (including going digital) and dealing with abnormal situations where normal operation is not possible.

The adequate identification and analysis of the current status quo of the CH sector in Europe can facilitate museums and heritage sites to effectively implement a sustainable model of CH Management based on digital collaboration and communication between all stakeholders (in the form of a digital ecosystem). ReInHerit's primary and secondary research highlights the importance of effective collaboration between different stakeholders in the context of digital innovation placing it within policy frameworks. Collaborations, networks, and communication in the field of CH are not considered as additional tasks but form instead an integral part of the mission and vision of any museum and heritage site. Digital collaborations, focusing on a sustained institutional commitment to experimentation and innovation as a core aspect of sustainable CH Management, have the potential to empower different CH organizations to address their challenges and fulfill their important role in cultural sustainability. The innovative Digital Hub, which is currently designed by the ReInHerit project, can bridge the gap in the communication and collaboration between the various stakeholders of the CH sector (museums, heritage sites, policy makers, professionals, and communities), creating an open and collaborative space where relevant knowledge will be developed, transferred, and shared. Improving digital collaboration and communication in the CH sector can play a key role reaching out to different audiences.

1.2. Museums/Heritage sites and Audiences

Over the coming years, museums and heritage sites are called to successfully respond to the rapidly changing reality and act timely and effectively in such a manner and form so as to respond to their social role, responsibilities and the challenges arising.⁴ In this context, as shown by both the primary and secondary research, it is of immense important for museums and heritage sites to re-approach their relationship with their various audiences by offering

⁴ The text of the UNESCO Recommendation concerning the Protection and Promotion of Museums and Collections, their Diversity, and their Role in Society (adopted by the General Conference at its 38th Session Paris, 17 November 2015) recognizes the complex and essential role of museums in modern societies. For more see <https://unesdoc.unesco.org/ark:/48223/pf0000246331>.

them a truly **immersive experience and by making themselves open and accessible to all**. One of the proposed strategies enabling to reach this goal is **democratization of knowledge and an inclusive and a people centered approach**.⁵ In the future, however, democratization, social inclusion, and people centered approaches to CH should be further developed in order to ensure the relevance of CH to contemporary society. This should also be taken into account in the next phases of the ReInHerit project, especially those related to the development of the various tools that will comprise the ReInHerit innovative Toolkit (WP3 - ReInHerit Toolkit), the creation of an innovative Digital Hub (WP4 - Digital Hub), and the organization of the Digital & Travelling Exhibition (WP6 - Pilot Phase tested through Digital & Travelling Exhibition).

The secondary research points out that museum and heritage sites should turn their attention to **promote connections between people and heritage as well as to foster intercultural dialogue and understanding, sustainability and well-being**. In this way, they will better harness the full potential of CH to support sustainable development. The very existence of CH is largely based on the multiple values that people attached to it (Hall & McArthur 1998, 220). As a result, it is important to note that CH belongs to the societies that value it (Pearson & Sullivan 1999, 33). In this respect, in recent years CH Management approaches tend to transform from the 'conventional approach' to the 'human' or 'people' centered approach. In other words, **museums and heritage sites should focus not just on how they care for their collection but also how they care for people (audience, users, stakeholders, employees, etc.)**. When it comes to audience, it is an attempt to ensure the quality of the visitor experience, following, at the same time, the preservation practices and principles at the heritage property. Following these arguments, **the people who are connected to CH in multiple ways should be a core component of CH Management and an integral element of conserving that heritage**. CH Management should guarantee the long-term protection of CH considering its sustainability and the taking into account of the current needs of the public. This includes many different types of engagement of community with CH. It is the way to manage the past and current culture of humanity for the sake of the present and future generations. This complex process contains approaches about what actually CH is, how it can be used, protected and interpreted, by who and for whom.

Sustainability has become part of CH Management in the last decade at the latest. Museums and heritage sites are considered to be role models and therefore need to adapt to new concepts, requirements, and regulations. It has long been clear to all stakeholders in CH (at the latest when ICOM published their recommendations and strategy based on the United Nations 17 Sustainable Development Goals – 17 SDGs⁶) that the concept of sustainability is not just a trend, but it acts as a framework for developing long-term strategic cultural policies and rethinking about patterns of consumption and current practices, modes of operation and managerial organization through a comprehensive approach that includes care for the environment and public health, develops practices for using new technologies and brings the concept of social awareness to the forefront.

Furthermore, the secondary research points out that the impact of '**social inclusion theory**' has become increasingly prominent in the field of CH Management. As a response to the pluralistic and diverse societies, the Network of European Museum Organisations (NEMO) has published a supporting tool for museums that intends to engage more with social inclusion

⁵ See <https://www.icomos.org/en/focus/our-common-dignity-initiative-rights-based-approach/91199-a-reminder-that-people-centred-approaches-should-be-at-the-heart-of-cultural-heritage-management> and https://www.iccom.org/sites/default/files/PCA_Annexe-2.pdf.

⁶ See https://openarchive.icomos.org/id/eprint/2453/1/ICOMOS_SDGs_Policy_Guidance_2021.pdf and <https://sdgs.un.org/goals>.

and integration.⁷ Taking as an example Germany, a society with a high level of immigration, it proposes to move towards “*participative museums that encourage involvement from all social groups and that understand integration as a two-way process*” (p. 4). The guide recommends strategies that museums and heritage sites can follow concerning collecting (including conservation and research), exhibiting and public outreach. Many museums around the world have taken on the commitment to get involved with programs of social inclusion.⁸ However, there is still a lot of work that needs to be done.

Along this line, for the professionals that participated in the focus groups of the primary research, the key challenge for museums and heritage sites is to **redefine their relevance to today’s society**. It was noted that people want to see CH preserved but they do not practically support the sector. The secondary research points out that there is an increasing need for museums and heritage sites to understand the motivation, interests, barriers and wants of existing or potential audiences, to reach new audiences and to achieve greater visitor satisfaction. **Audience development** is the response to this need while museums and heritage sites have adopted this practice to place audience at the centre of their activity (Ayalla *et al.* 2019, 1-2).

The RelnHerit research identified **young people, local communities, and tourists** as key categories of audiences. Engaging them is a complex process given the fact that there are major diversities in motivation, interests, barriers, experiences, and needs. Furthermore, technological achievements and the recent COVID-19 pandemic changed audience behavior, and this change requires new policies that meet these needs. The common line for all categories is the urgent requirement to achieve relevance, active participation, and co-creation in CH Management.

Young people

Although young people are an age group that is included in many categories of audiences, such as tourists, local people, minorities, people with disabilities, etc., it is important for museums and heritage sites **to record them as a distinct group**. Young people should appear as an **important target visitor group in a wide range of activities included in CH Management**, such as audience development, collection management, marketing, digitisation, exhibition, etc. CH professionals that participated in the focus groups were particularly eager **to make CH more relevant to young people, attract and convince them to attend museums and heritage sites**.

However, both primary and secondary research identifies obstacles in the engagement of young people with CH:

- **Young people are not a homogeneous group and differentiation is needed.** For example, there are differences between young people in urban environments and young people in the countryside or between young people in different countries. Furthermore, this age group includes many adolescents and children in developed countries who are considered digital natives and use computers, social networking services and text messaging as their main means of communication and learning. Digital natives consume fast and in visual formats. They not only choose their content

⁷ For mor see [https://www.nemo.org/fileadmin/Dateien/public/NEMO documents/Nemo Museums Migration.pdf](https://www.nemo.org/fileadmin/Dateien/public/NEMO_documents/Nemo_Museums_Migration.pdf)

⁸ For an interesting example see the Museum Picasso: <https://www.blogmuseupicassobcn.org/2020/02/the-museum-as-a-tool-of-social-inclusion/?lang=en>.

but also produce audiovisual content. This reflects society: everybody has become a producer or co-creator of content.

- **There are conflicting views between CH professionals & young people on the nature of CH.** Many young people perceive cultural heritage as something boring and museums and heritage sites as boring spaces.
- **Younger generations are reluctant to learn about the history** of their region or about the CH of another country. Living in a globalised world, they have lost touch with their own roots, and they do not see the need to re-connect.
- **The inevitable shift towards digital technologies has a serious drawback when looking at the age group of 12 years and above (including teenagers).** No matter how good the digital medium that museums are developing, it has not reached the sophistication and artistry and refinement already found in commercial digital media through games and other types of digital encounters. On many occasions museums and sites need to compete with commercial/state of the art technology.
- **The relationship between young people and the CH cannot be seen as a mere matter of enjoyment.** The interest in CH is not usually a stand-alone interest It is also linked to history, education, ethics, personal development and fostering a culture in young people to respect and preserve CH for future generations.

Local communities

The secondary research identified as **a strategic issue for museums and heritage sites the engagement of local communities with CH** (Watson 2007; Golding & Modest 2013; Morse & Munro 2015; Kadoyamma 2018; Ayala *et al.* 2019, 7-10). Local communities are considered as **a key stakeholder in the CH sector**. There is an ever-increasing need for CH professionals to **establish a deep connection and relationship with their local communities**. It is clear that community support (Waterton & Smith 2010) is of vital importance for the sustainable management of CH and the survival of most of the CH organisations around Europe (Mackay 2021).⁹ CH professionals are particularly eager **to interact with their communities, to play crucial roles in their lives, and establish themselves as relevant and valuable assets to them**. In many locations around Europe museums and heritage sites cater mostly tourists. The Covid-19 pandemic showed that there needs to be a balance between the attraction of tourists and the increase of awareness to the local population. Most recent studies point out that museums and heritage sites are *“powerful catalysts for ushering social changes in their communities”* (Choi & Kim 2021, 2).

The secondary and primary research also points out that when museums and heritage sites are working with local communities, they are facing many challenges (Kershaw 2013-2014, 3; Kadoyamma 2018, 135-140):¹⁰

- **Demographics are changing faster than ever, making societies more racially and ethnically pluralistic.** Therefore, engaging local communities is more complex.
- **Specific resources and skills** are required within the organisation.
- **Organisation’s mission, its strategic plan as well as leadership team and staff** need to be committed to this type of work.

⁹ See also <https://en.unesco.org/news/unesco-and-iccrom-analyze-museum-trends-during-and-after-pandemic>.

¹⁰ See also <https://eriksen.com/arts-culture/engaging-culturally-linguistically-diverse-communities/>.

- At the same time, it is necessary for museums and heritage sites to **understand the complexity of the task of engaging with local communities and to secure appropriate funding and support.**
- **Commitment from everyone involved to think critically** about what the organisation does and an open mind to see opportunities and new ways of operating.
- **Time dedicated to think, discuss, and plan.**
- **For local communities intangible heritage is a prerequisite of their livelihood and existence.** Traditionally more focus has been placed on tangible heritage than on intangible heritage by museums and heritage sites. For museums/heritage sites to effectively communicate with their local communities, there is a need to include intangible heritage.
- **Need to preserve the character of the local community but ensure the sustainability and authenticity of the tourist product as well.**
- **In many places tourism is taken for granted and not enough attention is paid to the local public.**

Cultural tourists

Museums and heritage sites **play a key role in cultural tourism**, being part of almost every visitor trip, especially in countries such as Greece, Cyprus, Spain, and Italy. In recent years cultural tourism has evolved into an experience industry that provides many opportunities for museums and heritage sites of all types and sizes to further engage with the tourism market. This can help them to increase their audiences and revenues, as well as enhance their social role. In this context, it is important for museums and heritage sites to **redefine their relationship with tourists (digital or physical, domestic, international, etc.) on a more sustainable basis.** The secondary research showed that digital technologies impact tourists' consumption experiences, pointing out that the **increasing adoption of new technologies**, such as virtual reality and artificial intelligence, **have altered tourist behavior** in collecting information, evaluating and purchasing tourism products (Pencarelli *et al.* 2020, 170 with relevant bibliography). In the context of cultural tourism, this situation has changed the way that tourists access cultural offer of available destinations. Literature stresses the importance of taking into consideration the needs, the behavior and the motivation of 'digital heritage tourists' as well as the current dynamics of tourism communication, technology and human levels, when museums and heritage sites design sustainable and strategic planning activities (Di Meo 2017).

Nonetheless, the secondary research identifies bottlenecks faced by museums and heritage sites in terms of engagement with cultural tourists (Mousavi *et al.* 2016, 74; Richards 2018, 12.):¹¹

- **Rapid and uncontrolled tourism** growth can have multiple negative impacts, such as:
 - pressure on local communities and infrastructure from 'over tourism' during peak periods
 - the quality of life and well-being can be substantially worse for local residents

¹¹ See also <https://en.unesco.org/news/cutting-edge-bringing-cultural-tourism-back-game>.

- environmental risks (e.g., waste problems, global greenhouse gas emissions, etc.).
- **High visitor numbers to museums and heritage sites** can override their natural carrying capacity. This can undermine conservation efforts and affect both the integrity and authenticity of these sites.
- **Over-commercialisation and folklorisation of intangible heritage practices** (e.g., traditional dances, local customs, etc.). There is a high risk of inadvertently changing the nature of these practices over time so as to make them appealing to tourists.
- In many cases, **there are large commercial interests that monopolize the benefits of tourism**, and thus museums and heritage sites cannot benefit from them.
- **Over-dependency on tourism may result in localized monoeconomies**. As such, a sustainable development with diversification and alternative economic models is not promoted. Monoeconomies are more vulnerable to crises.
- **The distortion of the identity of CH** given the fact that the concept of tourism development implies that tourism 'products' should be consumed by tourists in exchange of economic benefits. As a result of the process of commodification, cultural tourists consume the commodified cultural products while local communities selling their identity, exhausting cultural resources and living a life expected from them by tourists.

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2. Communication between CH professionals and their various audiences

Introduction

Communication between CH organizations and their various audiences has been identified as a strategic issue for a sustainable CH Management. In recent years, this relationship has become even more complicated as a result of the Covid-19 pandemic, which has affected the CH sector in multiple ways. As discussed above, there is a general concern among CH professionals about reaching audiences. The extensive secondary and primary research conducted by the ReInHerit project produced a wealth of materials regarding the relationship between CH professionals and their audiences. This chapter provides recommendations arising from this research to assist CH professionals develop initiatives to support communication between museums/heritage sites and their different audiences, making themselves open and accessible to all. It focuses on specific types of audiences, but also revolves around other issues such as Cultural Heritage Management, Collection Management, Intellectual Property (IP) Management, Environmental Concerns and Climate Change, New 'Business' Models and Financing, Marketing and Branding, as well as Audience Development.

2.1 Reaching Younger Audience

CH professionals are particularly eager to make CH more relevant and attractive to young people. This category includes many adolescents and children in developed countries who are considered digital natives and use computers, social networking services, and text messaging as their main means of communication and learning.

Recommendations

- **Understand** young audience in order to determine their specific needs as well as to better understand how they perceive CH, how they experience it, how they want to engage with it, and what is important to them. This can help renew the current view of CH and establish a new relationship based on collaborative and strong interaction, fostering innovation. To gain more knowledge about young audience it is necessary to undertake some research, consult, listen, analyse, and respond. In this respect, it is important for CH organisations to set out an **audience development plan**. A recommended tool is **audience segmentation** that involves thinking about audiences as distinct groups (e.g. social media campaigns to collect their views, etc.). For instance, understanding the behaviour of the emerging of digital natives is important: they consume fast, in visual formats, they choose their content. Primary research, secondary research, quantitative research, and qualitative research, are important approaches that could work together.
- **Promote real-time dialogue between young people and the CH professional**. Give young people space to reflect on the whole idea of what heritage is and become part of the dynamic process of shaping information about heritage. A recommended tool is to create chat rooms for discussions between young people and CH professionals on the organisations' websites or interact with them on social media.
- **Introduce seminars, games, and digital tools** (Augmented Reality/Virtual Reality/Mixed reality, Gesture Technology/Non-touch Interactives, Haptic technologies, Mobile Technologies, Virtual touring, etc.) in museums and heritage

sites to attract younger audiences. As evidenced by the visitors' survey conducted by the ReInHerit project, young museum visitors (18- 29 as well as 30-44) are more likely to use digital tools in a museum environment and are thus more positively inclined towards using the digital tools the ReInherit project will be offering and the Digital Hub. Younger people in general have a strong tendency to be interested in technology related experiences and in gamification approaches.¹²

- **Foster synergies with other CH organisations and sites** to develop maker-space environments and travelling programs to build new relationships with young people using new technologies.¹³
- **Train CH professionals** in audience research, marketing, and communication (e.g., social media), in order to better understand and approach young people, lifting the barriers that prevent them from engaging with CH. It is important to convince the staff of museums and heritage sites that young audiences are relevant for their work and that it is worth developing a mutual understanding.
- **Design and implement outreach work/activities to schools, universities, and youth organizations** in order to educate youth before they come to the museum or create the desire for them to visit the museum and the heritage site. It is important to bring schools/universities and museums/heritage sites together in a context of a fruitful interaction.
- **Make the learning material more memorable** with a creative storytelling approach and inspire children to pick up an interest and learn more.
- **As an educational tool, digital services can make abstract concepts more concrete** so that visitors can visualize and understand them, especially children. An example would be to educate them on curators' methods. This would help them to reflect on historical stereotypes and would involve them in co-creation.
- **Promote dialogue and collaboration between CH professionals, schoolteachers and university professors** in order to develop a common strategy on how young people should be connected to CH.
- **Involve people who are working with music, sound and acting to create new language for communicating with digital natives.** This very much changes the perspective and can help professionals understand different formats of communication.
- **Explore new funding opportunities** to engage young audience.

2.2 Engaging audience of all ages

Although the young audience seems to be one of the most desirable target groups for CH professionals, it is equally important to maintain and increase the visitor base of CH organisations across all age groups (e.g., 65+). As such engaging existing or new audience of

¹² For a case study that examines how games have the potential to engage new audiences with museums, heritage sites and history see "CASE STUDY 1: RoMinecraft: Reconstructing Roman heritage in Minecraft" in Chapter 3 of this booklet.

¹³ In Chapter 3 of this booklet a best practice is presented on how technology can potentially facilitate collaborations amongst different museums (CASE STUDY 3: Matters in Media Art: Looking after time-based media art).

all ages should be the starting point in the process of audience development. As evidenced by the visitors' survey conducted by the ReInHerit project, young audiences are the most likely to be interested in using digital tools; however, it is equally significant to ponder how we can market these tools to all age groups.

Recommendations

- **Refresh the offer** by providing something new and exciting that is **worth a return visit**. Activities: Organising events programmes that target your different audiences, set a specific time limit for holding temporary or visiting exhibitions, acquire new objects to the existing collections, promote an exciting 'object of the month' to entice visitors to learn more.
- **Maintain a relationship with the audience at a regular base**. Use social media and regular email newsletters in order to build a two-way conversation with the audience.
- **Promote membership schemes** in order to foster loyalty and ensure return visits.
- **Have different kinds of tools to address different needs** (for instance visitors 65+ still prefer audio guides).
- **Make your offer visible to potential visitors** (aware).
- Help visitors to get to, find the organization and welcome them to facilities (**journey and arrive**).
- Provide them an **enjoyable and meaningful experience** through your cultural offer (enjoy).
- Offer them a **visitor's experience of leaving** (departure).
- Ensure that the experience will **continue after the visit** (memories).
- **Develop dynamic exhibits that make visitors feel part of what is happening on site**.
- **Allowing people to touch the artefacts** enables a connection as they feel the object without a mediator. This creates new important values.

2.3 Engaging cultural tourists

As evidenced by the primary research conducted by the ReInHerit project, there is a clear distinction between local vs global audience due to the growth in digital tools and digitalization of content, but also due to the dependency on tourism and the lack of local audiences. It is important for museums and heritage sites to redefine their relationship with cultural tourists (digital or physical) on a more sustainable basis. If the COVID-19 pandemic situation continues and museums and heritage sites will be subject to lock-downs again, it is important to reach all audiences through digital means.¹⁴

Recommendations

- **Adopt hybrid models when engaging your audiences**, offering experiences on-site and in virtual museum and CH site environments.
- **Translate interest in CH into products and service offerings** that appeal to cultural tourists. **Training in branding** is important.

¹⁴ For an interesting case study on cultural tourism representing a best practice for engaging different audiences, such as tourists and young people, through technology see "Appendix" of this booklet.

- **Harnessing technology** makes cultural tourism more competitive. It is important to diversify cultural tourism products. Create new experiences, services, and niche cultural products with the application of new information and communication technologies (ICT) for the development of smart tourism. Synergies with other CH organisations and sites to create cultural routes, creative tourism experience, etc.
- **Promoting stronger synergies** today will strengthen the cultural tourism of tomorrow. Collaboration between decision-makers, professionals and different stakeholders, in particular joint activities between entrepreneurs, public bodies, municipalities, tourism associations, cultural partners, local communities, and the business community. There is a need all parties involved to agree and act upon a shared vision for their cultural destination and enhance competitiveness. A priority should be placed on the empowerment of women, youth & indigenous peoples, groups that are heavily affected by the COVID-19 outbreak.
- **Exchange of good practices and lessons learned.**
- **Collaborations and alliances between countries and international organisations** (e.g., UNESCO, UNWTO and OECD) to support and strengthen regional initiatives in cultural tourism. For example, UNESCO has increased work in cultural tourism (surveys, reports, etc.), in an attempt to support its Member States and strengthen regional initiatives.
- **Develop indigenous tourism** (indigenous arts, handicrafts, culture, and traditions).
- **Shift from quantity towards quality.** Emphasis should be placed on qualitative indicators and visitors' profile as well as on resilience policies, new priorities with the new measurement values, and tailor-made marketing strategies. Cultural tourism can be offered from an innovative perspective that adapts to the taste of each visitor.
- **Fostering community-based tourism through living heritage.** Raise awareness of the important role of communities and cultural practitioners and their living heritage on the sustainable development of tourism. Ensure that communities and practitioners are main beneficiaries and have a leading role in tourism management. Develop community-centred tourism initiatives that actively engage practitioners of local and traditional knowledge. Actively involve communities and cultural practitioners in tourism strategies and management planning.

2.4 Bridging Museums/Heritage sites and Local Communities

As discussed above, local communities are considered as a key stakeholder in the CH sector. Establishing a deep connection, relationship and mutual understanding with their local communities should be a core activity for museums and heritage sites. It is clear that community support is of vital importance for the sustainable management of CH and the survival of most of the CH organisations around Europe.

Recommendations

- **Adopt the perspective of the understanding and participatory museum** with a horizontal approach to interaction.
- **Train CH professionals in marketing and communication.**
- **Train in how to engage local populations** in order to connect collections and themes to a local context. The goal is to provide added value.

- **Promote membership schemes** in order to foster loyalty and ensure return visits. In addition, associations of Friends of Museums create links between museums and the communities.
- Make CH organisations' offerings relevant to local visitors by **involving locals and including locally significant themes**.
- **Connect CH organisations to schools, universities, community organisations, etc.** (launch off-site programmes).
- **Collaborate with local authorities and policy makers.**
- **Make the local community, co-creator of thematic exhibitions** related to locally significant themes.
- Organize **special events in non-working hours**, during the evening or at night, because locals work during the day.
- **Expand the opening hours of the CH organisations** to make them accessible to local people who work in the morning.
- **Translate interest in cultural heritage into products and service offerings** that appeal to local and global audiences. **Training in branding** is important.
- Make CH organisations more relevant and appealing by bringing in **activities from the creative sectors** – dance, art, music and themes from everyday life, street culture.
- Museums need to change their role to become the catalyst of conversation at cultural level in communities. This includes embracing new challenges, which requires preparation and training of the personnel.
- **Work with communities** before and during the prototyping of tools.
- **Use of social media and technologies.**
- **Exhibition advertisements.**
- **Use creative museum marketing ideas.**
- **Tell the history** in a way that is **relevant** to the local community.
- **Engage volunteers**, create the sense that museums and other cultural organisations or sites belong to the local communities and work in partnership.
- **Give audience a role in the decision-making process** of museums and other cultural organizations or sites.
- **Organise community-curated exhibitions.**
- **Invite local collectors to display their own collections** in the way they want to.
- **Give floor to local interest groups** to present their own topic, providing new interests and variety for the visitors.
- **Invest to community engagement programmes, projects and services** aiming at encouraging engagement with local audience
- **Fill historic gaps** in the collections or histories.
- **Become a communal reflection space** (e.g., ask from communities for photos of any subject and create an exhibition).

- **Highlight under-represented voices.**
- **Translate maps, promotional materials, educational guides, and exhibition labels** into the languages spoken in the local communities.
- Engage the local communities **in telling their own stories.**
- **Adapt general practices and policies to local needs**, in an attempt to promote and enhance local cultural assets. Develop a clear plan of action relevant to local circumstances.
- Develop tools to help professionals run **workshops with audiences** to find out their needs/what is important to them in the local context.

2.5 Social Inclusion

As a response to the pluralistic and diverse societies, CH organisations need to engage more with social inclusion and integration. They should act as participative spaces that encourage involvement from all social groups and understand integration as a two-way process. CH organisations must be relevant to all types of audiences, from all socio-economic groups and ethnicities, genders, ability levels, such as Minorities and Indigenous Peoples, Special Needs Groups and so on.

Recommendations

- **Provide a truly immersive experience for all**, including users with disabilities, minorities, people from an immigration background, people who are unemployed, people who are economically or geographically disadvantaged, etc.
- **Involve indigenous peoples as key stakeholders** in the management and presentation of their tangible and intangible cultural heritage.
- **Develop indigenous tourism** (indigenous arts, handicrafts, culture, and traditions).
- Tell the history in a way that is **relevant to minorities and Indigenous peoples.**
- Emphasise on the implementation of technologies to **create more accessible atmosphere for disabled persons.** Promote **multisensory museum experiences.**
- **Opportunity to challenge dominant narratives and bring silenced narratives to museums** (e.g., ‘Black Lives Matter’ and ‘Me Too’ movements). Enables the sector to reach groups that are not part of the official museum narrative by going into the streets and bringing everyday life issues into the museums.

2.6 Cultural Heritage Management Plan

Management planning (including the management plans produced in this respect) is increasingly gaining recognition throughout the world as a strategic and operative tool concerning the protection and enhancement of cultural heritage. Each CH organization, site or protected area need to set up a Cultural Heritage Management Plan. The overall objectives of the Cultural Heritage Management Plan are a) to protect the values of the cultural heritage for present and future generations, and b) to promote effective sustainability practices. A wide range of recommendations are available to accomplish the goals of the CH Management Plan and ensure its effective implementation.

Recommendations

- Setting up strategies accompanied by clear policies, guidelines, and possibly a road map on strategies implementation and resource allocation can facilitate the success of CH Management process. Some examples are:
 - A **Communication strategy**, specifically social media policies, must be agreed and adopted. It is important to acknowledge the different demands of internal and external information-sharing and must be regularly tuned to meet changing needs. Various communication tools, some of them borrowed from other sectors, can facilitate the effective implementation of the CH Management Plan.
 - An **Intellectual Property strategy**, with an emphasis on copyright, reinforces cultural heritage as an asset, ensures that no third-party IP assets are infringed, and contributes towards the effectiveness of the CH Management Plan. As WIPO has convincingly argued, copyright protection is above all one of the means of promoting, enriching, and disseminating national cultural heritage.
 - Finally, setting up an **Environmental strategy** is also important in order to create an effective policy framework for decision-making and implementation in relation to environmental and cultural heritage sustainability.
- To ensure the effectiveness of the CH Management Plan, a wide basis of **professional and scientific knowledge and skills** are required. The operation's responsibility is to train and induct all employees in cultural heritage matters so as to avoid mistakes and failures in the implementation of the CH Management Plan. Training gives heritage practitioners the opportunity to increase their operational efficiency and the effectiveness of heritage management practice. In this respect, tools such as marketing plans, business plans, strategic plans, project management software helps practitioners to work more efficiently. Furthermore, cultural awareness training is a process that can inform and educate people about key issues related to cultural heritage with the intention of influencing their attitudes, behaviours, and beliefs, towards the achievement of a defined goal. This can, subsequently, facilitate the success of the CH Management Plan.
- **Setting up organograms** is also important in order to show hierarchical relationships between managers and the people who report to them, as well as departments. In addition, effective implementation of management planning also depends on coordinating the contribution of all relevant stakeholders and this requires particular skills.
- **Evaluation process** is also of paramount importance for the successful implementation of the CH Management Plan. It concerns self-evaluation and external evaluation that should take place on a regular basis. Furthermore, monitoring is an important instrument of reviewing given the fact that when a CH Management Plan comes into practice changes must be expected.
- Due to its interdisciplinary nature, the CH Management must be based upon **effective collaboration and communication between professionals from various disciplines**. Synergies and networks may be valuable in this respect. It also requires the involvement of government authorities, academic researchers, universities, research institutions and the general public. Effective implementation of management planning largely depends on supervision by an interdisciplinary team of specialists

relevant to the problems being addressed. This team can deliver appropriate responses to emerging needs during implementation.

- **Digital technologies** offer solutions to successfully implement a CH Management Plan. For example, the use of innovative tools can facilitate the targeting of audiences and the understanding of their needs (e.g., tourists, younger audience, local communities, minorities, Special Needs Groups).
- **Implementing codes of conduct** can ensure that any targets are pursued, and any tasks are implemented considering ethics and deontology.
- **Hybridisation of roles** within organisations of the sector, (e.g., collection's manager working also with outreach activities).
- **Use of existing programs for CH professional** (e.g., 'Erasmus programme' for professionals).
- Schemes/systems to make professionals **change roles within & between organisations** to provide new perspectives and develop innovation capacity.
- **Intra-museum collaboration** as a means of **developing niche or audience specialization**.

2.7 Collection management

A key issue for CH organisations of all sizes and types is the proper management of their collections, regardless of whether their collection is small or large, public, or private. Since collections' management is a quite broad topic, particular emphasis is placed on aspects, such as due diligence, provenance search, restitution/repatriation claims and, digitization of the museum's collections.

Recommendations

a. Due diligence

- **Verifications concerning the price of the object and the identity of the seller.** Require donor/vendor (or their representative) to verify the market price, to provide his name and address, his qualification, and the reliability of his organization, as well as to sign and date a form identifying the item for sale and confirming that the item is the unencumbered property of the donor/vendor, who has authorized the representative to sell or donate it. This information will help the purchaser decide whether the vendor/donor's story is convincing.
- **Check the provenance of the item.** In cases of acquisitions, it is necessary to ask the donor/vendor for a complete documented ownership history of the object ideally dating back from the time of its creation/excavation/discovery. Some reliable evidence are export licence from its (actual) country of origin (and not solely from the last country where it was found); Publication in a reputable source, or at a date that proves its legitimate subsequent permanent export from the country of origin; Photographic evidence; Family correspondence; Auction catalogue; Excavation field notes, etc.
- In the case that the donor/vendor/lender is not able to provide acceptable documentary evidence of the object's provenance or there are areas where there is doubt, then the organisation needs to **undertake independent due diligence with**

strict commitment to high ethical standards. It must be able to establish where an item came from, and when and how it left its country of origin and any intermediate country, how it was acquired (identify the chain of transactions), before deciding its course of action. Important steps that are needed to be taken are:

- A thorough physical examination of the object at first hand (if this is possible) to determine if the object has been illegally excavated, restored, taken from a larger item, from another collection or a storage room. Otherwise, inspect detailed descriptions and photos to assess its physical condition and authenticity.
- A consideration of the type of item and the likely place of origin, given the fact that there are certain areas subjected to illicit traffic, such as Afghanistan, SE Asia and Iraq. The ICOM Red Lists may facilitate this stage of research.
- Taking advice from specialists from several individuals, institutions, or organisations, depending on their field of expertise about the object's category: experts, museums, universities, embassies, ICOM, UNESCO, national authorities, legal advisers, etc. They can provide reliable information about geographical areas, particular types of items and possible sources of evidence of provenance, especially in problematic cases.
- A thorough examination of further sources, such as museum records, exhibition catalogues, auction catalogues, other published sources, family/friends of donor/lender for information, and other databases and digital apps of stolen cultural objects, such as the IDArt Mobile App provided by The International Criminal Police Organization (INTERPOL).
- In case the object may have been stolen, it is recommended to check the information following the standard record "Object ID" against other databases of stolen objects, such as the INTERPOL database mentioned above.
- Check whether the export of the item was in accordance with the legal framework of the country of origin (ratification of international conventions, bilateral agreements, and national legislation), and other cultural property legislation applicable at the time the item was exported.
- Contact the country of origin of the object to find out whether it has left the country legally as well as for any other additional information.
- Assessment of the chain of transactions (by also reviewing the relevant accompanied documentation) provided by the vendor/donor/lender.

b. Provenance research

- Conduct provenance research for collections to maintain the CH organisation's credibility and ensure that it operates in an ethical and moral environment.

c. Dealing with restitution/repatriation claims¹⁵

- **Collaborate with governments, law enforcement agencies, and antiquity dealers.**
- **Be aware of local, regional, and international laws.**

¹⁵ The second case study presented in Chapter 3 of this booklet (CASE STUDY 2: Digital technologies and the repatriation of the Killer Whale crest hat) explores how technology can aid the repatriation of contested museum objects and can also constitute the basis for the development of collaborative projects between the involved museums and local communities.

- CH organisations that have received repatriation claims should deal with them in an **informed and responsible manner avoiding conflicts and tensions**. The opposite contradicts the organisations' mission and vision while it also adversely affects their profile and role within the constantly changing modern world. Organisations should foster a fruitful and trusting dialogue as well as a mutual understanding with claimant communities. Regardless of the results of the claim, this process should be able to develop sustainable relationships between communities, cultures, museums, and other cultural institutions.
- CH organisations to which claims are addressed should design **effective strategies taking into account the particularities of each repatriation/restitution claim**.
- Practices that are followed in those cases are:
 - Negotiations/bilateral agreements between governments
 - Negotiations between the organization and the claimant
 - Legal enforcement by courts or governmental agencies
 - Adoption of Special Laws or Unilateral Decisions
 - Voluntary returns by institutions or individuals
 - Repatriation within a country
 - Restitution Accompanied by Cultural Cooperation Measures
 - Compensation or compromise agreements by museums and other cultural institutions
 - Buying back at auction or return through auction houses
 - Arbitral awards or mutually agreed mediation and conciliation outcomes
 - Formal recognition of the importance to cultural identity upon return/restitution
 - Loans (short-term, long-term, perpetually renewable)
 - Donations
 - Setting up special ownership regimes (joint ownership, trusts, sharing of exhibition times between the institutions, retain ownership and allow possession, etc.).
 - Exchange
 - The production of replicas (e.g., by 3DE printing) for the institution that conducts the return

d. Digitising the museum collections

- CH organisations should be **well-informed of the network of supportive national, regional, and international organizations** (via communication strategies, conferences, etc.).
- **They should be considered and treated as enablers of innovation in funding policies that target the digital transformation in general**. They can benefit from the EU's planned funding programs such as Horizon Europe, Digital Europe, the Investment EU Program, and the European Structural and Investment Funds.

- **Create digital services with AI** that a) go beyond the stage of the visit at the museum site but create a follow-up of the visit as well as b) produce live experiences by which exhibitions interact with visitors and amplify their emotions.
- **Develop digital services** by which visitors can interact with artefacts and -based on them- create something of their own imagination.
- **Start being visitor oriented** and develop digital services that enable the conversation between museums and audiences such as Apps that invite people to share their experience, narratives, and point of views.
- **Having tools that are user-friendly** or having user information in order to be able to pair-up the different kinds of interests and needs of the users.
- **Familiarise the museum personnel with technologies** and make them aware of the opportunities offered when they interact with tech experts.
- **Create networks between museum and tech professionals** to develop open/interactive experiences and communication guidelines.

2.8 Intellectual Property (IP) Management

As becomes evident from the outcome of both the primary and the secondary research, museums, cultural heritage institutions and cultural heritage sites need to be aware and take into account IP issues, especially concerning the digitization and exploitation of the items in their collections. The increasing use of new technologies such as virtual and augmented reality, gamification, immersive performances, and so on, make this need even more imperative. IP works both as a shield and as a sword in the sense that it allows the organization to protect and exploit its intangible assets, prevent them from being copied or reproduced in any manner or form without its authorization and at the same time prevents the organization from copying third parties' works/subject matter that may expose it to unnecessary claims and litigation as well as impinge on its image. Here are some guidelines that an organization should consider when engaging into its everyday routine and seeks to serve its aim and purpose.

Recommendations

- **Set up an IP Inventory and perform an IP Audit.** This will help the institution a) to identify its intangible assets and in this way realise how much of the necessary rights (e.g., in its collections) it has acquired (which also means what further needs to be acquired) and b) to make provision as to how not to infringe third party IP rights and escape liability.
- **Set up an IP Policy.** This will assist its personnel to deal with IP issues in a principled manner. It usually takes the form of principled statements that work as guidelines to the institution administrators faced with decisions that involve IP issues such as ownership and use of self-generated IP, terms of acquisition of collections, use of trademarks and logos, terms of donations, online licensing, etc. The IP Policy may also contain due diligence steps and 'safe harbour right statements' to avoid liability.
- **Draft a Licensing Strategy.** If the institution decides to engage in commercial/profit-making activities, it needs to follow a licensing strategy identifying objectives and revenue streams. This strategy may implement in more detail aspects of the institution's IP Policy such as the charging of visitors for guided tours, taking pictures,

videos, etc; the operation of an (e-)shop with products incorporating the image/design of items in its collections; the use of images/photographs of items in its collections by private parties, companies, other institutions, online platforms, etc; the use of its trademarks and logos; the renting of its premises for conferences or other events; the running of a restaurant, a café, etc.

- **Go digital and adopt new business models** taking into account IPRs' challenges in terms of protection and management. This is a way to keep up with the general pace and the augmenting needs of offering as much as possible to the public without the constraints of time or geography. Examples are the digitization of collections, the offering of virtual tours, the maintaining of a website with pictures and information, the use of gamification, immersive performances, virtual or augmented reality, and so on. In these cases, Technological Protection Measures (TPMs) and Rights Management Information (RMIs) may be of assistance as well as clear, simple, and consistent Terms and Conditions, where users/visitors/consumers have easy access to the services and a clear idea as to what has been agreed or authorized between the parties.
- **Create an IP culture.** This helps implement an IP Strategy or an IP Policy. An IP Policy should aim at the cultivation within the institution of an IP Culture where all employees are informed/educated/trained as to how to deal with creative content (generated within the organization, outsourced, or belonging to third parties) and be aware and motivated to apply the institution's IP Policy concerning their part of work or role.
- **Make provision in case of disputes and how best they can be resolved.** The institution needs to take decisions about the resolution of disputes whether, for example, it will resort to litigation or to Alternative Dispute Resolution (ADR) (arbitration, mediation, conciliation, negotiations, etc.). Dispute resolution may be part of the institution's IP Policy so that there is a uniform stance as to how one handles such situations.

2.9 Environmental Concerns and Climate Change

Modern world is currently facing a climate crisis and a pandemic, which are radically changing human lifeways and ecosystems. The EU recognized climate change as an emergency, a systemic problem that needs to be addressed in all sectors. A crucial issue of CH organisations' commitment towards society is related to climate and environmental concerns. They need to support improved solutions and new approaches for environmental sustainability. In this respect, energy management is important in order for CH organisations to operate in a more 'eco-conscious' manner. Central to this discussion is the concept of energy efficiency, environmental sustainability or green museums.

Recommendations

- **Adopt a broader view founded on realistic thinking.**
- **Disseminate a culture of environmental sustainability, climate change and justice.** CH organisations and sites as educational bodies can include in their mission to convey the important message of environmental concerns so as to inspire people and activate individual and collective agency. They can raise awareness and practices responses that can be useful not only on local but also on global scale. They can help local communities in particular to understand the impact of climate change on their lives.

The intensity of the message depends on the specific features of each museum, cultural institution and site (type, size, collection, funding support, etc.).

- **Create collections, exhibitions, and education programs** as well as undertake a variety of campaigns and community engagement activities (e.g., indigenous and traditional populations). These activities can be used as a vehicle to:
 - raise awareness
 - inspire climate action
 - build and share knowledge about human impacts on environment and climate as well as teach skills
 - co-create positive responses
 - foster community discussions that help communities craft better carbon-reducing approaches for energy, water, waste, and infrastructure
 - help local communities plan to become more climate-resilient
- **Find new ways of telling the story of their locals, their places, and people.** These stories should be in context with what modern world knows and experience today.
- **Redefine and expand their definition of knowledge.** They need to exploit local and indigenous people's understanding, skills and philosophies that have been developed during their long interaction with their natural environment. This, on the one hand, will facilitate CH organisations and sites to inform decision-making about environmental issues. On the other hand, it will help them to achieve, what has already been discussed in the previous chapter, i.e., the local communities' engagement.
- **Engage artists and designers** to find more creative responses to climate crisis and propose solutions for how humanity might shape the future.
- **Conduct climate related research** (community-based for action, audience-focused for heightened awareness and engagement, or technologically innovative for problem solving).
- **Reduce energy consumption.** Determine institution's annual carbon footprint.
- Arrange for an **energy audit** from their utility.
- **Stop promoting single-use plastics** and select goods and materials with low environmental and climate impacts.
- **Good ventilation.**
- Lights, unnecessary computers, printers, and laboratory equipment **should be turned off overnight** and when not in use during the day.
- Replace dead light bulbs with energy-efficient alternatives in needed places. Use also natural light.
- Use air-conditioning less.
- All printers should be default set to print on both sides of the paper and reuse paper when possible.
- **Increase electronic communication.**

- **Institution should regularly conduct an energy audit.** The energy audit should be regularly analyzed to determine the carbon footprint of conservation activities. As a response to the energy audit recommendations the museums can set an action plan.
- Rinsing treatments should be revised to assess water flow, duration, and potential for reuse of rinse water. Use sensors and low-flow fixtures for fixtures, gray and black water reuse practices, and rainwater harvesting.
- Temperature settings should accord to human comfort.
- **Environmental standards for collections** should be reviewed to identify potential energy savings.
- Timers or motion sensors for lights should be placed where possible.
- Adaptations should be made to the building to reduce energy loss, such as insulation and draft reduction.
- Alternative sources of green energy production and heat generation should be regularly explored.

2.10 New ‘Business’ Models and Financing

In recent decades a series of parameters, has resulted in considerable cuts of private or public funding and support for CH organisations and sites. To deal with this situation, the entire CH sector has found itself in the challenging position of exploring new ways of management and financing as a way to reduce its dependence on public grants. In recent years, the need for finding new business models and funding systems becomes more urgent. Given the fact that challenges will become greater in the coming years, CH organisations and sites are called to develop new behaviours so as to achieve sustainability and resilience. They are encouraged to rethink and explore new ways of how they can operate and create value as well as how they can enhance and transform the way they are managed. It is crucial for them to understand how they save costs, increase revenue, and achieve financial sustainability, while, at the same time, it is necessary for them to remain faithful to their vision and mission and not be obliged to adopt (unless they choose) for-profit values.

Recommendations

- **Develop feasible targets in order to achieve growth and sustainability.**
- CH organisations should **clearly state their mission and identity, including their financial objectives.**
- **Develop appropriate business goals.** However, in order to meet those goals, it is important for CH organisations to have all necessary resources. The business goals can be divided into economic and psychological (i.e., increasing brand awareness, changing customer perception, augmenting customer satisfaction, etc.).
- **Give their products and services attributes** that are attractive and meaningful to their audience.
- **Diversify the sources of income.**
- In parallel to their core services (e.g., exhibitions) they should **include added services** (e.g., cafes, museums shop, e-shop, etc.).

- **The users of the cultural services cannot be considered as ‘normal’ customers but instead as ‘lovers’ of specific cultural services.**
- **Use more participative approaches to audiences/visitors** so as to reach a wider audience.
- **Use new technology-driven business approaches** that are better perceived by young people.
- **Use networks of partners.**
- **Sales of museum-related products.** Museums need to move away from souvenir-focused projects and create products that represent creative ways for audiences to engage with museum collections beyond their walls.
- **Sales of digital content, stories, and experiences.** Museums need to shift digital storytelling techniques moving to more dynamic forms of digital creation for which visitors are willing to pay (narrative-driven content, bespoke curator tours, live events like virtual escape rooms, etc.). At the same time, they need to find methods to commercialise such content.
- **Build digital monetisable communities, i.e.,** digital membership schemes that provide a sense of community (exclusive access to content, involvement in the material created, etc.).
- **Museums could strategically use NFTs** as a way to present works that cannot be displayed in the physical world.

2.11 Marketing and Branding

CH organisations and sites are increasingly pressurised to generate income, whilst their budget is decreasing (due to budget cuts either from the government or from their board of trustees). To this the price increase must be added, especially with regard to energy, due to the war in Ukraine. At the same time, they are called to promote their ‘brand’ and develop marketing tools. This chapter aims to assist cultural heritage professionals in the challenges they face in the development of strategies in order to secure long-term financial stability for their organisation.

Recommendations

- **A thorough understanding of the character of the CH organization or site** (mission, vision, history, principles, etc.).
- **Train CH organization staff on marketing and branding strategies.**
- **Understand the different audiences** and what benefits they seek.
- **Segment the identified target audience** so as to understand the requirements of each group.
- **Conduct marketing research.**
- **Communicate brand accurately and specifically to target segments,** building relationships with them.
- **Collaborate with external experts to manage branding museum process.**

- **Engage in alternative income generating enterprises**, such as membership programs, merchandising, licensing, franchising, and donations. Collaborate with major museums that have successfully marketed and branded themselves as best practices in the CH sector.
- **Develop strong brand images** that are easily recognizable and highly regarded by visitors.
- **Translate interest in cultural heritage into products and services** that appeal to local and global audiences.
- **Communicate with other authorities to make everyone aware of what museums do.**

3. Case-studies on CH Management and European cooperation

Introduction

This chapter explores three case studies of best practices relating to how technology can potentially facilitate collaborations between museums and heritage sites (see case study 1), between museums and communities (see case study 2), and amongst different museums (see case study 3).

The first case study examines how games have the potential to engage new audiences with museums, cultural heritage sites and history. More specifically, it highlights the project “RoMinecraft”, a project which uses the hugely popular game Minecraft in order to reconstruct and discuss Roman heritage in the Netherlands. The second case study explores how technology can aid the repatriation of contested museum objects and can also constitute the basis for the development of collaborative projects between the involved museums and local communities. The case focuses on the repatriation of the clan Killer Whale crest hat from the Smithsonian National Museum of Natural History in the US to the Tlingit native community in Alaska, and the creation of an exact replica through 3D technology for replacing the returned original in the museum. Finally, the third case study demonstrates how museums are sometimes “forced” to collaborate in order to face the challenges of new technological advances. The project “Matters in Media Art” is a joint initiative between the New Art Trust (NAT), the Museum of Modern Art (MoMA), the San Francisco Museum of Modern Art (SFMOMA) and Tate, aiming to assist anyone involved in collecting and acquiring media artworks and fostering the development of shared handling and preservation practices.

3.1 CASE STUDY 1:

RoMinecraft: Reconstructing Roman heritage in Minecraft

Abstract

A number of museums have used games, and more particularly the hugely popular digital building game *Minecraft*, as a point of entry to collections, and as a way to provide educational experiences in a fun and engaging way. Our case study here is the project “RoMinecraft” (2018), which uses *Minecraft* in order to reconstruct and discuss Roman heritage in the Netherlands. The project, developed and executed by the VALUE Foundation, consisted of a number of public events in museums and municipalities where the public could receive instructions on how to recreate existing or lost Roman cultural sites. This case study is an innovative example of a bottoms-up approach in which specialists (in this case archaeologists and game lovers) help people of all ages to rebuild the past through gaming. It also reveals the advantages of exploring heritage sites through gaming: increased engagement (especially when it comes to children and youth), collaboration between users, and learning through playing. However, it also highlights some challenges and raises important questions: Can video games provide an accurate representation of the past? Is it necessary to do so? What is the relationship between authenticity and play? And, what is the role of “counterplay”?

3.1.1 Context: Museums and Minecraft

In the last few years, museums have been experimenting with serious games – that is games that have, beside entertainment, a purpose to promote learning and behavior change – in order to provide educational and fun activities for mainly younger audiences and to complement or augment museum experiences. Some of the reported advantages of serious games for museums and cultural heritage sites are: (a) positive effects on learning, (b) users are motivated and engaged in a stimulating and fun environment, (c) serious games can be collaborative and can encourage teamwork amongst users, and (d) they can enhance creativity (Ćosović & Ramić Brkić, 2020; Anderson et. al., 2010). However, the same games might also have some disadvantages such as a decrease in user attention span, a quite high cost for their creation, and difficulty in evaluating the outcomes of the interaction with the game (Ćosović & Ramić Brkić, 2020). For this case study we focus on the use of a collaborative, creative game platform – *Minecraft* – that has recently been used by museums and heritage sites to promote learning, interaction and collaboration.

Minecraft is best described as the LEGO of the video gaming world because it provides players with various block material, which they use to build whatever they wish. This hugely popular digital building game has two modes: the *survival mode* where the player needs to survive in a location with threats, and the *creative mode* where players can have limitless access to building material to create. It is the latter mode that most museums use to recreate historical sites/events or even a digital version of the museum and its collections.

A number of museums have used *Minecraft* as a point of entry to their collections and as a way to provide educational experiences in a fun and engaging way. One of the most successful uses of *Minecraft* was employed in 2016 by the Museum of London to mark the 350th anniversary of the London fire (see Image 3.1.). According to the Digital Learning Coordinator of the Museum, Joashua Blair (2016): “The Museum of London has worked with some of the world’s best *Minecraft* professionals to create these maps, combining our knowledge and collections with their creative minds to bring history to life.” The Museum had to work closely with *minecrafters* to build a detailed virtual model of 17th century London and then offer users three maps entitled “Pre-fire London”, “The fire” and “Rebuild London”. In effect, the maps provided users with the tools to uncover the causes of the fire, help fight it, and try rebuild the city. The maps can be downloaded from the museum’s website and used on users’ devices.



Image 3.1. "Screenshot from The Great Fire of London, Minecraft, courtesy of The Museum of London"

A few other museums, such as the de Young Museum, the Victoria and Albert Museum, the Tate¹⁶, and the British Museum, have used *Minecraft* to engage new audiences (for short descriptions of these uses see Charr, 2021). For the purposes of this case study, we have selected an example of *Minecraft* use that attempts to connect cultural heritage sites with other institutions such as museums.

3.1.2. Case Study Description

The selected case study is titled "RoMinecraft" and uses *Minecraft* in order to reconstruct and discuss Roman heritage in the Netherlands (see Politopoulos et al., 2019; Politopoulos & Mol, 2021; ROMEINCRAFT). "RoMinecraft" was developed and executed in 2018 by the VALUE Foundation and aimed to examine how video games can be used to create accessible and participatory engagement with the past (see Image 3.2.). It particularly aimed to "raise awareness of existing or lost Roman heritage in the Netherlands, and particularly the Dutch Limes, through the reconstruction of Roman cultural heritage sites" (Politopoulos & Mol, 2021, p. 88). The game *Minecraft* was selected for this project because of its simplicity – anyone can start building by placing one block on top of the other – and because its commercial success meant that a large audience was already familiar with the game (Politopoulos et al., 2019).



Image 3.2. Screenshot of the reconstructed fort Matilo in *Minecraft* that had been built over several *RoMinecraft* events held in Leiden, 2017. In Politopoulos et al., 2019.

The team designed scaled maps of the Netherlands (ranging between 1:2 and 1:4) for *Minecraft*, while the actual location of the Roman forts was scaled 1:1 to make building simpler. Apart from the online maps that one could download from the project's website, a number of public events were organized in museums and municipalities where the public could receive information on how to re-create existing or lost Roman cultural sites. To aid the

¹⁶ Tate was an early adopter of Minecraft with "Tate Worlds" launched in 2015.

building at the different public event sites, the team made available computers and supplementary material with historical and archaeological information about how the specific forts looked like. The events gave participants several choices on how they wanted to engage with the game. They could (a) actively build on computers provided at the events or on their own computers, (b) observe the building process on screens at the site, or (c) immerse in a virtual reality scape with the help of a head mounted device where they could explore the site as it was constructed.

The case study reveals the perceived advantages of exploring heritage sites through gaming: increased engagement (especially when it comes to children and youth), collaboration and learning through playing. Furthermore, apart from the collaboration amongst online users, the organizers observed that parents would plan the construction with their children (Politopoulos et al., 2019).

3.1.3. Issues at stake: authenticity and play

One of the issues that arose from this case study is the question of authenticity and play. As in the case of all serious games, the creators of “RoMinecraft” placed a great emphasis on designing accurate maps and providing precise archaeological information for users. Users received booklets with archaeological and historical information, detailed building plans, photographs of reconstructions, etc. The creators also provided rulers and assisted with calculations for more precise reconstructions. This information was intended to help users to (re)build a more or less accurate model of Roman heritage in the Netherlands through play.

On the other hand, the game itself encourages creativity, play and having fun. In the creative mode of *Minecraft*, users have unlimited freedom to move around and build whatever they want. They can choose to faithfully follow the instructions and information provided by “RoMinecraft”, alter them, ignore them, or even engage in “counterplay”. For example, next to the fort of Matilo one can find a polar bear (see Image 3.3.), an animal that could not have existed site by site with this fort. This is an inaccurate representation of the past, albeit a playful and fun one. Other “counterplay” actions were also observed, such as alpacas, a farmhouse entirely built with diamonds, or even a functional rollercoaster in one of the Roman forts.



Image 3.3. Screenshot of a not-so-historically-accurate Roman polar bear in fort Matilo. In Politopoulos et al., 2019.

To an extent, the creators of “RoMeincraft” accepted this type of counterplay as a part of the creative experience of crowdsourcing and playing *Minecraft*. According to Politopoulos et al. (2019), “Participants were encouraged to base their play on archaeological and historical information in the form of site plans, detailed building plans to scale, photographs of experimental reconstructions, and artistic impressions, but to also be creative” (p. 167). So, creative counterplay was partially expected. In order to make sure that the building was progressing smoothly, at least one administrator needed to be present as a builder at the site. However, sometimes play proved to be unproductive and interfering with the gaming experience of others. There were moments where “RoMeincraft”’s administrators had to interfere and remove acts of play that could potentially be destructive or offensive. Examples were the removal of TNT blocks placed at the building site or phallic structures. Also, constructions that were not within the theme or accurate enough were either left *in situ* or removed to another location where all the structures were collected.

3.1.4. Conclusions

This case study is an innovative example of a bottom-up approach in which specialists (in this case archaeologists and game lovers) help people of all ages to rebuild the past through gaming. Even though no formal evaluation study was conducted to explore the actual impact of this project, it reveals the perceived advantages of exploring heritage sites through gaming: increased engagement (especially when it comes to children and youth), collaboration between users, and learning through play. The events also gave participants the choice on how they wanted to engage with the game: as spectators, builders or virtual reality explorers. However, the case study also highlights some challenges and raises important questions: Can video games provide an accurate representation of the past? Is it necessary to do so? What is the relationship between authenticity and play? And, what is the role of “counterplay”?

Arguably, one of the main advantages of serious games, is not only to provide accurate information or opportunities for collaborative learning, but to also fascinate, immerse, and initiate new ways of thinking. Exploring a 17th century London in flames allows a realization of the scale of destruction than no text or illustration can convey (see Image 3.1.). Trying to rebuild, brick by brick, a lost heritage site with others, allows thinking about complicated structures and the human effort they require (see Image 3.2.). As Politopoulos & Mol, 2021 put it: “Video games are used not (only) because they can offer us accurate representations of the past: in fact, one could even say that this is the least interesting of their potential uses. Rather, video games are a crucial form of digital heritage because they can offer us *concepts* of the past, ways of thinking in, around, and about the past, as well as experiences of the past through play.” (p. 90).

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3.2. CASE STUDY 2:

Digital technologies and the repatriation of the Killer Whale crest hat

Abstract

Requests for the repatriation of cultural artefacts have been growing steadily over the last years. At the same time, the rapid advancement of new technologies allows the scanning, 3D modelling and printing of accurate copies. This case study explores how digital technologies can contribute to repatriation claims through the creation of accurate copies replacing the returned originals in the museum and emphasises the potential of collaborations between the museums and communities involved. The case describes the collaboration between the Smithsonian National Museum of Natural History (US) with the Tlingit native community of Alaska, which requested the repatriation of a Killer Whale crest hat. The repatriation claim was successful, leading to both the repatriation of the object to the community and to the development of a collaborative project for creating digital 3D scans and replicas. The museum created digital 3D scans of the original object and a replica was created that replaced in the museum the original that was returned. This case is one of the most illustrative examples of how technology can facilitate the resolution of such claims, and promote the collaboration of museums with local communities, benefiting both the museum and the local community. It is also a great example of how the advancement of new technologies can open new opportunities for collaborations for the public benefit. Finally, it highlights how digitally produced replicas can facilitate the repatriation of claimed artefacts and raises important issues regarding the ownership or control of data files and potential future replicas.

3.2.1. Context: Museums and the advancements of 3D technologies

The requests for the repatriation of cultural artefacts to their countries or communities of origin have been growing steadily over the last decades, with involved parties trying to find optimal solutions. Such claims may concern, amongst others, war plunder, artefacts of former colonies, indigenous art or artefacts of illicit origin acquired by museums through the market. When such claims are raised, museums find themselves in an awkward position as to how to

handle them whilst one of their main concerns is that such returns may create a precedent, resulting in emptying their cases from valuable artefacts.

The last years have also seen a rapid advancement of new technologies that allow the scanning, 3D modelling and digital printing of accurate copies in museums. Digital models can now be created by 3D scans of cultural artefacts, using 3D imaging equipment and specialised software. Such models can be acquired through photogrammetry, laser scanning, or other techniques that provide a high level of precision and accuracy (Ballarin et. al, 2018).

Apart from many different uses in the conservation and preservation of cultural heritage, these 3D models can constitute the basis for creating exact replicas of the object, either through 3D printing or CNC (Computer Numerical Control) milling. This in fact may allow museums to reconstitute a potential wrong, cultivate good relations and establish collaborations with institutions in other countries or communities, and at the same time – by replacing the original artefact with a replica – preserve the investment made by the museum to integrate the cultural good into its collection.

On top of that these technological advances in 3D modelling, 3D printing, and milling, have created a range of possibilities for the museum sector, so as to offer multi-sensory experiences that provide visitors with new ways of interactions with the objects on display (Wilson et al. 2017). The ability to create precise replicas can offer many advantages to museums: a direct interaction with the objects through touchable exhibits that can enhance the learning experience through haptic/tactile interactions, the creation of replicas for display purposes when the originals are too fragile, or to provide a touchable replica for the blind, or partially sighted visitors/visitors with print disabilities or visitors with learning difficulties (see Balletti et al., 2017; Neumüller et al., 2014; Scopigno et al., 2017).

3.2.2. Case Study Description

This case concerned a Dakl'aweidi clan Killer Whale crest hat of the Tlingit native community of southeast Alaska. The hat, decorated with red, black, and turquoise paint, was carved from alder wood and represents a killer whale emerging from the ocean (Hollinger et al., 2013). Such hats are very important for the Tlingit tribe and have both a cultural and religious significance.

The hat was purchased for the Smithsonian National Museum of Natural History by ethnologist John Swanton in the early 1900s. The repatriation of the hat was requested by Mark Jacobs Jr., the leader of the Dakl'aweidi clan, and his son Harold Jacobs (Isaac, 2015). The museum researched the information given regarding the origins of the hat and repatriated the object in 2005.

After the repatriation, the two sides initiated a collaborative project for the creation of a replica of the original hat, that would be used to educate the public for the importance of such objects and to incorporate the story of this repatriation into the museum exhibition. An agreement was signed between the parties, giving the authorization to proceed with the creation of the replica. According to the agreement, when the replica is displayed in the museum, it should be clear that it is a replica, so as not to offend the members of the tribe (Hollinger et al., 2013). The leader was involved and consulted throughout the reproduction process, to ensure that the 3D images would not be inappropriately used on the internet without his approval.

Three types of 3D documentation processes were used for scanning the object and creating a 3D model of it: laser scanning, Computer Tomography (CT) scanning, and Photogrammetry.

After the 3D model was created, CNC milling was used for the creation of the replica (see Image 3.4.). Alder wood was provided by the carver of the tribe, so that the replica could be produced from the same wood as the original (Hollinger et al., 2013). The final replica, produced in 2012, is exhibited at the Education Centre of the museum.



Image 3.4.: The original hat next to the digitally created replica. The replica is seen on the left (E433020) and the repatriated original is seen on the right (E230063). Photo courtesy of the Department of Anthropology, Smithsonian Institution (photo by Eric Hollinger 2012).

3.2.3. Issues at stake: a mutually beneficial process

One of the concerns of museums returning artefacts is the fact that since the returned objects are not available on display, the museum narrative needs to be adjusted and gaps may be created both in the narrative and the museum space. This project provides an excellent example of how technology can fill this gap and create new opportunities for enriched narratives in the museum. The created replica contributed towards a dual aim: first, the sacred object returned to its rightful owners and second, it allowed the museum to include the story of return to its exhibition, facilitating, thus, the understanding of the importance of these objects to their communities and the importance of such repatriation acts. Having the clan permission, the NMNH filmed the replication process, and the video was used in the museum to educate the visitors regarding this process.

This collaboration also proved fruitful from a research perspective, since the close collaboration with the tribe members enriched the knowledge of the museum staff regarding the object's use and cultural context, with direct educational benefits to the museum visitors as well. Throughout the digitization and replication process, the museum was in close collaboration with the tribe members, who provided information regarding the construction of these hats and their spiritual aspects. All this new information greatly benefits the museum and its visitors, who will have access to an enriched narrative (and not an impoverished one as feared by many museums that reject repatriation claims stating that the return will disrupt the museum narrative and visitor experience). As a member of the museum staff noted "we have come to find that we gained a deeper understanding of the objects themselves and the cultural context in which they functioned originally" (Isaac, 2015, p. S292).

Such collaborative projects can also provide benefits to the involved communities as well. During the process, the members of the clan noted the story of a fire in 1944 in the Tlingit village of Hoonah, from which only two such hats had survived, and noted that if this technology existed at the time “the lost objects could have been replaced using the digital data as a model for carvers or to guide computer assisted carving machines” (Hollinger et al., 2013, p.207). Thus, such digitization and replication techniques can contribute to the digital archiving of such objects, offering a protection from loss, or other disaster.

After the project completion, the collaboration of the two sides was enhanced with the digitization of an extra seven clan crest objects and other clan leaders expressed their interest to scan their objects to protect them from future losses, or to create replacements for originals that are damaged (Hollinger et al., 2013; Isaac, 2015).

Finally, one of the important issues involved in such projects is the issue of intellectual property rights. This was also one of the tribe’s concerns since, in the past many of their Tlingit arts and crafts were photographed and reproduced for commercial reasons without their consent, and they feared that such technologies could make it easier for people to exploit their culture commercially. Indeed, when 3D modelling and digital printing/milling are used in the museum context, there are some intellectual property implications that should be considered, regarding who owns or controls the data files, or who decides when and why future replicas can be made (Elias, 2019).

In this case, the agreement between the parties stated that the intellectual rights relating to the hat belonged to the tribe and that the replica would be used only for museum purposes and would not be reproduced without the permission of the clan leader. It was also agreed that the digital scans of the object would not be available to the public to download through the 3D online gallery of the museum (Isaac, 2015).

Nevertheless, despite the many benefits of such practices, some museums faced with repatriation claims still refuse to engage in such practices. For example, in a latest development, the British Museum has refused the Parthenon Marbles to be digitally scanned for the creation of an exact replica by the Institute of Digital Archaeology (IDA) based in Oxford, without providing any justification for this refusal¹⁷.

3.2.4. Conclusions

This case is one of the most illustrative examples of how new technologies can facilitate the resolution of repatriation claims. It also provides a unique example of how such repatriation practices with the use of new technologies can constitute the basis of collaborative projects bringing together museums and local communities. As explained, apart from the actual return, the benefits from such collaborations can be many, benefiting both the public, the local community, and the scientific community.

The advancement of new technologies has created new opportunities, bringing new dimensions to the resolution of repatriation claims. Technology can help both local communities to claim back their heritage and museums to fulfill their mission. More

¹⁷ The IDA has also announced that it will pursue this further in court, since as a state-funded institution, the British Museum should offer unhindered access to its premises. See <https://neoskosmos.com/en/2022/03/23/news/greece/british-museum-to-face-court-after-rejecting-request-for-3d-scan-of-parthenon-marbles/> (Last Accessed: 29 March 2022).

importantly, through these technologies, a new dynamic collaboration can be achieved between the parties.

Nevertheless, this case also highlights the new roles that digitally produced replicas can play in the museums returning artefacts and raises important issues regarding the ownership or control of data files and potential future replicas. Despite their benefits, 3D models and print technologies may create implications regarding unauthorized reproduction of copyrighted 3D works, so it is important to consider such issues including the protection of the intellectual rights of the parties involved. As more such projects will appear in the future, a fair balance is necessary between restrictive access to such models in order to protect the rights of the rightful owners and public access to knowledge.

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3.3. CASE STUDY 3:

Matters in Media Art: Looking after time-based media art

Abstract

As art museums see an increasing number of media artworks entering their collections, new challenges arise as fast as technology itself is advancing. Several major museums are dedicating specialized departments and projects to effectively tackle new media artworks resulting in the development of more collaborative approaches especially for overcoming acquisition and preservation challenges. In this case study, we look into one of the earliest

examples of collaborative initiatives amongst museums, that emerged from the need of gathering, expanding, and sharing best practices for handling time-based media artworks, the “Matters in Media Art” initiative. This collaborative venture started in 2005 between the New Art Trust, the Museum of Modern Art, the San Francisco Museum of Modern Art, and Tate. The initiative’s website makes available and invites contributions on acquisition, documentation, loan, and digital preservation practices for time-based media artworks. This case study is one of the most comprehensive efforts to facilitate a consensus-building platform amongst museums regarding the acquisition, documentation and preservation of new media artworks. “Matters in Media Art”’s scope and purposes evolved gradually, comprising a significant repository of information and methodologies open to the broader museum and media conservation community. The significance for collaborative development and adoption of common practices is undeniable as such artworks will never cease to challenge museums. Can a single platform achieve this difficult task and to what extent has “Matters in Media Art” fulfilled its aims? What other actions or support are necessary to strengthen this evolving museum community and its obligation to safeguard the new media art of our times?

3.3.1. Context: New Media Art

Museums have been collecting new media art for a few decades now. The term “new media art”, introduced at the mid-20th century, refers to artworks utilizing film, video, and sound, and has been constantly expanding to include artworks made with various types of electronic and digital technologies, such as artworks that use Virtual Reality (VR), Augmented Reality (AR) and Artificial Intelligence (AI). The challenge with collecting new media art is that technology changes rapidly and eventually, versions of it, become obsolete. How do you preserve for future generations an artwork that uses technologies, hardware, software, and platforms that might not exist or might not work properly in a few years? What kind of agreements do you make with artists? In what formats do you back up the artwork to safeguard it in the future? Is hardware a part of the artwork or can it be replaced? How can museums deal with loans, acquisitions, documentation and the digital preservation of new media artworks? As artists are increasingly working with new and emerging media, these questions become more urgent than ever.

Our case study, “Matters in Media Art”, is one of the first instances of museums forming an alliance in order to collectively answer these questions and create guidelines, understand and untangle this art-tech Babylonia, and eventually safeguard its products for generations to come¹⁸.

¹⁸ It’s worth mentioning that a growing number of research projects, networks, and initiatives have been contributing methodologies for dealing with new media artworks. For example, the Variable Media Network, Tate’s Time-Based Media Lab, DOCAM Research Alliance, CRUMB, and ArtHost. Amongst them, a small number of esteemed museums and institutions from around the world are also dedicating relevant specialized departments, internal and external projects, or working groups. For example, the Tate Modern, ZKM Center for Art and Media, Ars Electronica, Solomon R. Guggenheim, San Francisco Museum of Modern Art, New Museum, MoMA PS1, and Whitney Museum_of American Art.

3.3.2. Case Study Description

“Matters in Media Art” (MMA) is a collaborative project initiated in 2004 by the New Art Trust (NAT), a non-profit foundation established in 1997 between the Museum of Modern Art (MoMA), the San Francisco Museum of Modern Art (SFMOMA), Tate Galleries (UK) and one of the earliest media art collecting teams, Pamela and Richard Kramlich, from California, USA. This partnership aimed to “enhance the international visibility, awareness, and future legacy of media artworks” (Kramlich Collection, n.d.). The Media Matters project (renamed “Matters in Media Art” in 2012), was “designed to provide guidelines for the care of time-based media works of art” (MoMA, n.d.). The term “time-based media”, describes artworks that are usually “video, slide, film, audio or computer-based [and] unfold over time according to the temporal logic of the medium as it is played back” (Tate, n.d). While this term appears in the general descriptions of the MMA project, it is used interchangeably throughout its various descriptions and in other literature references with the terms “new media art” or “media art”; this comes as proof of the flux and open nature of the genre and its terminologies.

The project progressed and adapted its goals in three phases, which will be further analysed below. During the first phase (2004), the consortium addressed matters of Loans of new media artworks. The next year, in 2005, the Media Matters web resource was published on Tate’s website, sharing loan related documents and templates. The second phase (2007) informed the website with relevant insights through an additional “Acquisitions” section. (MoMA, n.d.). The third phase (2010-2016) produced the “Documentation” and “Digital Preservation” sections, which similarly shared resources, documents and downloadable templates focusing on digital video-related subjects. It also introduced an independent and openly accessible website (see Image 3.5.), that was collaboratively redesigned by the consortium partners between 2012 and 2016. The website remains openly accessible to this day, sharing its accumulated methodologies, recommendations and information, and inviting contributors to utilise and continue enriching its content.

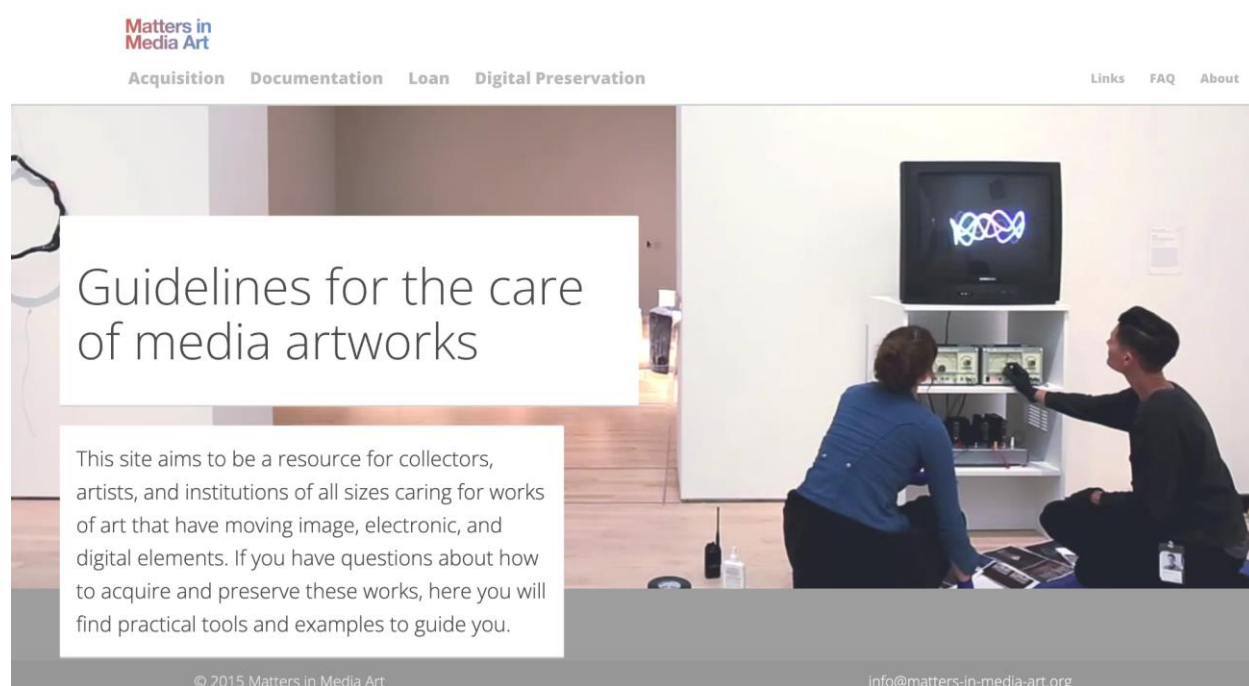


Image 3.5.: Opening page of the Matters in Media Art website; Martina Haidvogel and Sasha Arden adjusting "TV Crown" by Nam June Paik.

3.3.3. Issues at stake: loans, acquisitions, documentation and digital preservation

The distinct attributes, technological instability, obsolescence, and the inherent complexity occurring from the interlinked physical, digital, and conceptual components of new media artworks, challenge the previously linear process of storing and exhibiting artworks in museum collections (Rinehart & Ippolito, 2014, p.10). "Matters in Media Art" was initiated by institutions who had a direct and immediate interest in including and handling new media art in their institutions, recognizing the need to explore best practices for conserving, displaying, and storing new media artworks (Kramlich, n.d.).

As aforementioned the "Matters in Media Art" project evolved in three phases, having produced resources in four distinct areas: Loans, Acquisitions, Documentation and Digital Preservation.

Loans: The initial purpose of the project sought to establish a functional mechanism of inter-institutional loans, within the New Art Trust (NAT) coalition (MoMA, n.d.). As Smith explains, during the first phase (2004), curators, conservators, registrars, and media technical managers from NAT were brought together in a 2-day workshop to agree upon standards and methods on new media artwork loans (2020, p.40). The workshop produced a series of deliverables that included procedural diagrams, conceded terminology, as well as agreements on amending and revising facility and condition reports, revisions to standard loan requirements and processes. The results, relevant documents, and downloadable templates were shared on the Media Matters website in 2005 (ibid).

Acquisitions: The consortium organized a second workshop in 2007, marking the second phase of the project. Focused on Acquisitions, the workshop ran four sections of investigation: Acquisitions Summary, Purchase Agreements and Deeds of Gift, Acquisition Follow-Up, and Acquisitions FAQ. Five acquisition stewardship documents were eventually produced and shared through the Media Matters web resource on a dedicated section (Smith, 2020, p.42).

Documentation: Issues of Documentation were tackled in the third phase of the project (2010-2016). The consortium had a third workshop bringing to the epicentre digital artworks, their fundamental elements and relevant museum stewardship; Additionally, each museum undertook an independent project in this phase (see Image 3.6.), focusing on specific issues that each institution felt necessary to address (Smith, 2020). The team continued working remotely but in direct communication with each other in the following years (ibid), before presenting their results to the latest significant iteration of the "Matters in Media Art" website in 2016, which was presented during the 2016 American Institute for Conservation's 44th Annual Meeting (Haidvogel & Oleksik, 2016). The Documentation section shares specifics on handling and caring of digital video artworks along with relevant templates addressing subjects like cataloguing, condition reporting and assessment of digital video works. (Smith, 2020, p.48).

Digital Preservation: The Digital Preservation section was produced and presented in parallel with the Documentation section. This section presents core principles and various approaches for collection requirements focused on digital video works; a collection survey acts as a tool to assist in outlining the needs of collections. (Smith, 2020, p.49).

An overall, significant issue addressed through this project was that of collaborative consensus-building practices amongst museums. The fact that three major museums and

a private foundation commonly initiated such a project was a significant achievement. Most importantly though, this intention of collaboration and communication was expanded beyond the project's core team. In 2012, "Matters in Media Art" announced the project's renewed aims, to expand its content and extend its model by strengthening its connections "to other networks of allied research and practice" (Matters in Media Art, 2012). While this extended collaborative model may have been realized unofficially throughout the project, the most important iteration was when the project launched as an independent website, hosted and openly accessible through GitHub in 2016. Beyond redesigning the user experience of the website, everything was made available via GitHub with a Creative Commons Attribution 4.0 International license, making the webpage's content and source code free to copy, share, adapt, reuse, and redistribute (GitHub, n.d.). The resources and development of the website have ever since been open to any interested party to utilize, contribute, propose, and add relevant content, moderated by the MMA core team and the broader community. The latest iteration seems to have taken place during the Covid-19 epidemic. The website was translated in Mandarin Chinese in 2021 and published as a stand-alone website (INCCA, 2021).



Image 3.6.: Expert meeting of media conservators and archivists on digital repositories and user needs hosted by the Museum of Modern Art, New York, for the MoMA Digital Repository for Museum Collections (DRMC) project. From left to right: Mark Hellar, Gwynne Ryan, Ben Fino-Radin, Kara Van Malssen, Martina Haidvogel, Agathe Jarczyk, Joanna Phillips, Anna Henry, Kate Lewis, and Peter Oleksik. Digital image © 2014 The Museum of Modern Art, New York.

3.3.4. Conclusions

This initiative is often mentioned in relevant academic papers and online platforms/resources, amongst the most important efforts to achieve consensus and agreed-upon preservation methodologies for media artworks. The general scope of the project was achieved to a great degree, having managed to gather a significant amount of essential stewardship information, and formulate various standardization recommendations for time-based media art. It's undeniable that "Matters in Media Art" has formulated a significant resource and initiated a

unique, flexible, collaborative platform inviting a vast array of stakeholders to contribute to the conversation around media art. However, very little academic research or other outputs present an in-depth analysis of the resource or details informing of its broader impact. Similarly, there is no clear indication to what extent this resource is used by other institutions or organizations, or how involved and interested other museums are in actively participating in such consensus-building resources.

What remains is to find ways to incentivize and involve more museums, as well as other stakeholders, in this collaborative effort more effectively. This could be continued through the “Matters in Media Art” platform; otherwise, the lessons learned from this great collaboration could be carried out in a new framework. More and more museums should and could come together as active stakeholders in formulating the policies and standards necessary to respond to the ever-growing category of new media art. Rendering museums capable of facing such artworks and reaching consensus is not only proven possible but most significantly necessary to ensure the safeguarding of an entire art genre.

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4. Measures on how to establish successful CH management

The COVID-19 pandemic, which is a transformative and tough period for mankind, has paved the way for innovation and new ways of managing CH. The CH sector in Europe does not need to waste this opportunity by going back to the traditional ways of operating. Instead, it needs to **build on the best practices of pre-pandemic situation and the lessons learned over the last years to develop a more sustainable CH Management**, while taking advantage of technological developments and digital innovation. **That, at its core, is disruptive.** CH professionals need to go beyond existing practices of digitizing collections and find new ways to make visiting a museum or heritage site an interactive and immersive experience that engages the audience in the context of the fourth Industrial Revolution.

ReInHerit's primary and secondary research highlights the importance of **effective collaboration between different CH professionals and stakeholders in the context of digital innovation placing it within policy frameworks.**¹⁹ Until now, collaborations, networks, and communication in the field of CH have been seen as additional tasks not linked to the mission and vision of museums and heritage sites. Nevertheless, in the coming years, any museum and heritage site should consider collaborations, networks, partnerships and communication as integral parts of its mission and vision. The idea of establishing partnerships and synergies should underpin all CH Management activities, especially those related to Audience Development and Collection Management. Digital collaborations of museums and heritage sites originating from the same or different parts of the world, focusing on a sustained institutional commitment to experimentation and innovation as a core aspect of sustainable CH Management, have the potential to empower CH sector to address its challenges and fulfill its important role in cultural sustainability. The innovative Digital Hub (WP6), which is currently designed by the ReInHerit project, can bridge the gap in the communication and collaboration between the various stakeholders of the cultural heritage sector (museums, heritage sites, policy makers, professionals, communities, etc.), creating an open and collaborative space where relevant knowledge will be developed, transferred, shared, and experimented upon. In addition, stronger partnerships between museums/heritage sites and local communities should be developed. This reconnection of heritage with local communities can help museums and heritage sites to redefine themselves in an ever-changing world.

In terms of **audience development**, it is important that CH professionals **do not exceed the needs of some types of audiences**, such as tourists, **and ignore the needs of others**, such as locals, young people, disabled people, minorities, immigrants, digital natives, netizens, unemployed, people who are economically or geographically disadvantaged, etc. On the one hand, they should begin by successfully targeting the types of audiences that have been overlooked in order to understand them, reach them and provide them with an enjoyable and meaningful experience by engaging them in the cultural process. On the other hand, they should refresh the cultural offer for existing audiences, by developing new experiences and deepening their relationships with them. It is important for museums and heritage sites to connect with local and global as well as physical and digital audiences. For example, as the tourism sector rapidly recovers from the recent pandemic it is important for CH professionals to find the balance between international mass tourism and a more sustainable and local tourism based on cultural heritage.

Innovations and technologies can be the main vehicle for the ReInHerit project to make CH accessible to a broader audience. The immersive performances (WP4: Digital Hub), the

¹⁹ For interesting examples see the case studies in Chapter 3 of this booklet.

exhibitions (WP6: Pilot Phase tested through Digital & Travelling Exhibition), the educational apps and story-based games, the interactive maps and digital material such as the Good Practices Guide and the Toolkit (WP3: ReInHerit Toolkit), that will be produced by the ReInHerit project are perceived as highly disruptive ways to attract people to museums and cultural heritage sites, who would otherwise never have approached them.

The rich material provided by the primary and secondary research can contribute to a better understanding of the current available tools, technologies and methods of communication and collaboration facilitating ReInHerit's experts to successfully implement the next phases of the project. The most recent trends identified in the literature are:²⁰

- Personalization/Wearable Devices that create a more powerful connection between the visitor and the story.
- Augmented Reality/Virtual Reality/Mixed reality that brings exhibits and artifacts to life in new and immersive ways and creates multisensory and multimodal experience.
- Gesture Technology/Non-touch Interactives. Especially, in the post COVID-19 era touchless technologies and proximity sensors will likely gain popularity.
- Internet of Things (IoT) technology.
- Mobile Technologies (web and hybrid Wi-Fi apps, mobile apps, tour-based apps, that enrich the exhibit content, mobile ticketing technology, etc.).
- Haptic technologies.
- Indoor GPS tracking systems (track movement within the facility, which allows them to confirm how well a storyline works)
- Artificial Intelligence
- LED/Laser Projection Technologies (creating powerful, immersive museum environments)
- Virtual Touring
- Holographic representations
- Flexible Technology Exhibit Platforms (developing software and designing exhibits that can not only accommodate content flexibility but also allow exhibits to easily change)
- Augmented Reality Selfie-Moments

Recent literature places considerable attention to the **importance of interacting with visitors in dynamic and powerful ways by offering transformative learning experiences, during the entire visitor's journey**. According to the "Visitor Journey theory" the experience of the visit begins before visitors cross the museum/heritage site entrance and goes on after they exit. Playful and immersive experiences are used to inspire creativity not in rigid didactic way but based on informal and participatory learning. The new audiences are young people and local communities, using different digital tools and media to engage and motivate them to experience, enjoy and participate. It is important for CH professionals to reflect the diversity of stories within museum collections and to use digital tools and participatory storytelling to promote social inclusion. Always considering that technology is not a goal itself, but it is a way to make the visitor understand and learn more. Innovations and technologies will help the

²⁰ This material extremely important and useful for the activities of WP3: ReInHerit Toolkit (See D3.2, pp. 13-14).

consortium to achieve the shift from the monologue to a dialogue, establishing a pattern of co-creation of content with users that stimulates their participation and creativity, developing wider connections with new audiences.

Finally, in terms of **new business models and financing**, as demonstrated by the secondary research, the majority of museums and heritage sites in Europe are still heavily dependent on funding from governments or donors and they are less entrepreneurial. In this sense it may prove useful for cultural heritage sector in Europe to benefit from **digital business models**²¹ to become more resilient to current and future challenges. New ideas, concepts, and innovative tools related to digital business models can facilitate CH professionals to create new value and deliver it to visitors and other stakeholders, as well as to turn this value into economic, social, and cultural outcomes. For example, the CH sector in Europe can create compelling forms of engagement in light of the growing digital economy and changing modes of cultural consumption. In this sense, in parallel to their core services (e.g., exhibitions) museums and heritage sites should include added digital services, such as e-shops. Through e-shops, they can sell museum-related products that represent creative ways for audiences to engage with their collections beyond their walls. They can also promote digital content, stories and experiences, drawing attention to digital storytelling techniques that moves to more dynamic forms of digital creation for which visitors are willing to pay (narrative-driven content, bespoke curator tours, live events like virtual escape rooms, virtual exhibitions, etc.). At the same time, they need to find methods to commercialize such content. This material is extremely valuable for the WP4: Digital Hub given the fact that an embedded e-shop supports the creation of a new digital economy for the CH sector. In this way, museums and heritage sites may successfully cope with future crises.

The **disruptive sustainability model** proposed by the ReInHerit project should support museums, especially smaller ones with fewer resources, to successfully address current and future challenges. It is based on a people-centered approach to researching what CH actually is, how it can be used, protected and interpreted, by whom and for whom. It increases public awareness on European cultural heritage through co-creative and participatory digital practices. This perspective of CH Management expands its horizons to offer the necessary tools for the development of CH by building a sustainable ground for the well-being of humanity.

²¹ See D2.2 - Chapter 7: New 'Business' Models and Financing.

Appendix

European Heritage Label site:



Historic Centre of Turaida (Latvia)

SIGULDA, VIDZEME (LATVIA), 13TH -20TH CENTURY

As a crossroad of historical events, the **Historic Centre of Turaida** played a role in the integration of the Baltic States into Europe also by using western Christianity as a means for social integration.

This CH consists of the Turaida medieval castle, the Folk Song Park at Danu Hill, the Cultural and Historical Heritage of Gauja Livs (one of the ancient tribes of Latvia), the Church Hill and Wooden Church (1750), one of the oldest of its kind in the country.

The Historic Centre of Turaida played an important role in the spread of Christianity and was one place where the “Singing Revolution” contributed to the reintegration of Latvia to Europe representing European values of freedom and cultural diversity.

To protect, research, maintain, interpret and bring into modern cultural circulation rich heritage of the Historic Centre of Turaida the **Turaida Museum Reserve** has been established.

On 13 June 2022, at the official ceremony in Brussels, the Turaida Museum Reserve received the **European Heritage Label**, which is awarded by the European Union for a significant contribution to European Heritage.

Turaida Museum Reserve has digital interpretation facilities for enhancing the visitor experience. A Mobile application-guide is created and available in 6 languages - Latvian, English, Russian, German, Lithuanian, Estonian - in both text and audio versions.²²

The Historic Centre of Turaida is heritage site covering 57,86 hectares, which includes natural and cultural space, tangible, intangible heritage. The Historical-Centre, one of oldest state formations in Latvia, has been preserved, maintained and embodied in today's creative cultural process. The Turaida Museum Reserve was established in 1988 to preserve and interpret natural, cultural, historical values of the Historical-Centre and awarded the status of specially protected cultural monument in 1994. This is the only such object in Latvia. The message of the Turaida heritage and its importance in Latvian and European context is demonstrated in five thematic complexes - Folk Song Park, Heritage of the Gauja Livs, Turaida Medieval Castle, Turaida Church & Church Hill, Economic Centre of Turaida Estate. Forty-eight

²² The mobile application can be downloaded for free on: **Google Play** (<https://play.google.com/store/apps/details?id=com.turaidaapp>) and **App Store** (<https://apps.apple.com/lv/app/turaida-museum/id1602382003>).

outdoor and indoor exhibitions tell about the natural environment and manifestations of human activity, from 11th century to present day. In the interpretation, heritage becomes a source of knowledge and experience in the search for solutions to the current problems of modern society.

Turaida was historically located in area characterized by liminality and interaction between different cultures: both a peaceful dialogue between different cultures and religions, and frequent wars and conflicts, the domination of different countries. From the ancient Prehistory, the Turaida District was part of the border zone between Indo-Europeans (The Balts) and Finno-ugrians; later - the boundary between Christianity and Paganism, between Western and Eastern (Orthodox) Christianity, and more later between the Protestant and Catholic countries. The pages of political history show the Crusades and internal European colonialism and the various aspects of their impact: the transfer of knowledge and ideology, the multifaceted process of Europeanisation along with the spread of religion and trade, the integration of civilization and dialogue between conflicting parties. As a crossroads of historical events, Turaida occupies an outstanding place in the history of Latvia and the Baltics during the formation of medieval Livonia at the beginning of 13th century, which is the time of Europeanization of the Baltic States, when Western Christianity was the basis for social integration. The Turaida Stone Castle is an outstanding visual symbol of today, which displays practices adopted from Western Europe for construction of stone buildings and making of large medieval bricks (Klosterformat).

In the context of the Finno-Ugrian peoples of Europe, the research theme about the Gauja Livs is essential. It highlights the importance of the cultural diversity of the small nations.

The research, exhibitions of the Economic Center of Estate on historical themes have cross-boarder significance. The themes are related to the understanding of freedom of the nation and individual in the 19th-20th centuries. Recently, several European countries celebrated their centenaries, including Latvia, which founded in 1918, became a democratic republic. It is important to explain to young people the difficult task of nation-building and the consolidation of modern democratic values in human consciousness. Therefore, the exhibition of the Museum Reserve "On the Way to the State of Latvia" is significant, in which these important themes are interpreted, drawing parallels with the developments in Latvia and Europe in the 19th century.

The end of the Soviet occupation was achieved by various methods of non-violent resistance. That time is called the Singing-Revolution. Folk Song Hill in Turaida has become one of the symbols of the Singing-Revolution, because countless events took place which gave confidence in the people's unity in achieving its goals. These events, especially concerts, where all listeners took part in the singing, made people more aware of their strength and rights. Not all nations choose the path of non-violent resistance and democratic transformation to regain their freedom, therefore it is so important to share the experience gained.

The project envisages more diversified promotion of values, knowledge accumulated by Museum-Reserve highlighting European values and integration in the common European memory. This will ensure that the experience accumulated in the Historical-Centre is available to the widest possible audience, with number of activities related to digital and Internet solutions. It is planned to create thematic guided tours in the Internet environment, to develop further mobile application-guide, ensuring the availability of the message in several languages and in historical places. Online access to investigations will be ensured, enabling everyone to improve their knowledge of CH. New interactive educational programmes and other diverse activities will be created to attract young people, telling about European cultural

values, demonstrating how the natural and cultural heritage helps to solve today's problems and serves as an inspiration, especially among young people.

The project will continue its ongoing activities in the field of lifelong learning and the organization of meaningful leisure time.

The Turaida Museum Reserve, which preserves the Historical Centre of Turaida, is an institution of direct administration under the authority of the Minister for Culture of the Republic of Latvia. The budget of the Museum-Reserve consists of about 60% of the own revenues, and about 40% is a government grant. In 2019, 286 045 people visited the Museum-Reserve before COVID-19. Tourists came from 78 countries around the world. Also in 2020, during the restrictions of COVID-19, more than 100 000 people visited the open-air exhibitions and architectural monuments of the Museum-Reserve but in 2021 due to restrictions of COVID-19 amount of visitors decreased.

Now is time for regeneration. As data shows during first part of 2022 visitors amount increases for 144 % compare to 2021.

The Museum-Reserve activities are based on the rules approved by the Government. Each year the Museum-Reserve arranges new exhibitions, international conferences, scientific publications, provides maintenance, restoration and reconstruction of historical buildings. Cultural landscape is regularly maintained, natural environment studied, and protection rules developed to preserve the ecological balance in the area of the Historical-Centre.

In the context of the European Heritage Label, the European significance/dimension of the Historical Centre of Turaida is particularly highlighted through the prism of Folk Song Hill. Folk Song Hill is a sculpture garden dedicated to the Latvian folk song in Turaida, opened on 7 July 1985. Soon after its unveiling, Folk Song Hill became a particularly important place during the Third Awakening of Latvia. It became the place for our nation, where to regain its traditions and wisdom of life and in which the desire for freedom to develop into the Singing Revolution.

In 1988, when for the first time the International Folklore Festival Baltica took place in Latvia, the red-white-red flag was publicly raised at the sculpture "Father of Song" on Folk Song Hill. It was still the time when Latvia's red-white-red flag was prohibited, but the official flag was the one determined by the occupying power of the Soviet Union. As events progressed, Folk Song Park brought together in a growing number and closer circle folklore groups and ethnographic ensembles, that in countless concerts in Turaida sang out the ideas of unity, cohesion and independence.

In the 7 July of 2022 the International Folklore Festival Baltica – 2022 will held opening event and concert in Turaida which is going to attract nearly 1000 participants from all over Latvia and neighbor countries Estonia and Lithuania.

The project of the European Heritage Label foresees a set of actions that must be implemented in the coming years and what the Turaida Museum Reserve will definitely do. These are new goals and challenges which need to be achieved and which will contribute the recognition of the historical center of Turaida as a European heritage site.

<https://www.turaida-muzejs.lv>

Keywords:

European Heritage Label, Cultural Heritage, Cultural Tourism, Heritage Tourism, Sustainable Tourism, Intangible Heritage, Heritage interpretation, Digitalisation, Communication, Conservation, History, Singing1