

# HANDBOOK

## ON COMMUNICATION AND COLLABORATION IN MUSEUMS AND HERITAGE SITES



In collaboration with



The ReInHerit Handbook On Communication and Collaboration in Museums and Heritage Sites is one of a series of materials produced by the ReInHerit project with funding from the European Union. The present one corresponds to deliverable 5.2.

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## EXECUTIVE SUMMARY

The D5.2: 'Handbook On Communication and Collaboration in Museums and Heritage Sites' is one of a series of materials produced by the ReInHerit project, funded by the European Union's Horizon 2020 research and innovation program under grant agreement No 101004545. D5.2 is a publication based on the outcomes of the previous Deliverables conducted in the ReInHerit project, such as the D5.1 European Museum Study Visits report, the consultation of internal and external experts in the area, and bibliographical resources, including but not limited to the European Commission, ICOM, UNESCO, Europa Nostra, Europeana Foundation, and the United Nations. The European Commission's support for the production of this publication does not constitute an endorsement of its contents, which reflect the views only of its authors. The Commission cannot be held responsible for any use which may be made of the information contained.

The ReInHerit project, aims to contribute to the sector's growth and sustainability in the future by providing practical guidance for the improvement of communication and collaboration between museums, heritage sites, and the cultural tourism sector, to optimize the cultural experience of visitors and the flow of knowledge between professionals.

This comprehensive handbook, designed as a resource for professionals, addresses the critical issues surrounding communication and collaboration within the cultural heritage sector. Outlining key definitions, challenges, and opportunities, the handbook recommends fostering sustainable partnerships, digitalization, and continuous professional development in this dynamic sector.

In accordance with the objectives of the ReInHerit project, D5.2 aspires to:

1. Underscore the vital role of collaboration and communication between museums, cultural heritage sites, and cultural tourism in promoting the preservation and appreciation of cultural heritage.
2. Enhance professional interaction between museum and cultural heritage sites professionals through the exploration of stakeholders mapping, and provide recommendations for creating partnerships, optimal cultural heritage management, and the use of digital platforms.

3. Map and evaluate the public's role in cultural heritage settings, offering recommendations for inclusive, accessible, and environmentally conscious communication, with an emphasis on the use of digital social media and ICT tools.
4. Highlight the importance of sustainable partnerships with the tourism industry, leveraging digital social media and marketing to promote cultural tourism, and also exploring the opportunities provided by smart tourism initiatives.

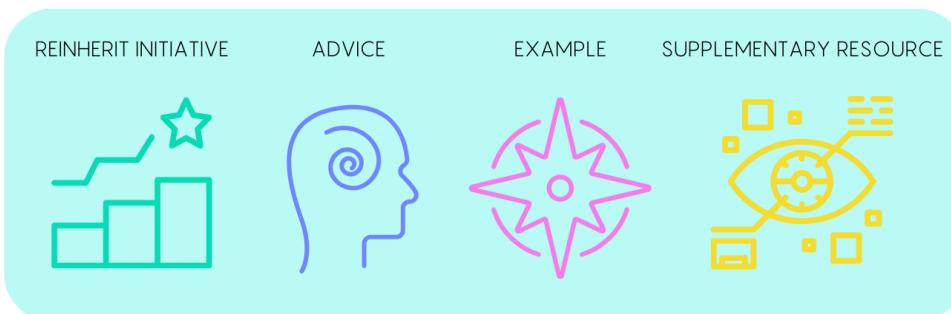
In summary, D5.2 offers an insightful and practical guide to address the key issues in the cultural heritage sector. Through the adoption of the guidelines provided in this handbook, professionals and stakeholders have the opportunity to fortify the sector's resilience, safeguard cultural heritage, and elevate the visitors' experience, securing thus a sustainable future for the cultural heritage sector for the benefit of future generations.

## KEYWORDS

Museums - Heritage Sites - Sustainable Cultural Tourism - Sustainability - Communication - Collaboration - Digital strategies - Museum management - Sustainable Cultural Tourism - Smart Tourism

## LEGEND OF ICONS

Included in the boxes throughout the entire handbook.



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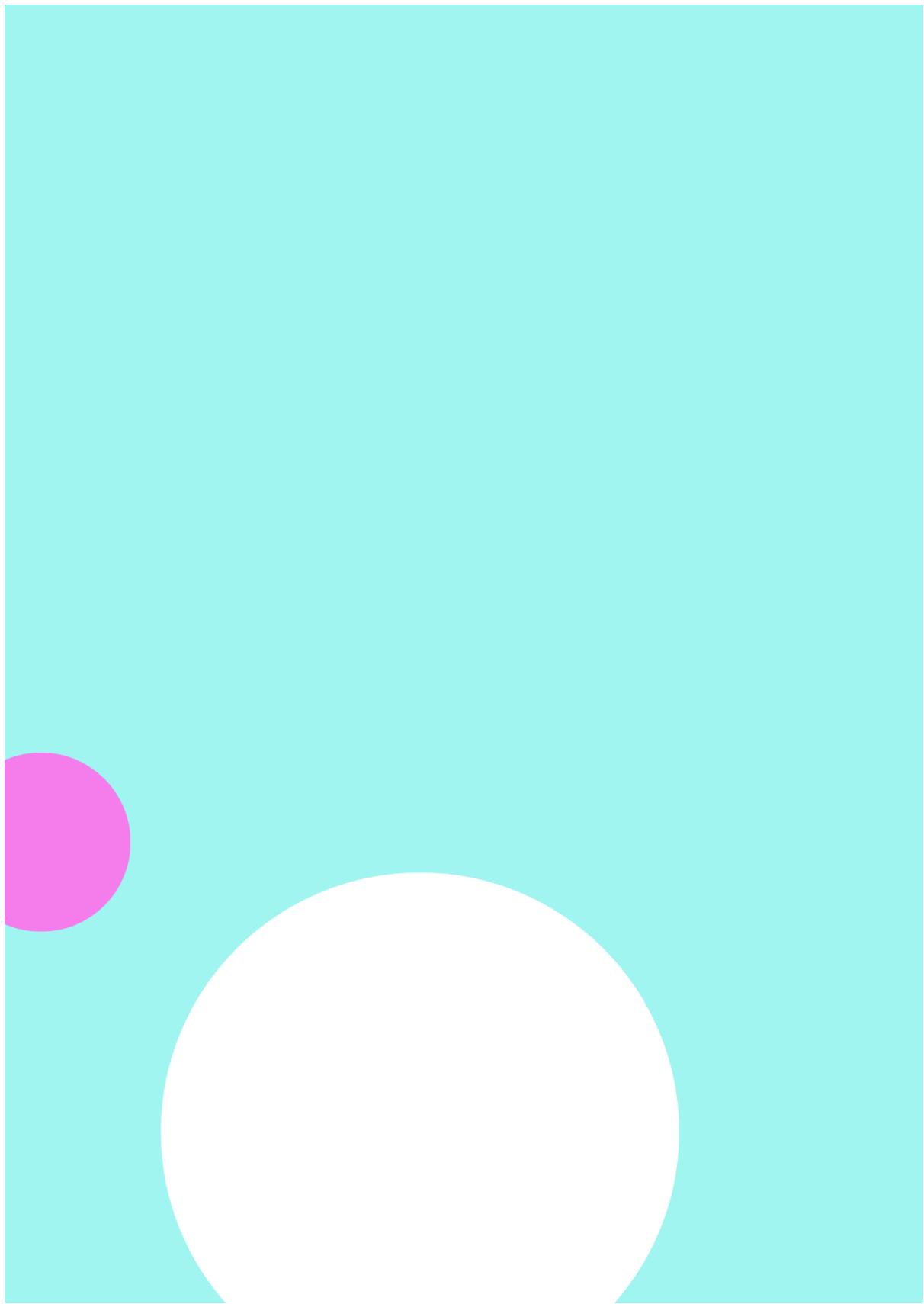
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1

## INTRODUCTION

## 1 Introduction

### 1.1 The ReInHerit Project

ReInHerit is a project funded under grant agreement No. 101004545, by the European Union's Horizon 2020 CSA Research and Innovation programme, on the theme Culture beyond borders – Facilitating innovation and research cooperation between European museums and heritage. The project aspires to disrupt the current status quo of communication, collaboration and innovation exchange between museums and cultural heritage sites, connecting professionals across these fields, and supporting them in presenting Europe's tangible and intangible heritage to citizens and tourists, in their wider historical and geographical contexts.

The ReInHerit project brings together an interdisciplinary group of organizations and their professionals and lays the foundations for the continuation of their collaboration and future participation either within EU-funded research programs, such as "Horizon Europe" and "Creative Europe", thus actively contributing to the better alignment of national activities and policies.

The Partner Organizations are involved in the fields of digital humanities and social sciences, smart tourism, heritage preservation and conservation, all assets that will give them a new dynamic and thus make them more competitive through the development of innovation that meet the needs of Europeans and global cultural sector.

The members of the consortium, belong to different academic and cultural organizations; Through the project, they promote cooperation and transversal strengthening in areas such as digitalization, improved management and application of sustainability initiatives in the area of museums, cultural heritage and sustainable cultural tourism. All of the above, with a view to strengthening the professional capacities of the different sectors committed to the conservation and safeguarding of cultural heritage.

## REINHERIT'S CONSORTIUM



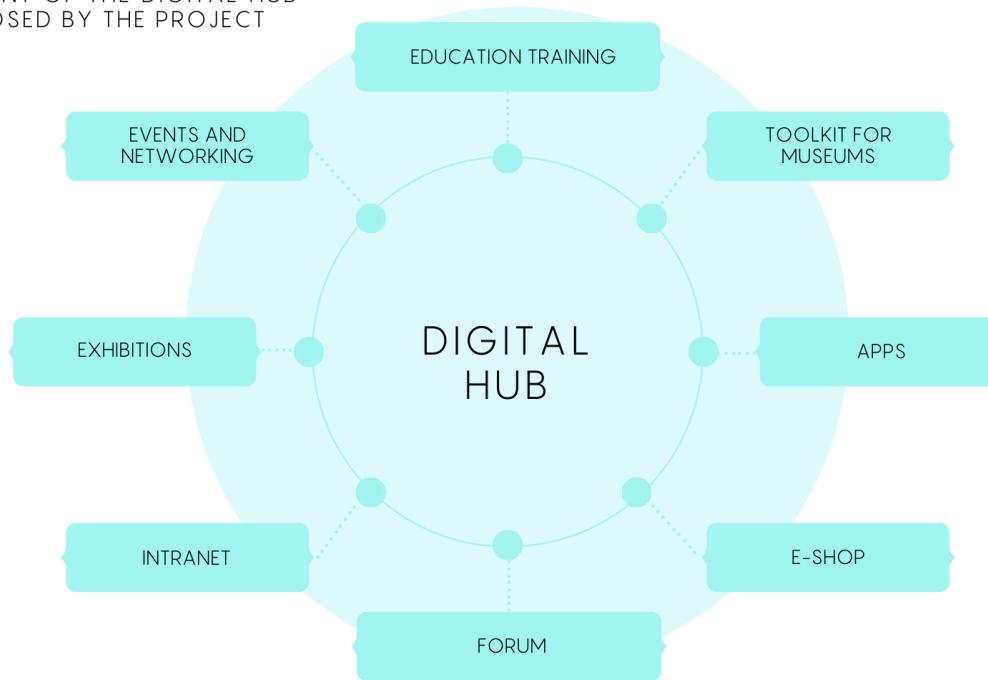
The ReInHerit project involves the participation of twelve partners from seven countries:

- **1** Cyprus: Bank of Cyprus Cultural Foundation, University of Nicosia, and Centre for Research on Intelligent Interactive Media Systems and Emerging Technologies (CYENS)
- **2** Greece: Museum of Cycladic Art and the Blue Shield Association.
- **3** Finland: Arcada University
- **4** Spain: Asociación Arte Sostenible
- **5** Italy: University of Florence-MICC and the Consorzio Materahub.
- **6** Austria: Museum of Graz and University of Graz
- **7** Belgium: European Cultural Tourism Network

The overall objective of the project is to create a digital cultural heritage ecosystem, where all key stakeholders have an open collaborative space, facilitating: business initiatives, knowledge produced through co-creation, digital content curation, visitor experimentation through the exchange of resources and experiences.

This has been achieved through the creation of a Digital Hub<sup>1</sup> that houses various digital tools and resources, such as this Handbook on collaboration and communication between museums, cultural heritage sites and cultural tourism.

#### CONTENT OF THE DIGITAL HUB PROPOSED BY THE PROJECT



<sup>1</sup> More information and all the free resources available at: <https://reinherit-hub.eu/>

The outputs of the ReInHerit's project are grounded in an extensive research framework spanning from 2021 to 2023. This framework encompasses comprehensive desk research, including a thorough literature review. Furthermore, primary research plays a pivotal role, characterized by a qualitative approach, primarily involving focus groups. These five focus groups involved 34 participants, including cultural heritage professionals, public authorities, and researchers. Their aim was to meticulously map and scrutinize the requirements, obstacles, and best practices within the cultural heritage sector.

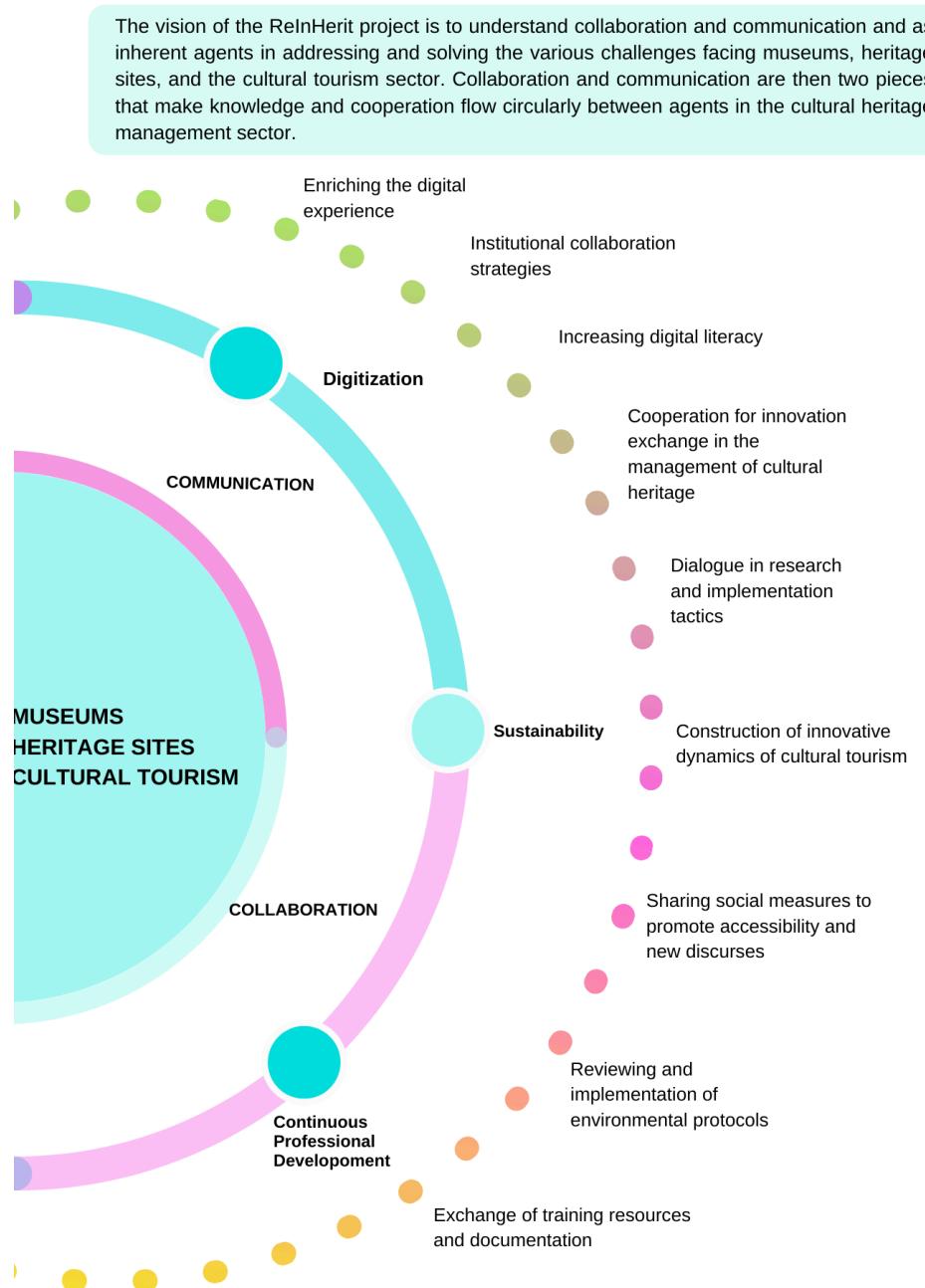
Additionally, the project incorporated National Surveys conducted across Europe, involving over 500 cultural heritage professionals and more than 2,500 visitors. These surveys generated valuable insights and aggregated data regarding the current utilization of ICT tools and platforms within museums and heritage sites. To further enrich the project's findings, several museum study visits were also conducted. This multifaceted research approach underpins the robust foundation of the ReInHerit's project outcomes.



## 1.2 The aim and vision of the Handbook

The ReInHerit's Handbook thematic priorities are founded on effective communication and collaboration within the diverse European cultural heritage sector, built upon three central pillars, on which the objectives of the Handbook are anchored: digitization, sustainability, and continuing professional development.

### THE REINHERIT HANBOOK VISION



Additionally, the ReInHerit Handbook's overarching vision and thematic exploration align the Sustainable Development Goals and the Horizon 2020 Programme, both of which seek to elevate the competitive positioning and operational effectiveness of cultural heritage institutions. While the following SDGs provide a starting point, it's important to customize the Handbook based on the specific context and priorities of the museums and regions it aims to serve:

- SDG 4: Quality Education

Highlight collaborative educational programs and initiatives that promote lifelong learning and cultural awareness.

- SDG 8: Decent Work and Economic Growth

Explore the economic impact of museum collaborations on local communities, job creation, and sustainable tourism development.

- SDG 9: Industry, innovation and infrastructure

Encourage continuous improvement in the forms of infrastructure in the cultural and tourism industry to ensure proper cooperation.

- SDG 11: Sustainable Cities and Communities

Emphasize the role of museums in fostering cultural heritage preservation, community engagement, and urban revitalization.

- SDG 12: Responsible Consumption and Production

Advocate for sustainable practices within museums, such as resource conservation, waste reduction, and environmentally friendly exhibition design.

- SDG 16: Peace, Justice, and Strong Institutions

Highlight the role of museums in promoting dialogue, understanding, and reconciliation among diverse communities.

- SDG 17: Partnerships for the Goals

Encourage collaborations and partnerships between museums, tourism organizations, local communities, and other stakeholders to achieve common sustainability objectives.

### 1.3 What can we find in the Hanbook?

The ReInHerit Handbook on Museums and Cultural Heritage Sites Collaboration and Communication is organized to provide attention to communication dynamics between professionals in the cultural heritage sector, and towards visitors.

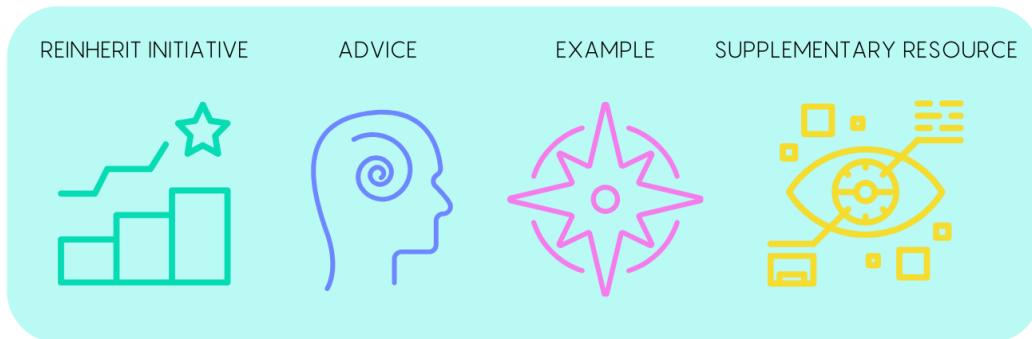
#### OUTLINE OF THE HANBOOK CONTENTS BY CHAPTERS



The manual includes measures to manage and implement actions that improve communication, knowledge exchange and relationships between professionals and visitors. These measures are based on research and data collection from the ReInHerit project, expert consultations and literature research. The material is organized to focus on the dynamics of communication within the cultural heritage sector.

At the beginning of each chapter, audience and stakeholder maps are presented based on the interest of each chapter. These maps, inspired by strategic communication practice, provide an overview of the actors who can contribute to communication dynamics in the museum, cultural heritage and cultural tourism sectors.

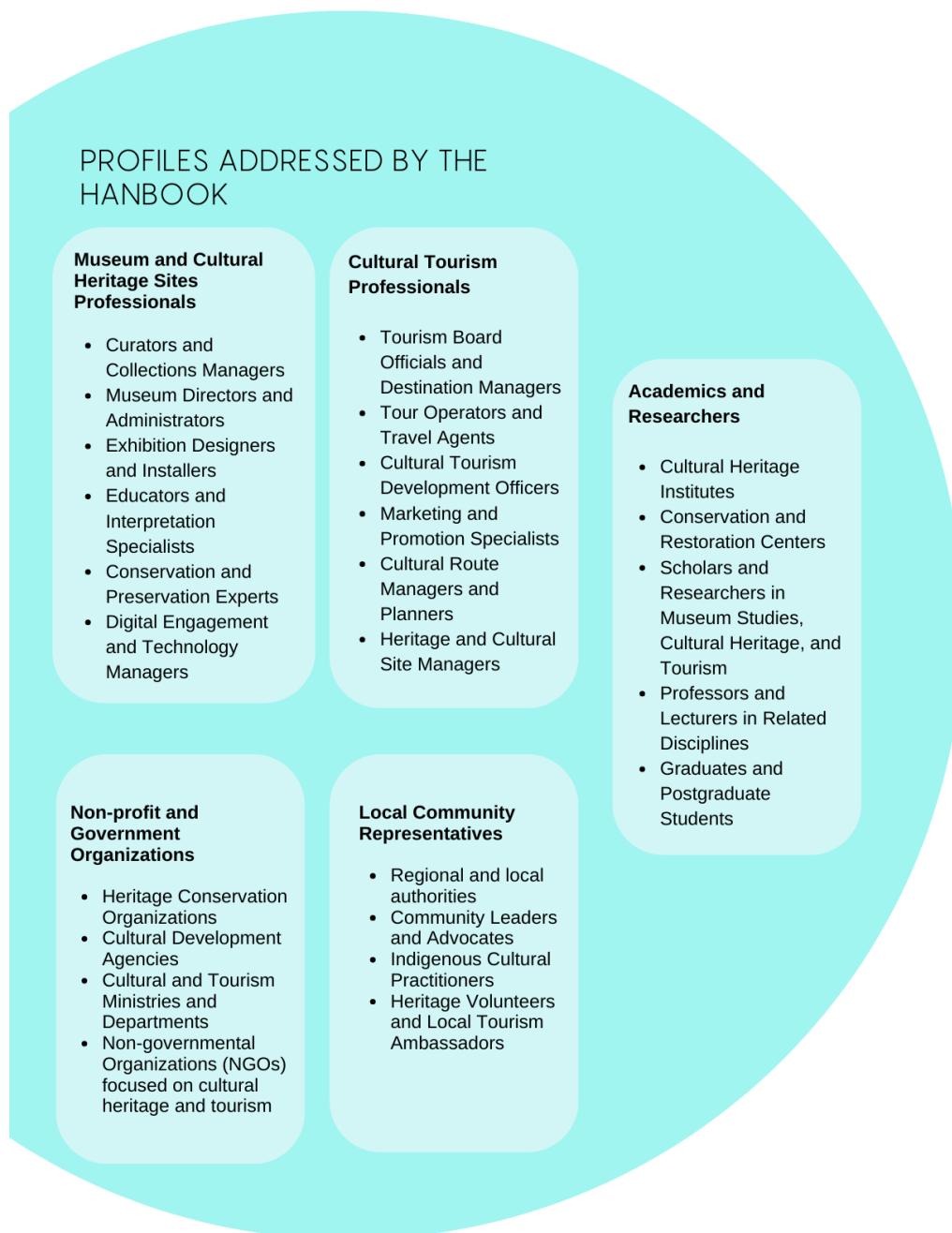
The manual presents examples and resources for readers to consult and analyse, including some of the ReInHerit initiatives, each differentiated by icon:



To encourage self-reflection, each section ends with a “Make It Yours!” box, containing ideas and questions to improve daily practice. Finally, to reinforce knowledge, a dynamic synthesis is provided in the conclusions, as well as a list of references and sources at the end of the manual.

## 1.4 Who is the Handbook for?

The *ReInHerit Handbook* has been meticulously crafted to meet the interests of stakeholders across the cultural heritage and cultural tourism sectors. Our focus is on offering a comprehensive resource that caters to professionals associated with diverse cultural heritage institutions and organizations, along with individuals engaged in the dynamic field of cultural tourism. Some of the key professionals who could benefit from the Handbook include:





## 2

COMMUNICATION AND COLLABORATION  
FOR MUSEUMS, HERITAGE SITES AND  
CULTURAL TOURISM:  
IMPORTANCE AND DEFINITIONS

## 2 Communication and collaboration for museums, heritage sites and cultural tourism: importance and definitions

By Jaime Lopez and Lizeth Salazar

### 2.1 Museums, Cultural Heritage Sites, and Cultural Tourism definitions and relations

To draw a common framework about the relationship between museums, cultural heritage sites and cultural tourism, by exploring their distinctive features together with their interconnection, it is essential to first clarify their definitions.

The current museum definition, approved in August 2022 by the International Council of Museums (ICOM), reads as follows:

A museum is a not-for-profit, permanent institution in the service of society that researches, collects, conserves, interprets, and exhibits tangible and intangible heritage. Open to the public, accessible, and inclusive, museums foster diversity and sustainability. They operate and communicate ethically, professionally, and with the participation of communities, offering varied experiences for education, enjoyment, reflection and knowledge sharing<sup>2</sup>.

This definition reflects the changing role of museums in society and includes concepts such as inclusivity, accessibility, diversity, sustainability, and ethics. The definition emphasizes that museums are in service to society and operate for the public good. Cultural heritage includes artefacts, monuments, a group of buildings and sites, and museums that have a diversity of values including symbolic, historic, artistic, aesthetic, ethnological or anthropological, scientific, and social significance. It includes Tangible Heritage (movable, immobile, and underwater), Intangible Cultural Heritage (ICH) embedded into cultural, and natural heritage artefacts, sites or monuments. The definition excludes ICH related to other cultural domains such as festivals, celebrations, etc. It primarily covers industrial heritage and cave paintings.<sup>3</sup>

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<sup>2</sup> Taken from: <https://icom.museum/en/resources/standards-guidelines/museum-definition/>

<sup>3</sup> Taken from: UNESCO Institute for Statistics, 2009 UNESCO Framework for Cultural Statistics

Based on this UNESCO's and ICOM definition, Cultural Heritage Sites, as part of cultural heritage, could be defined as relevant places (physical locations, structures, or landscapes) that possess cultural, historical, or natural value, like for instance archaeological sites, historic buildings, monuments, landscapes, and sacred sites.

Cultural heritage sites are important in preserving and promoting our collective heritage because they contribute to a sense of identity and belonging, preserve history, promote understanding and tolerance, provide economic benefits, and contribute to conflict prevention and reconciliation.

The UNESCO also identifies and recognizes exceptional cultural heritage sites through its World Heritage List<sup>4</sup> that includes sites having cultural, historical, scientific, or other forms of significance. The sites are judged to contain "cultural and natural heritage around the world considered to be of outstanding value to humanity".

Finally, museums and cultural heritage sites are interconnected entities that mutually contribute to the preservation, interpretation, and presentation of our cultural heritage. Understanding their distinct characteristics and fostering collaborations between them are essential for cultural heritage professionals. By harnessing the potential of museums within cultural heritage sites and promoting meaningful visitor engagement, professionals can enhance the appreciation and safeguarding of our collective heritage for future generations.

According to the UNWTO, Cultural Tourism would be defined as:

A type of tourism activity in which the visitor's essential motivation is to learn, discover, experience, and consume the tangible and intangible cultural attractions/products in a tourist destination. These attractions/products relate to a set of distinctive material, intellectual, spiritual, and emotional features of a society that encompasses arts and architecture, historical, and cultural heritage, culinary heritage, literature, music, creative industries, and the living cultures with their lifestyles, value systems, beliefs and traditions.<sup>5</sup>

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<sup>4</sup> <https://whc.unesco.org/en/about/>

<sup>5</sup> Definition adopted by the UNWTO General Assembly, at its 22nd session (2017)

The relationship between cultural heritage and the tourism sector contributes to cultural tourism development and promotion. For museums and cultural heritage sites, it is important to include collaboration with the tourism sector in their strategic plans with the goal of visibility on the tourist market and widening the reach to new types of audiences/visitors.

Cultural Tourism is also linked with sustainability in museums and cultural heritage sites, since its stakeholders assist cultural heritage organizations to expand targeted audiences, increase visibility and to generate income for future projects. Furthermore, in the realm of cultural tourism, a pressing challenge on the horizon revolves around raising awareness regarding the environmental and social impact within cultural heritage destinations.

In light of this challenge, forging synergies with museums emerges as a pivotal component for the future management of cultural heritage. This handbook delves into the intricacies of this vital connection, offering insights and strategies for effective collaboration between the realms of cultural tourism and museums.



◆ © Eduardo Salvatier, Unsplash

## 2.2 Communication basis for collaboration between museums, cultural heritage sites and cultural tourism sector. What is it about?

Talking about communication in the cultural, museum, heritage, and tourism sectors, in common terms, involves discussing promotion, advertising, media campaigns, and publications on digital social networks. In deeper terms, as stated by the authors throughout the following chapters, communication is a transversal instrument of the organization. In addition to making the activities of the museum, heritage site, or territorial tourism visible, communication facilitates the achievement of mutual interests between professionals in the cultural and tourism sector. It establishes an organizational and sectoral scope to generate agreements and collaboration initiatives, and above all, it allows dialogue between cultural heritage and visitors.

In relation to collaboration, communication is an inherent element used to establish dialogues, competent strategies, and respectful agreements to achieve short, medium, and long-term objectives. Communication at different levels, both between professionals and institutions, generates lasting, fruitful collaborations that are nourished by professional and sectoral diversity. Sectoral diversity is one of the key components of collaboration. In the specific case of this project, the different perspectives of the sectors - museum, cultural heritage, and tourism - are crucial. Having different points of view generates divergent proposals that are adapted to the needs of each audience and market.

In another sense, communication between professionals at museum heritage sites refers to the dynamic process of exchanging information, ideas, resources, and experiences among various institutions within the cultural heritage sector. This process also allows professionals to enhance learning opportunities, cooperative projects, and practices that contribute to the growth and advancement of the museum sector on a local, national, and global scale.

By using digital social media and ICT tools, cultural heritage professionals can foster relationships and facilitate ongoing communication and information sharing among themselves. These digital tools, which include museum platforms, digital hubs, networking, and social media platforms, will be explained in detail in Chapter Three. They serve as a guide to help professionals working in the cultural heritage sector.

Communication between museums, heritage sites, and the public is another crucial aspect. The new definition of a museum, imposed by ICOM in 2022, refers to communication with the public. It encourages museums to operate and “communicate” in an ethical, professional manner, with the participation of communities, offering varied experiences for education, enjoyment, reflection, and the exchange of knowledge. The new definition also emphasizes the importance of museums being open to the public, accessible, and inclusive, promoting diversity and sustainability. These aspects must be taken into account in any museum communication policy and strategy.

As indicated in the findings of the research stage based on primary and secondary sources<sup>6</sup> conducted by the ReInHerit project, communication between cultural heritage organizations and the public has been identified as a strategic issue for a sustainable cultural heritage management, since there is a general concern among professionals about reaching audiences. Other key findings and recommendations from this research, properly explained at length in Chapter 4, will serve as a guide to help professionals working in museums and heritage sites formulate initiatives aimed at improving communication with diverse audiences, thereby fostering meaningful engagement.

As explored throughout the following chapters, museums must adopt visitor policies to win over the public, combining scientific and cultural projects with effective communication strategies that require considerations of mediation, interpretation and accessibility. Communication between museums, heritage sites and the cultural tourism sector involves the strategic exchange of information, resources and experiences between museums and entities. This collaboration aims to create mutually beneficial partnerships that enhance visitor experiences, promote local culture and heritage and boost tourism while preserving and showcasing the museums' rich historical and artistic offering.

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<sup>6</sup> The ReInHerit project conducted primary research, collecting qualitative and quantitative data to understand current practices in the cultural heritage sector, particularly in communication, collaboration, and digital innovation. This research identified challenges and needs in areas like sustainability, digital technology, and audience engagement. The secondary research focused on reviewing relevant academic literature to position the project. Data collection for the research involved two questionnaires, one for heritage professionals (886 responses) and one for visitors (2481 responses from 37 European countries), gathered between October and December 2021. Additionally, focus groups were held for heritage professionals in May 2021 and March 2022, involving 72 participants from over 12 European countries. The findings described can be consulted throughout the project's internal reports, reflected in various deliverables.

## 2.3 Challenges and opportunities for communication and collaboration in the cultural heritage sector

The cultural heritage sector in the European Union offers a wide range of opportunities not only for the regeneration of society, but also for strengthening economic sustainability, due to its capacity to mobilize the economy of small and large regions. To highlight the above we can note that cultural tourism accounts for 40% of all tourism activities in Europe and 40% of World Heritage properties are located in the territory of EU Member States.

As emphasized by European treaties and policies<sup>7</sup> from the last fifteen years , the cultural heritage sector has also a crucial role to play in social and environmental sustainability. Aligned with rapid societal changes, cultural heritage has been reconceptualized as a resource and process that can make a positive contribution to forming inclusive, peaceful and sustainable societies, as well as to raise environmental awareness and support sustainable practices in the management of museums and heritage sites.

In this context, it has become necessary for museums and heritage sites to redefine their role and convince the various communities of their value in contemporary societies. This has led to calls for democratized and value-based approaches to heritage management that consist of bottom-up methodologies with multiple forms of knowledge and epistemologies.

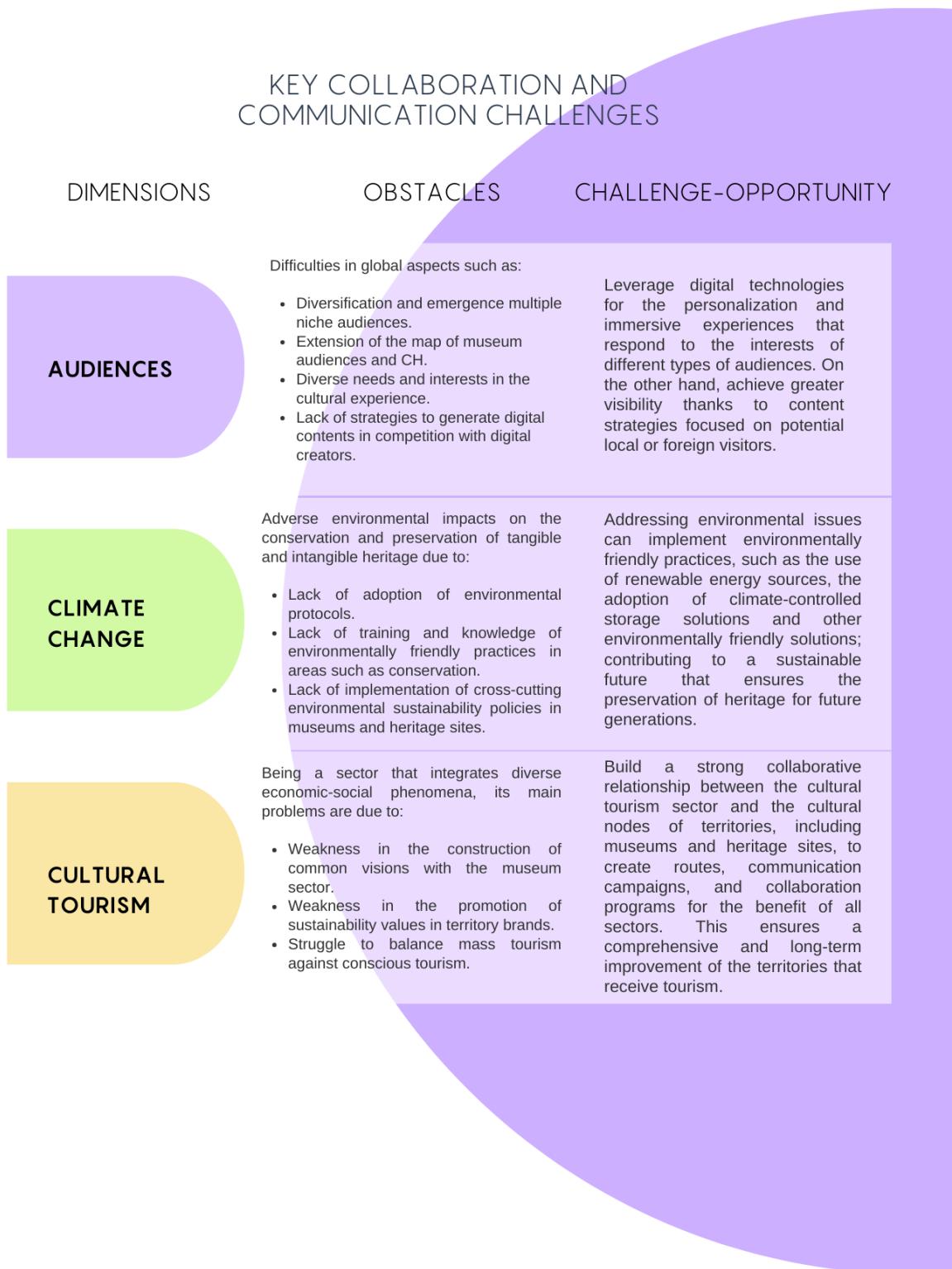
The extensive desk research conducted by the ReInHerit project has identified seven dimensions of key collaboration and communication challenges arising from this radical transformation of the cultural heritage sector across Europe. Addressing these challenges calls for the swift embrace of sustainable collaboration practices, which not only tackles the sector's pressing issues but also present significant opportunities. These practices empower the sector to adeptly respond to its shifting landscape, strengthen its resilience, and make a valuable contribution to society, all while safeguarding and promoting our rich cultural heritage. To summarize the main challenges and opportunities, it is useful to consult the following tables where some of the most relevant are listed.

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<sup>7</sup> Idem 7

## KEY COLLABORATION AND COMMUNICATION CHALLENGES





## 2.4 Make it your own!

As explained in this section, one of the most important promotions for museums, sites, world heritage and cultural tourism is to approach them as sectors that feed off each other in which the various communication processes help to achieve synergies and improve the link between cultural heritage and visitor. We offer you a brief list of statements to reflect on individually or in groups regarding the importance of communication and collaboration. We suggest taking a few minutes and discussing each other's responses and perspectives in groups.

LET'S DISCUSS	CHECK		
	Agree	I'm not convinced	In disagreement
Communication is a transversal element of the organization, whether it is a museum, heritage site or tourism sector.			
Collaboration translates into the cooperation of different sectors, institutions and also in recognizing the internal needs of our team to improve aspects of daily work and improve our knowledge and that of our colleagues.			
Cultural and sustainable tourism has common interests with those of museums and heritage sites, which is why we must look for initiatives to enrich both sectors.			



# 3

COMMUNICATION AND COLLABORATION,  
IMPROVING MANAGEMENT TOOLS  
FOR PROFESSIONALS

### 3 Communication and collaboration tools to improve management for professionals

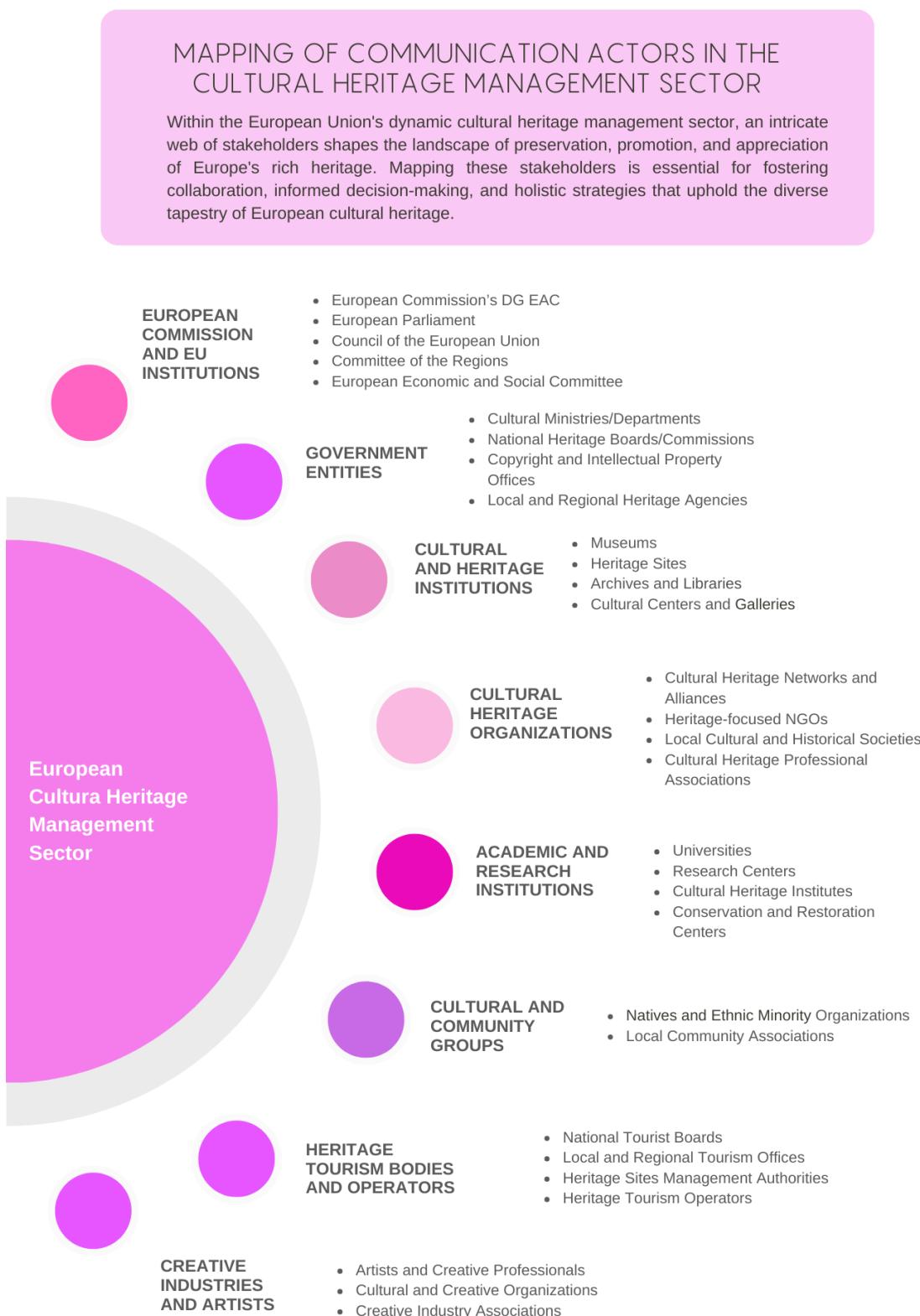
#### 3.1 Mapping of communication actors in the cultural heritage management sector

For implementing effective communication and collaboration channels, it is important to identify the relevant actors in the coordination and execution of projects and programs, as they are the driving agents of regional change. Identifying these actors in each of the circumstances and programs that may arise helps to set up scenarios that respond to the needs of managers and professionals, as well as to establish coherent and concrete objectives based on the capacity for action in communication and cooperation.

In the European context, the map helps to understand the variety of existing actors, showing the complexity and extent of the cultural or cultural heritage sector that can build new dynamics of cooperation and communication. As distinguished on the map proposed by this project, agents from government sectors are identified, but also from the social, academic or tourist sectors. This shows the important transversally that initiatives can achieve and how they can have an impact beyond museum institutions and cultural heritage. Reflecting and acting from the perspective of a map of actors allows us to visualize the sociocultural impact that various initiatives can have. For example, in the creation of social capital from cultural heritage or in the development and professionalization of small cities and territories, among others.

On the other hand, the map of audiences, such as the one shown on the following page, can facilitate the identification of the different professionals, the areas in which they can collaborate and transform communication into actions for the benefit of cultural heritage in all its expressions. A map is a visual structure that facilitates the prioritization of collaborations and communication between different professional profiles for the pursuit of common objectives.

In the current global context, the map of audiences will always be modified according to strategic objectives and processes. Therefore, it is vital to frequently review the relevance of the actors identified in the map we draw up according to geopolitical and temporal needs for the promotion of joint initiatives. The design of an actors' map should be formulated as a phase prior to the design of any cooperation and communication initiative, distinguishing precisely the names of the regional institutions that can actively contribute to the strengthening of the projects in the territory on which they will have an effect.



### 3.2 Communication on digital social media and digital platforms for cultural heritage professionals

By Nefeli Bantela and Eleni Markou

One of the most important assets of museums and heritage sites are their professionals; a long list of experts is involved daily in all the tasks that heritage requires to maintain its optimal state and find solutions to everyday problems in the field. The great importance of human capital in museums makes it necessary to reflect on the relevance of the networks that can be built among professionals in the sector through digital platforms.

Information and communication technologies allow people with similar interests to meet, and museum and cultural heritage professionals as a collective can find in them a space for the exchange of knowledge and the search for cooperation with other professionals. The dynamization of professional networks in digital media does not differ much from traditional professional networks in the strict sense that is a search for professionals, and trusted experts with the aim of exchanging experiences and generating bonds of mutual cooperation.

However, it facilitates several aspects of communication, collaboration and knowledge sharing. According to the European Commission's quick guide on communication, dissemination and exploitation, communication is a means to promote your organization's actions and results. Communication platforms are valuable in fostering communication and collaboration among professionals because:

- They allow professionals from different latitudes to meet.
- They facilitate the exchange of information on specialized topics in the fields of culture and conservation.
- Facilitate the renewal of knowledge in digital skills, hard skills and specialized technical skills more quickly.
- Create collaborative networks for the possible solution of similar problems.
- Facilitate remote workspaces
- Simplify communication processes to find professionals in related work areas.
- Provide for the opening of points of view and constructive debate on the present and future of cultural management and museum management.
- Help create links between professionals and institutions in order to plan collaborations.

According to the European Commission's quick guide on communication<sup>8</sup>, dissemination and exploitation, communication is a means to promote the action and results of your organization. Well-established communications are valuable to promote communication and collaboration, from this source we can rescue steps for communication between professionals:



<sup>8</sup> [https://ec.europa.eu/research/participants/docs/h2020-funding-guide/imgs/quick-guide\\_diss-expl\\_en.pdf](https://ec.europa.eu/research/participants/docs/h2020-funding-guide/imgs/quick-guide_diss-expl_en.pdf)

At the same time, the digital transformation of all sectors forces cultural heritage and museum professionals to renew their technical skills, for which digital tools can be an instrument to implement an internal culture of digital agility among professionals. It facilitates the opening of points of view and constructive discussion regarding the present and future of cultural management and museum management. In this regard, digital platforms such as specialized forums, digital congresses, local, national or international museum networks, webinars, podcasts, digital hubs, and virtual courses for professionals can contribute to this task. Taking the above into account, there are key aspects that any digital professional network for professionals, for example, must pursue:

- Be multidisciplinary.
- Develop appropriate content in terms of topics and current affairs.
- Offer opportunities for exchange between different types of professionals.
- Be a safe space for the exchange of ideas.
- Take into account junior and senior profiles.
- Focus on making the organization use digital to strengthen its mission.
- Possess a horizontal and real-time conversation system.

As was done in the ReInHerit project with its content strategy, it is essential to mention that traditional digital social networks are conduits for finding specialized content initiatives for professionals with the same visibility as professional networks. In this sense, in addition to the most popular networks for professionals such as LinkedIn, current communication trends show an openness to specialized content generators who can generate content as experts in the areas in which they work. It is therefore very timely to encourage professionals within museums and heritage sites to be promoters of their knowledge on digital platforms, as they are a conduit of informal knowledge.

## TIPS TO FACILITATE COMMUNICATION BETWEEN PROFESSIONALS

1

### DIGITAL HUB

- Make your digital hub user-friendly and a platform anyone can easily navigate intuitively.
- Include training methods for digital upskilling and reskilling of cultural heritage professionals that will facilitate the digital turn in cultural heritage management.
- Moderate the conversations in the Forum so chat sessions become productive and fulfilling for all participants.

2

### WEBSITE

- Remember that the website needs to be dynamic and active.
- All types of content need to be generated having the desired target audiences in mind.
- A good idea is to connect your social media accounts to your website.
- Create a section with the most recent and important events.
- Write blog posts frequently – your audience is always willing to learn something new.

3

### DIGITAL SOCIAL MEDIA

- Make sure your social media channels are audience centered.
- Set clear KPI's for each semester and monitor them. If needed, decide on actions which will enhance your channels.
- Distribute across different channels.
- Choose a specific tone of voice.
- Share high quality images, videos and reels.
- Encourage interaction and content sharing with the audience.
- Post frequently and make your content brief and concise.

4

### WEBINARS

- Make sure that you choose speakers who are experts in their field.
- Make webinars practical including interactive parts such as questionnaires and quizzes.
- Use a reliable and professional platform to facilitate the webinars.
- When choosing the speakers, reach out to schools, municipalities, ministries, and NGOs to co-produce key actions that will strengthen the content of the webinars and will contribute to the creation of a strong network.
- Aim at the increase of public awareness of the sector's work and importance.
- Facilitate accessibility of research analysis and findings on technology and heritage to the media and broader society.

5

### PODCASTS

- Always remember that your target audience is the general public – avoid jargon and make podcasts easily digestible.
- Know well your invitees. Before the podcast, it would be good to have a thorough discussion and get familiar with what they would like to discuss and even their tone of speech.

While the digital channels that can be applied to networking among professionals are the same as for other audiences, the distinction will be the type of content and the end goals. For professionals, the usefulness of digital channels is in:

- Developing long-term cross-sectoral collaboration strategies.
- Creating spaces of solidarity for the discussion of cardinal issues among professionals in the area.
- Promoting knowledge of new forms of management and work techniques among institutions in other regions.
- Strengthening the personal brand of the professional experts of the institutions in the sector.

In sum, digital platforms facilitate some aspects of networking for professionals, as mentioned at the beginning of the chapter; however, the importance of the unique value of face-to-face exchange between professionals remains a key element in building solid relationships between junior and senior cultural heritage profiles and museums.



**Museum Network and digital strategies for professionals**

In addition to the content for professionals that can be found on networks such as LinkedIn, there are specialized networks in the museum sector, heritage and digitization, such as REMED (Red de Museos y Estrategias Digitales), an initiative of the Universidad Politécnica de Valencia which aims to connect knowledge and professionals in Europe and Latin America.  
More information:  
<https://remed.webs.upv.es/>

### 3.3 Types of collaboration between museums, heritage and cultural tourism

*Jaime Lopez*

Collaboration has become an essential strategy for museums worldwide to overcome the challenges posed by limited resources, changing visitor expectations, and the need for continuous innovation. This Handbook explores the concept of collaboration between museums / cultural heritage sites, including the cultural tourism sector, its benefits, challenges, various forms, and practical considerations for successful partnerships.

Collaboration between museums and heritage sites refers to the intentional and strategic working relationship established between two or more museums or heritage sites, of any size and type, to achieve common goals, share knowledge and resources, and create innovative initiatives. This practice can be highly beneficial, fostering synergy and enhancing the overall capabilities of participating museums. In the context of museum studies, various forms of collaboration between museums have been identified to achieve common goals and enhance the impact of their work. Here are five forms of collaboration<sup>9</sup> that can be prioritized according to the particular needs of each organization:

- Consortium: This is a formal and long-term collaboration between multiple museums, often from different regions or countries, to work together on shared initiatives. These collaborations often focus on addressing common issues faced by museums, such as professional development, fundraising, advocacy, joint marketing initiatives, or the development of collective projects for broader impact.
- Dialogue and knowledge sharing: Involves museums engaging in dialogue and exchanging ideas, best practices, and experiences. This form of collaboration can be informal or structured, such as through workshops, conferences, or virtual meetings. By fostering open communication, museums can learn from each other and improve their operations and offerings.
- Network: They are less formal and have a more flexible structure. Networks consist of a loosely connected group of museums or cultural institutions that come together voluntarily with the primary purpose of

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<sup>9</sup> Some of which are discussed in detail in Chapter 3.2

information sharing, collaboration, knowledge exchange, or collective advocacy. Networks may not have specific projects as their primary focus.

- Outsourcing: Refers to the practice of one museum seeking external assistance from another museum or organization to fulfill a specific task or service. This collaboration allows museums to tap into specialized skills or resources that they might not possess in-house.
- Partnership: involves a formal agreement between two or more museums to work together on a specific project or initiative. The partnership is usually focused on a specific goal and may have a defined timeframe. This could include joint exhibitions, co-curated displays, or collaborative research projects.

It is also important to note that although the specific processes of collaboration between museums may vary depending on the unique context, goals, and needs of each museum, the general process of collaboration involves careful idea generation, effective identification of decision-makers, seamless communication, and concerted efforts towards implementation. This structured approach fosters a sense of ownership and commitment among the participating museums, leading to a successful and rewarding collaborative experience. By following these key steps, museums can unlock the full potential of collaboration and harness collective strengths to advance their shared mission of preserving and promoting cultural heritage.

On the other hand, collaboration between the cultural heritage tourism sector and museums is about working together to promote and preserve cultural heritage sites and artefacts, while also enhancing the visitor experience. This type of collaboration can take many forms including the following:

- Joint marketing efforts: The cultural heritage tourism sector and museums can work together to promote their shared goals through joint marketing efforts. This can include cross-promotion of events and exhibits, as well as coordinated advertising campaigns.
- Shared programming: Collaboration between the cultural heritage tourism sector and museums can also involve shared programming initiatives. For example, museums can offer guided tours of nearby cultural heritage sites, or the cultural heritage tourism sector can organize events that incorporate museum exhibits or collections.

- Coordinated educational initiatives: Collaboration between the cultural heritage tourism sector and museums can also involve coordinated educational initiatives. This can include joint educational programs for schools or community groups, as well as shared resources for visitors such as brochures or audio guides.
- Preservation of cultural heritage: Collaboration between the cultural heritage tourism sector and museums is also important for the preservation of cultural heritage sites and artefacts. Museums can provide expertise in conservation and preservation, while the cultural heritage tourism sector can help to raise awareness and support for these efforts.
- Sustainable tourism initiatives: Museums actively promote sustainable tourism practices by leveraging the rich cultural assets and historical significance of heritage sites. It encourages responsible travel that respects local cultures, environments, and traditions. Heritage preservation efforts extend to sustainable resource management, minimizing the ecological footprint of tourism activities, and fostering a deeper appreciation for the natural and cultural environments.

Overall, museums and heritage sites play a pivotal role in shaping and enhancing the sustainability, digitization, and resilience of the tourism sector. Its unique capacity to foster innovative tourism experiences centred around cultural heritage, traditions, arts, and authentic cultural encounters significantly contributes to these goals.

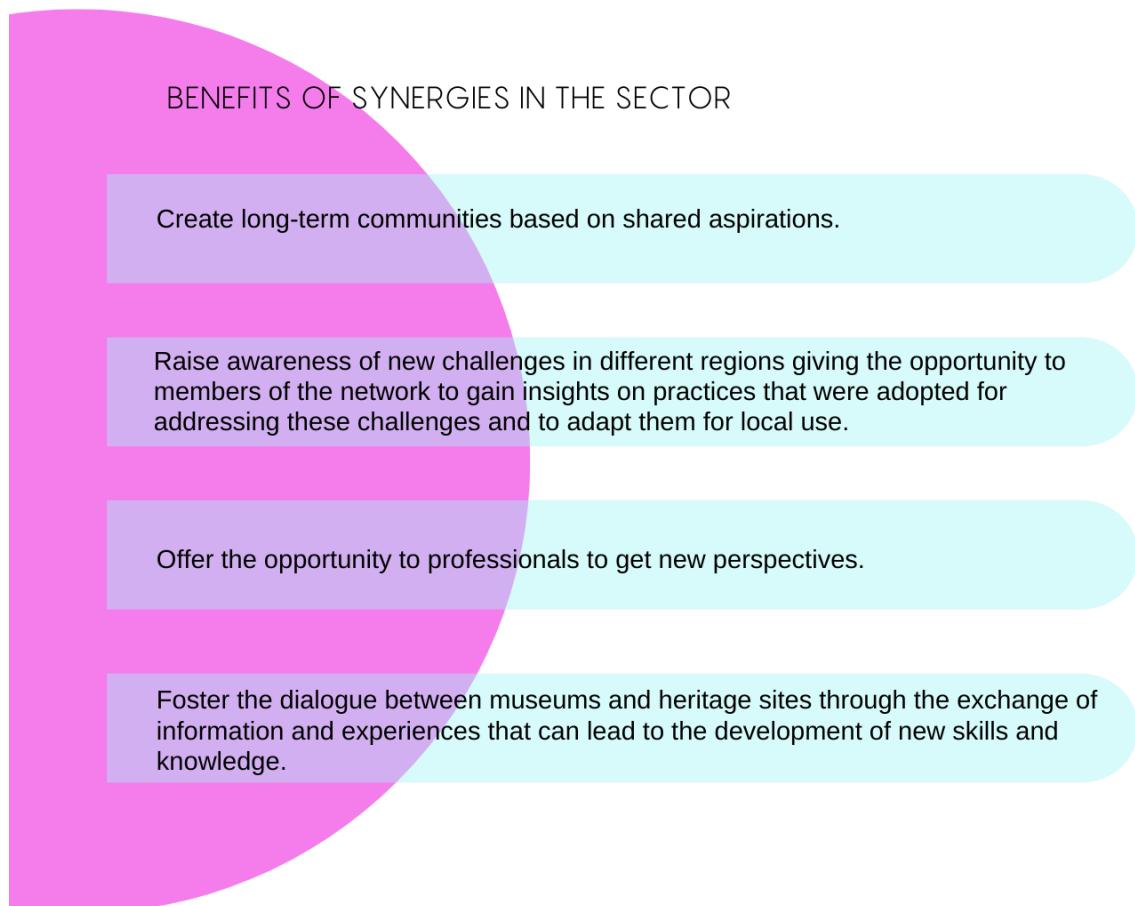


▲ © Alexander Kagan, Unsplash

### 3.2.1 Partnerships and Networks

By Polina Nicolau

As noted in the previous section, associations and networks are two important forms of collaboration in the sustainable management of cultural heritage, since they allow professionals with different types of experience and jobs to share resources, exchange ideas and best practices. Having these synergies with different museums and heritage sites on a local, regional and international scale creates a stronger heritage sector with greater capacity for innovation, some of the most relevant benefits are listed in the following figure:



On the other hand, among the main motivations for a museum to collaborate, the following can be highlighted:

- Complementing museum workforce: Collaboration between museums offers the advantage of pooling human resources and expertise. Often, museums have limited staff capacities and diverse demands ranging from exhibition curation, conservation, educational programs, and administrative tasks. By collaborating, museums can share their specialized staff, ensuring that each institution benefits from a broader skillset. This not only enhances operational efficiency but also enables museums to tackle more ambitious projects that may have been challenging to undertake individually due to resource constraints.
  
- Compensating for lack of expertise: Museums often face the challenge of having limited access to certain knowledge or expertise, especially when it comes to topics such as digitisation. Collaboration between museums allows for the sharing of information, research results and expertise. This cooperative approach fosters a broader understanding of various topics and stimulates scholarly advances. It also ensures that visitors receive comprehensive and up-to-date information, enhancing the quality of educational experiences offered by museums.
  
- Improving Demand-Driven Innovation: In the dynamic world of museums, catering to the evolving demands and interests of visitors is crucial for sustained success. Collaborative efforts provide museums with the means to gather collective data and insights from a wider audience, leading to a better understanding of visitor preferences and trends. Armed with this information, museums can develop innovative programs, exhibits, and events that resonate with their audiences, thereby increasing visitor engagement and satisfaction.



The European Heritage Alliance is an informal platform of 51 European and international networks active in the wider field of heritage. It brings together civil society, historic cities and villages, educational institutions, museums and similar organisations. The aim is to advocate collaboratively for cultural heritage.

Building long-term partnerships necessitates organizations that have a proactive and open-minded mindset that is open to change and growth. Start at the level of the museum or heritage site and begin building connections with different internal staff groups. This could mean changing roles or working with different professionals to expand the different skills required in a cultural organization and their role. At the regional and international level, partnerships can be formed with the co-organization of events that will include external staff groups from other museums and heritage sites, freelancers, consultants, and different stakeholders.

Public-private partnerships have become prevalent in the conservation of cultural heritage such as historic urban landscape. Archaeological sites, buildings, museum collections, and natural areas of heritage significance. The conservation of cultural heritage requires a multidisciplinary approach covering economic, social, and environmental strategies with stakeholders from the private and public sectors.

The Getty Conservation Institute issued a comprehensive report in 2014, addressing the various aspects related to public-private partnerships. According to this report, the private sector, which includes businesses and investor organizations, "contributes to the provision of a public facility or service by offering or funding operational leadership" under a contractual agreement with the public sector, encompassing one or all levels of government. These partnerships have grown as a "strategy for the government to handle the escalating costs and responsibilities of services or ventures traditionally managed by the public sector" (Macdonald and Cheong 2014, 2).

Incentives from the public sector are essential to encourage private sector investment in heritage, such as financial incentives in the form of tax breaks. Concurrently, discussions on ESG materiality have brought businesses closer to heritage. A public-private partnership can be considered "strong" if there is a balance between partners in terms of decision-making, resources, costs, and risk management. Despite the debates surrounding their successes and failures, these partnerships are on the rise as they offer funding, personnel, skills, and resources to tackle the challenges in conserving cultural heritage.



#### **"Out of the box" approach to networking**

It is important to incorporate an "out of the box" approach to creating these networks by reaching out to professionals with different kinds of expertise across geographical boundaries to create multi-disciplinary teams. An "out of the box" approach also means to participate in joint activities that don't require the investment of many resources, such as social media campaigns, participating in study-visits and working sessions, being a minor or associate partner in an EU funded project. The aim is to create new ideas and see how a partnership can evolve.

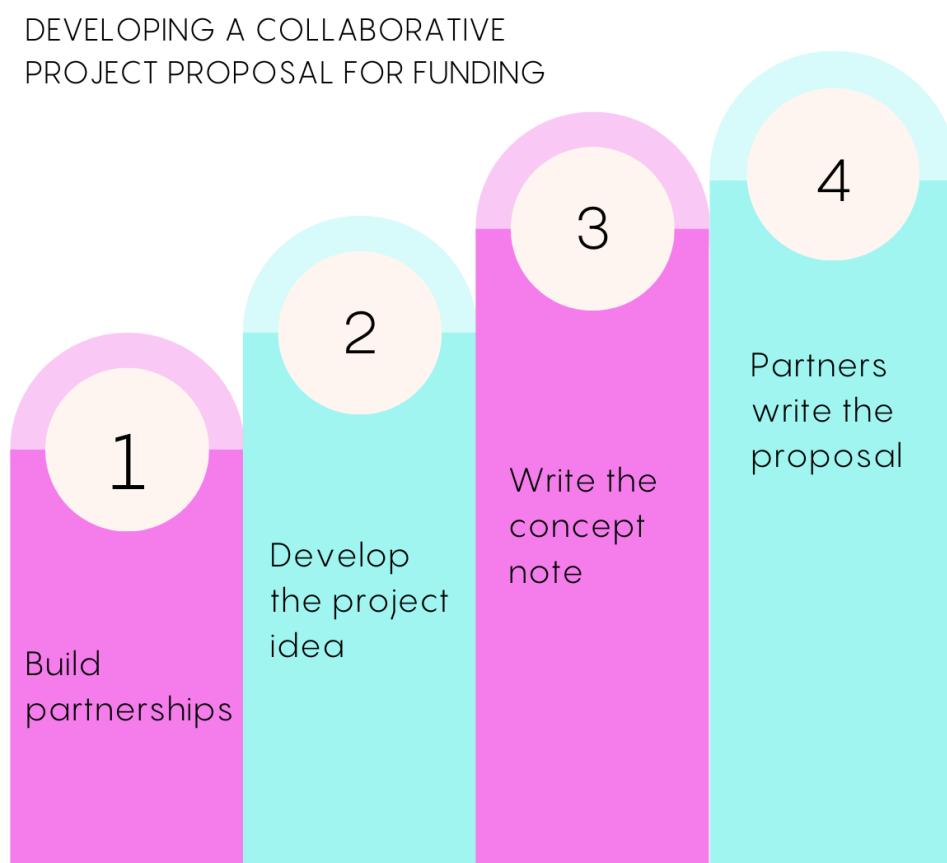
### 3.2.2 Sources of funding

By Polina Nicolau

Collaborating between museums to get funding together can be an effective strategy to access financial resources for joint projects, exhibitions, or initiatives. Carrying out this arduous task entails identifying potential funding sources, including government grants, private foundations, corporate sponsorships, and philanthropic donors, that support projects that explicitly encourage museums collaboration.

In this respect, it is worth mentioning that the European Union offers a variety of funding opportunities for projects and programs, that include grants, which are typically awarded through competitive proposals. Submitting joint grant applications is an effective way to obtain funding between museums as it can increase the chances of success, as funders are often more likely to support collaborative projects.

As explained in Chapter 3.2.1 partnerships and networks enable museums and heritage sites to participate in collaborative projects that transcend geographical scales and disciplines. The following outlines the different steps that must be followed for an idea to become a project proposal and obtain financing to implement it.



1. Build partnerships: The first step for developing successful project proposals is finding partners with shared values, aspirations, and respect from your existing partnerships and networks.
2. Develop the project idea: Identify the needs of the organization and develop them into a project idea. Search for a funding program that is suitable to the project idea using different online platforms that publish the relevant calls for proposals. The project proposal should contribute to the funding program's priorities, which correspond to the European Commission's policies. The European Commission's funding programs (such as Erasmus+, Horizon Europe and Creative Europe) offer different funding schemes that are suitable for museums and heritage sites. All organizations applying for EU funding need to be registered on the relevant platform. The European Commission's funding programs (such as Erasmus+, Horizon Europe and Creative Europe) offer different funding schemes that are suitable for museums and heritage sites.
3. Write the concept note: Develop a short executive note and send it to members of your partnership to how it resonates with other organizations.
4. Partners write the proposal: Writing the proposal requires the engagement of all involved parties at different levels, depending on the coordinator. All partners should be involved in writing the different sections of the proposal (rationale, objectives and how these objectives are delivered by the activities in the implementation, budget) to be collectively discussed and agreed upon. Having a shared vision of the project with your partners is a key component of the proposal.

Some of the main challenges in the grant application process, to be taken into account and foreseen are the following among them we can highlight:

- Project proposals require systematic planning as the work plan needs to be detailed in terms of timeframe, activities and budget for the duration of the project. For the EU funded projects, the project proposal, if accepted, becomes the content of the grant agreement signed between the partners and the European Commission.
- Create shared ownership of the project by bringing together organizations with complementary know-how and by developing a project that reflects their values and priorities.
- The grant application process requires the engagement of an organization's

resources in terms of time and personnel.

- Establish clear communication lines between the partners from the stage of the proposal writing.
- Each funding program has specific requirements in terms of eligibility and project activities, among others.

To learn the specificities of an EU funding scheme requires many resources in terms of time and personnel and it is important to note that most of the learning process takes place through hands-on experience. A good starting point is to be part of a project as a minor or associate partner in projects coordinated by experienced and trusted partners from existing networks.

The participation in small scale projects under Erasmus + and Creative Europe (can provide small organizations with valuable experience and insights on how EU funded projects work. In this way, they can start building a project portfolio and solid collaborators base that can, gradually, lead to bigger projects such as Horizon Europe, the EU's current key funding program on research and innovation, which are more demanding in terms of administration, finance and personnel. If an organization is not part of a network, project partners can be found through the funding platforms or the national contact points.



The Network of European Museum Organizations has members with extensive experience in collaborative EU funded projects. It has developed a toolkit that guides cultural heritage organizations through the grant application process, from developing a project idea to a successful proposal and implementation. It also shares successful collaborative EU- funded projects.

Fundraising is another alternative for museums and heritage sites in which they can raise funds through different channels, such as donations, membership programs and collaboration with local/regional organizations and/or entrepreneurs. There are three main alternatives to implement fundraising as shown below:

## THREE FUNDRAISING ALTERNATIVES

### DONATIONS

1

Donations refer to the financial contributions made by individuals, businesses and other entities to support museums and heritage sites. There are different types of financial donations (such as endowments, one-time or recurring donations) which can be used to fund various activities and operational expenses of the museum/cultural heritage. Tracking donation patterns (size, motivations such as tax refund or passion for culture, and frequency) is important for museums/heritage sites to anticipate funding fluctuations, plan and customize fundraising strategies. An important strategy is to cultivate relationships with donors (such as gala dinners) to keep them engaged and inform them of their contributions' impact.

### MEMBERSHIP

2

Membership schemes are another channel for raising funds. These are programs for encouraging people to become members of their local museum and enjoy various benefits (such as free or discounted admission, exclusive access to exhibitions or events, priority registration for programs and discounts at the museum shop or cafeteria). Members of these schemes pay a recurring fee (often annually) and usually there are different membership tiers, each tier with its own benefits. Membership schemes contribute to the creation of a loyal and committed audience leading to a sustained revenue source and potentially increasing donation patterns. For creating and maintaining a successful membership scheme effective communication and engagement strategies are crucial. Key activities in these strategies could be regular updates on the museum/cultural heritage site's events, members-only events, and behind-the-scenes access events for members.

### ENTREPRENEURS

3

Entrepreneurs and other local/regional organizations are valuable partners in enhancing engagement with communities and supporters by developing unique exhibitions and events, which can increase the visibility and attendance for museums and cultural heritage sites. This type of collaboration can include sponsorships of exhibitions or events by businesses. To create effective collaboration with entrepreneurs, businesses and other regional/local organizations, clear communication and shared vision is required.

In addition to the options mentioned above, it should not be forgotten that there are other methods of fundraising that adhere to the museum's code of ethics. In this way, actions with other organizations, associations of friends of the museum, special events, research of donation patterns, crowdfunding, micro donation, etc. can contribute to supplementary help in specific actions. Whether it is a public or private source, keeping a clearly defined communication and administration axis and alert of the possible sources of help can be useful.

"Identify the needs of the organization and develop them into a project idea"



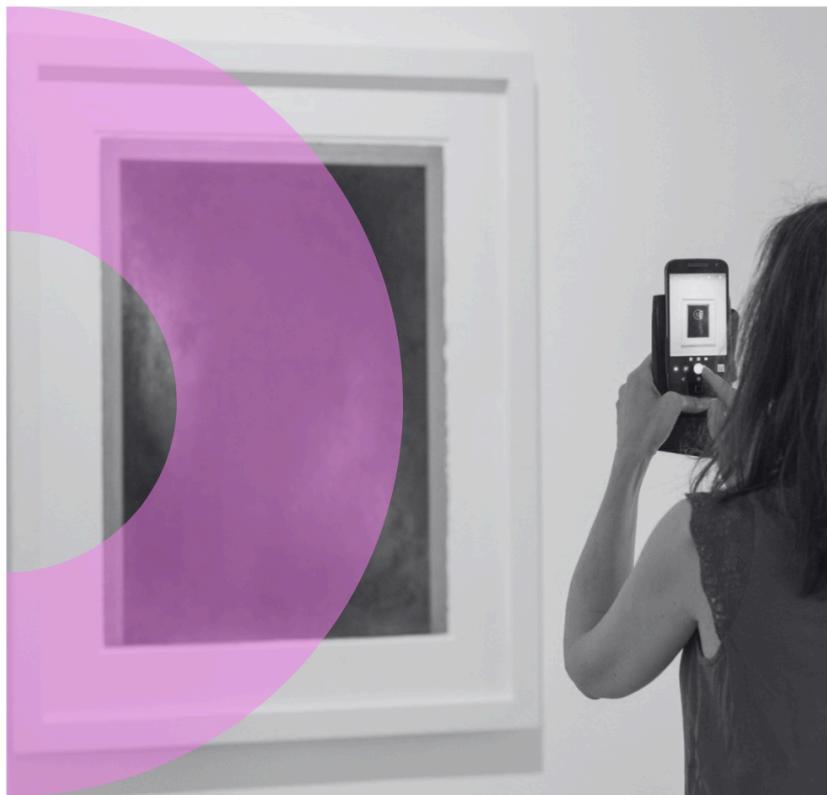
© John Schnobrich, Unsplash

### 3.2.3 Knowledge sharing

By Polina Nicolau

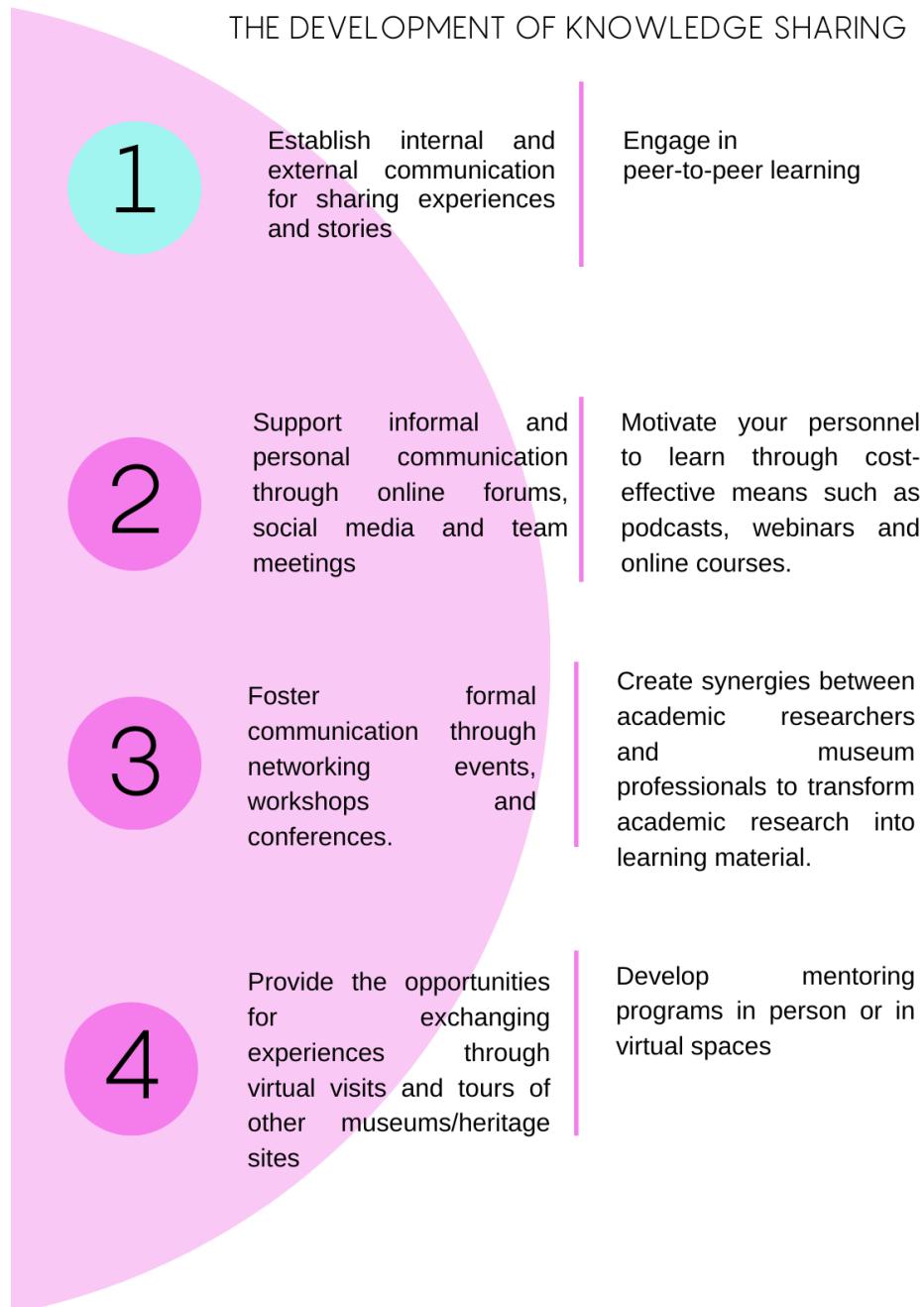
This is a period of rapid transitions brought by the climate crisis, digital technology, demographic changes, and the coronavirus pandemic. These transitions have affected cultural heritage professionals who are now required to constantly improve their existing skills and knowledge. This is reflected in the European Year of Skills 2023 efforts to promote skills development.

The improvement of knowledge and skills through lifelong learning is of high importance for the sustainable management of museums and heritage sites. A cultural heritage management plan should include education, training, and skills for increasing an organisation's operational efficiency by enabling its personnel to keep up with practices and new requirements brought by the green and digital transitions, and social transformations.

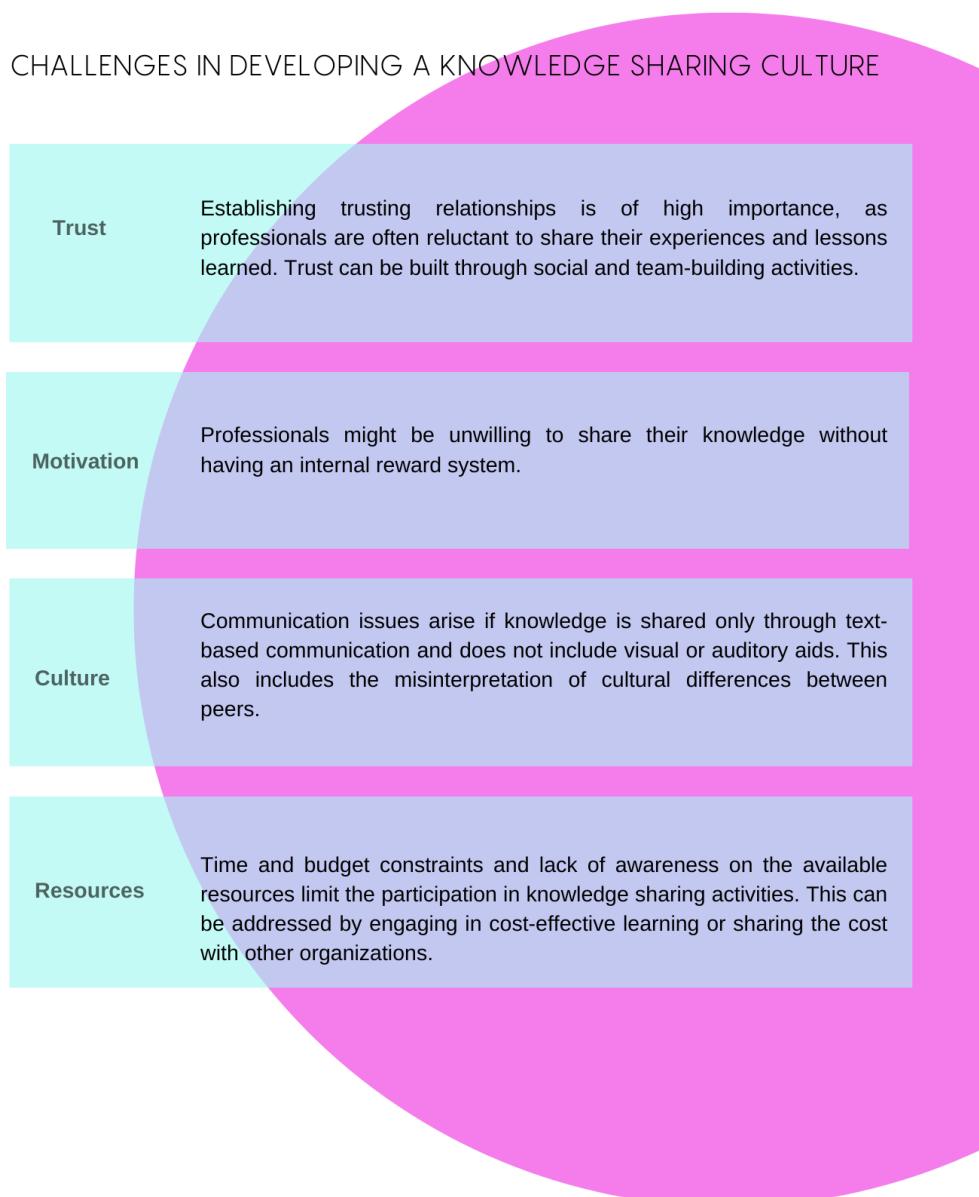


© Graz museum

Knowledge sharing is a key process that can enhance organizational performance, decision-making and innovation. This process consists of exchanging information, insights and experiences among professionals. The development of knowledge sharing culture in museums and heritage sites can be implemented by the following actions:



The key challenges in creating a knowledge sharing culture within an organization can be grouped in four categories: trust, motivation, culture, and resources. An organization needs to be aware of these challenges when planning its knowledge sharing activities to maximize their impact. Investments must be made for addressing these challenges; this means creating a working environment that encourages employees to collaborate on a routine basis to allow them to become colleagues not competitors.



To establish trust, it is positive for the organization to create an open dialogue policy where co-workers are encouraged to get to know each other by providing them with opportunities to interact (for example, organizing social events); feel free to share your knowledge; and inform them about the personal growth that can be achieved by sharing knowledge. Share top-down content, i.e. organizations' policies and provide training on knowledge sharing regulations.

To cultivate culture, provide training opportunities for professionals on how to create content aimed at diverse audiences and how to consider ethics in this process. A mentorship program where experienced and new professionals interact and learn from each other. This will encourage the exchange of constructive feedback and will help them in delivering content that considers diversity and inclusion.

To enhance resources, develop a knowledge sharing plan which will consider time and budget constraints, schedule of meetings, and lack of awareness on the available resources. A cloud-based knowledge sharing platform where this information can be organized and shared; this will streamline the flow of knowledge based on the allocated resources.

Partnerships can be effective in enhancing resources; for example, the cost of participating with partners in training programs can be shared or joint activities can be organized for exchanging specialized know-how. It is necessary for the heritage sector to participate in the broader digital and green transformation, so investing in knowledge sharing activities in digital technologies, sustainability and climate crisis is becoming a requirement.



A useful example is that of the Museum Professionals Network, which is a peer-focused network for facilitating knowledge sharing, exploring unexpected fields and modes of collaboration, and fostering peer-to-peer consultation across Greece and internationally. The Museum Professionals Network was initiated the alumni of the Transforming Future Museums Academy organized by the British Council in 2016 with the following principles: peer-to-peer contact and learning, sharing knowledge, exchanging good practice, and encouraging openness, writing and sharing; reflecting on projects and their impact, fostering working cultures and collaborations with museums and networks within and beyond Greece. A key platform for members to interact with each other is the Museum Professionals Network Facebook page.

### 3.2.4 Collections care and research

By Nefeli Bantela, Catalin Betz, Eleni Markou, and Antonia Nussmüller

Museums and heritage sites are an integral part of cultural heritage and can foster intercultural dialogue, learning, and playing an important role in the promotion of knowledge, achievement of social cohesion and sustainable development of our societies. Cultural heritage research and conservation are essential endeavors in every museum institution. The preservation, restoration, digitization, and documentation of cultural heritage not only enable its presentation to a wide audience but also ensure its safeguarding for future generations.

In recent years and favored by digital transformation and networking, the collaborative aspect of heritage management has become increasingly important as the challenges and issues in the institutions are quite similar worldwide: Research and mapping of current needs is crucial in the cultural heritage sector. Simultaneously, the formulation of strategies for conserving heritage at both European and global scales can contribute to establishing a "sense of place," urban identity, community pride, and the targeted preservation of local heritage.



#### The case of La Gioconda del Prado

The Prado Mona Lisa, a collaborative endeavor involving the Prado Museum, the Louvre Museum, the Molecular Archeology Laboratory of Sorbonne University, and the National Gallery in London, has been the focus of extensive research and conservation projects. Beginning in 2010 as part of the research for the "L'ultime chef-d'œuvre by Léonard de Vinci" exhibition, technical analysis and restoration work on La Gioconda were initiated upon the Louvre's request. This effort successfully restored its original appearance and reaffirmed its historical and artistic significance, making it the most important rendition of La Gioconda and a vital testament to Leonardo's workshop practices. Moreover, the Prado Museum organized the 2021 exhibition "Leonardo and the copy of Mona Lisa. New approaches to the practice of the Vincian workshop," which provided fresh insights into the Vincian workshop's techniques and the copy of La Gioconda. This collaborative effort has significantly enhanced the research and conservation of Prado's La Gioconda, resulting in a deeper understanding of the artwork's historical and artistic importance.

<https://www.museodelprado.es/en/whats-on/exhibition/leonardo-and-the-copy-of-the-mona-lisa-new-e82c9d2b-7d81-5c14-cf5b-3ed5c1f587fb>

The new Sustainable Development Goals (SDGs) encompass heritage conservation and incorporate various embedded themes and issues that center around the preservation of our heritage. More specifically, goal 11 aims to “make cities and human settlements inclusive, safe, resilient and sustainable.” Within this goal, Target 11.4 aims to “strengthen efforts to protect and safeguard the world's cultural and natural heritage”.

In this context, museums and heritage sites need to collaborate among them on research projects and conservation efforts to get a deeper understanding of cultural heritage and more effective preservation strategies. To effectively carry out this collaboration between cultural heritage professionals, the following recommendations should be considered:

### **1. Foster interdisciplinarity**

Interdisciplinarity can create strong links in museums and heritage sites to reach the current challenges in the cultural heritage sector. Effective research collaboration involves multidisciplinary initiatives uniting experts, curators, historians, archaeologists, and scientists from various institutions, fostering synergies and collaboration protocols among museums, universities, and heritage organizations to advance scientific research and integrate innovative technologies for cultural heritage preservation and conservation. In this sense it is important to explore the opportunity to establish curator exchange programs museum from different countries. This initiatives enables curators from abroad to bring a fresh perspective to the collections, offering novel insights and viewpoints

### **2. Maintain and structure your (meta)data through standardization**

Structured information and the use of (meta)data standards in the museum collections database will make the data ready for search and retrieval as well as for data exchange. Maintaining the database is of vital importance, as information and data about objects are as significant as the preservation of the objects themselves. The database facilitates internal research on the objects and, of course, "opening up" the collections for external users.

### **3. Develop and utilize digital tools**

A dynamic network of organisations can be the driving force for the creation of innovative tools, which will foster a sustainable development model for the management, conservation and deeper understanding of cultural heritage. Conservation, restoration and in-depth studies of artifacts in museums are possible thanks to constantly renewed equipment as well as the use by a team of professionals of the most current analysis methods. Techniques such as macro digital photographs with visible light, photographs with ultraviolet light, IR reflectographies and radiographs, as well as a chemical analysis laboratory,

facilitate the museum's conservation research projects and collaboration with other institutions.

#### **4. Implement curatorial and conservation ethic protocols**

Museum's curators and conservators should collectively address ethical concerns related to cultural heritage, including restoration, repatriation, restitution, decolonization and cultural sensitivity. Therefore, when collaborating on research projects or conservation efforts, museum professionals should follow the ICOM Code of Ethics and other relevant codes or policies to ensure ethical conduct. Collaboration among various stakeholders can help museums implement these protocols effectively.

#### **5. Foster Continuos professional development**

Continuous professional development (CPD) between professionals from different museums through knowledge sharing benefits museum staff (specially in small and medium museums with less resources) to stay current with cultural heritage trends, acquire new expertise, and improve their professional qualifications, including digital skills. CPD activities (workshops, training programs, conferences, research, and networking opportunities) are essential in the museum practices to ensure that professionals can adapt to changing needs, incorporate best practices in their research programs and contribute effectively to the preservation and management of cultural heritage, thereby fostering innovation and excellence inside museums.

#### **6. Promote collective action and creation of networks**

As already explained in Chapter 3.2.1, the European Union funds research programs whose implementation is the result of synergies between museums and other organisations and stakeholders in the field of cultural heritage. Participation in EU funded projects such as Erasmus+, Creative Europe and Horizon Europe have enhanced research activities even on the part of institutions which may not actively engage in research outside the projects. These programmes also enhance the training of staff and promote the creation of innovative actions and tools for research and conservation of the European Cultural Heritage.



The International Council of Museums (ICOM) provides best practices to museum professionals in terms of objects acquisition, documentation of collections, accessioning standards, fundraising standards, and environmental guidelines for conservation. Adhering to these standards and guidelines can help museums implement curatorial and conservation ethic protocols.

More information:

<https://icom.museum/en/resources/standards-guidelines/>

## 7. Develop participative formats that enable crowdsourced and citizen science<sup>10</sup>

These innovative research methodologies can help to gain more knowledge and information (data) on certain cultural heritage objects or sites. With the help of such projects, not only can information or (mass) data on objects or collections be collected and saved, but an interested community that supports the local Cultural Heritage institution can also be activated. This opens up many other fields of interest for museums, e.g. new perspectives or multi-perspectivity on certain objects, exciting questions like what and how to collect the present (what does the public to preserve now for future generations?) and getting to know eye witnesses who have special knowledge on historic moments or certain objects or places. In addition, this volunteer work from the outside can also save the museum's personnel resources and costs.



### THE MUSEUMS OF IMPACT (MOI) PROJECT

The MOI project, funded by the Creative Europe program of the European Union, is an example of European collaborative cooperation in the field of cultural heritage and specifically the field of self-evaluation of museums' impact.

The project developed a self-evaluation model for European museums. The model which is now available on the official NEMO website

<https://www.ne-mo.org/about-us/resource/s/moi-self-evaluation-tool.html> helps museums to critically evaluate their operations, and develop their capacity to meet the demands of a changing, more diverse, increasingly digital and ageing society.

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<sup>10</sup>Crowdsourced and citizen science are research approaches that involve the participation of the public in data collection, experimentation, and scientific discovery. Crowdsourcing typically refers to the public's involvement in collecting data, while citizen science involves the public in conducting experiments. These approaches yield valuable and diverse datasets and actively engage individuals from outside the scientific community in the scientific research process.  
<https://www.turing.ac.uk/research/research-projects/crowdsourced-and-citizen-science>

### 3.2.5 Collections display and co-creation

*By Nefeli Bantela, Eleni Markou, Lorena González and Antonia Nussmüller*

In addition to the collection care and research, the display of objects is a priority for all museums and heritage sites. In this sense, museum collaborations are of utmost importance especially when it comes to the organization and hosting of travelling exhibitions. When a travelling exhibition is being planned, there are many questions to be answered and taken into account including the theme of the exhibition and the curatorial questions, the format in which the objects will be exhibited (digital, physical, phygital), object licenses and of course practical arrangements with collaborators such as designers, artists, architects or tech experts.

Collaboration and co-creation among different museums is always crucial in the field of cultural heritage and promotes cultural exchange. However, when it comes to travelling exhibitions involving more than one museum, there are certain parameters to be taken into account. The concept of a travelling exhibition involves objects from one museum travelling to another museum in another country in order to be showcased at a museum exhibition. Through travelling exhibitions, different museums can collaborate and showcase each other's collections either physically or digitally, opening up to a new audience. This approach comes in line with the holistic approach on Europe's cultural heritage.

As highlighted in the European Framework for Action on Cultural Heritage<sup>11</sup>, cultural heritage is regarded as a resource for the future, to be safeguarded, enhanced, and promoted, also by encouraging synergies with contemporary creation. The framework entails two clusters of actions to reinforce cultural heritage cooperation. The first cluster targets geographical zones. The second cluster of actions entails horizontal/global actions aiming at strengthening international cooperation on heritage worldwide, in the framework of EU external relations activities.

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<sup>11</sup> As per the fifth pillar of the European Framework for Action on Cultural Heritage (2019), "Cultural heritage for stronger global partnerships: reinforcing international cooperation", the European Union is committed to foster cooperation on cultural heritage.

Beyond museum level, as mentioned in the “A sustainable model of CH management state of the art report” produced in the framework of the RelInHerit project, collaboration between different stakeholders such as decision-makers and professionals and in particular joint activities between entrepreneurs, public bodies, municipalities, tourism associations, cultural partners, local communities, and the business community can play a great part in the promotion of cultural exchange. Intra-museum collaboration as a means of developing niche or audience specialization is an important aspect to consider.

Achieving effective collaboration towards the design of a successful travelling exhibition requires the following guidelines and recommendations:

1. Focus on the team dynamic. Collaboration between museums which feature different collections and focus on different time periods can be challenging yet fruitful. In addition, collaborating with international teams comprising individuals from diverse backgrounds and varying collaboration styles necessitates well-defined and transparent collaboration frameworks. For the organization of a travelling exhibition, there is need for all parties involved to agree and act upon a shared vision for their cultural destination and also enhance competitiveness.
2. Categorize exhibition planning and development in various phases: for example, after phases as proposed below.

*Phase I - Preparatory Work:* decide on the members of the core team of the exhibition development. Team bonding activities and ice-breaking sessions are recommended so as for all team members to have the opportunity to present their ideas and vision. Early on, it is important to decide on the different roles of each team member.

*Phase II - Kick-off & Prototyping:* share all the information, ideas and possible (technical) needs in a kick-off meeting and individual sessions with the exhibition team. Then first drafts, prototypes and case studies for the implementation of the pilot phase (e.g., exhibition structure, possible adaptation and architecture) are to be developed at this stage.

*Phase III - Concept and Implementation:* based on the results of the curatorial and design concepts development, the exhibition will take place at the venues.

3. Properly manage sharing of objects, data and IPR: these issues need to be foreseen by the participating organisations' data and IPR management plans as well as data protection procedures.

The final product, the Exhibitions, is owned by all the museums which participate in the development of the exhibition. All museums' material (texts, images and videos) is owned by each museum. Any other resources (e.g. technological tools, apps, etc.) to be used for the enrichment of the activities and exploitation are owned by all participating museums. For digital exhibitions and objects, access via a content management system is to be set up for the museums which contribute to the development of the exhibition. For each collaborating museum, there will be individual logins ensuring that only the museum partners – and the partners indicated by them – will contribute to its development. Each object uploaded and the digital exhibitions themselves will have a license, in line with the IPR management plan in use.

4. Reduce the environmental impact of their exhibitions. Promoting sustainability by extending the life cycle of exhibition architectural materials reduces the need for their immediate disposal, in line with the principles of reuse and recycling. Likewise, traveling exhibitions should prioritize modular architecture, favoring portability and local production, helping to reduce the carbon footprint.



©Stale Grut, Unsplash

On the other hand, in recent years, new forms of collaboration between museums in the management of collections have emerged and, in this sense, there has been a growing movement towards the decolonization of museums.

Museums are dynamic and live from plurality; they are continuously in processes of change and reflection. Museums reframe content, objects and art and constantly question not only societal changes but also their own structures and perspectives. To achieve this, it is essential to collaborate as widely as possible. Not only the exchange with other cultural institutions as museums or heritage sites, but also the exchange and collaboration with experts of other fields as well as the communities is necessary.

Other voices open up other perspectives and can lead to actualised or in-depth narratives. Collaboration can therefore help to create a more sustainable and equitable museum sector by sharing resources and expertise, to promote diversity and inclusion.

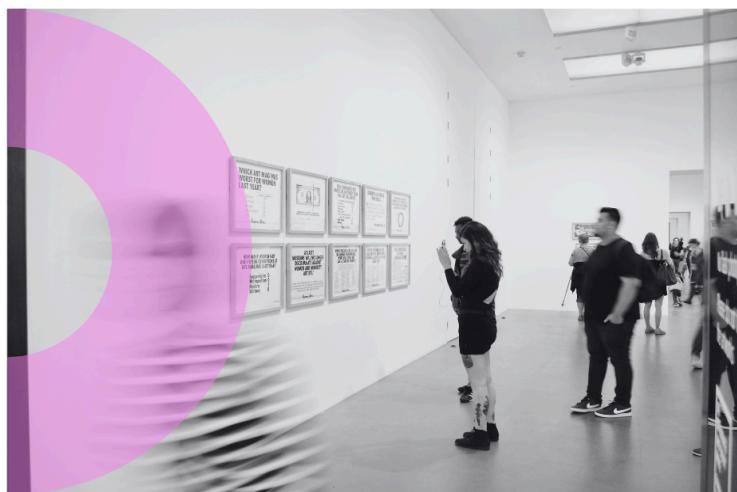
The implementation of these sustainable principles can be found today in collaborative initiatives for decolonization among museums, which may lead to rethinking not only the discourse and design of the exhibitions, but also the accessioning and deaccessioning of objects in the collection.



### **Deaccessioning of material from the Derbyshire and Derby School Library Service**

Buxton Museum undertook an initiative to responsibly transfer art and craftwork from around the world, collected by the Derbyshire and Derby Schools Library Service (SLS), to appropriate communities, museums, galleries, and audiences. They conducted a detailed audit of the materials and made ethical decisions about what would be preserved, transferred, or disposed of. In some cases, items were returned to their original communities.

All details are available at  
[https://www.museumsassociation.org/camp  
aigns/decolonising-museums/case-studies/  
buxton-museum/#](https://www.museumsassociation.org/campaigns/decolonising-museums/case-studies/buxton-museum/#)



◆ © Isaw Company, Unsplash



◆ © Tamal Mukhopadhyay , Unsplash

By decolonizing their collections and practices, museums can play a role in promoting social justice and equity. An overview of the decolonization process in museums involves the following tasks:

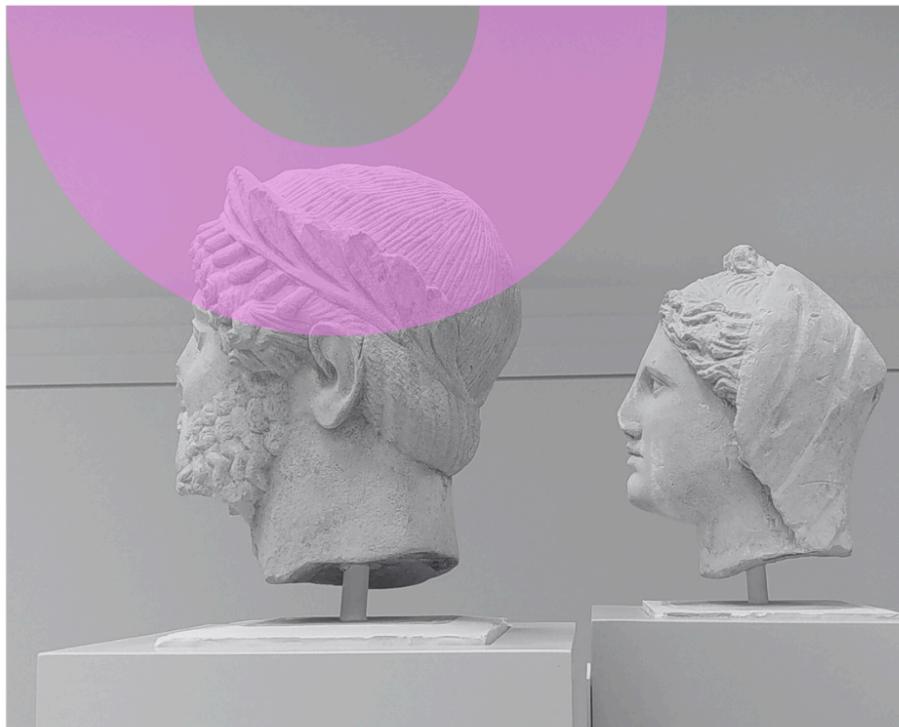
- Critical reflection: The first step is to critically reflect on the museum's history, collections, and practices. This involves examining the museum's role in colonialism, including its collection of looted and stolen artifacts. It also involves examining the ways in which the museum has represented and interpreted different cultures and communities.
- Community engagement: Once the museum has a better understanding of its colonial legacies, it can begin to engage with Indigenous communities and other marginalized groups. This involvement is essential to ensuring that the museum's decolonization efforts are respectful and inclusive.
- Repatriation: In some cases, the museum may need to repatriate artifacts to their rightful owners. This is a complex process that must be done in consultation with Indigenous communities and other stakeholders.
- Reinterpretation: The museum may also need to reinterpret its collections and exhibitions. This involves changing the ways in which the museum presents and interprets different cultures and communities. This may involve including multiple perspectives, challenging stereotypes, and giving voice to marginalized groups.
- Education and training: The museum also needs to educate and train its staff on decolonization. This will ensure that the museum's decolonization efforts are sustained over time.

Finally, some decolonization initiatives can start from communication, to take them into account we can highlight six points to facilitate decolonization practices.

## DECOLONIZING MUSEUM'S COMMUNICATION



All the aforementioned measures can involve and intersect with other CH inclusivity/accessibility categories and communication strategies. Some researchers argue that including oppressed stories has proved to be insufficient and that, by focusing on preserving and newly recognizing CH indigenous narratives in museology, the most we can achieve is political "correction". Therefore, decolonizing curatorial practices should strive for discussing the complexities of historical and community memory in the postcolonial instead of erasing any colonial discourse museums might have historically held. Decolonial communication implies exposing such decolonial past as part of the museum's history and critically addressing these narratives as the main objective of the visitor's journey after the actual visit to the museum).



◆ © Lizeth Salazar, Arte Sostenible

### 3.4 Make it your own!

Now we present some ideas to advance and strengthen collaboration between professionals in your organization. On the next page, you can find a self-reflection box concerning cooperation in management. Using the same format you can add questions and ideas that you consider useful for your specific area. We recommend that you do the exercise individually and then prepare a feedback session with your team to comment.

START	STOP	CHECK		
		We are working on it, we can share our experience	We are working on it	No, we should get to work
We have built a solid network of professionals abroad with whom we maintain communication and collaboration.	<ul style="list-style-type: none"> <li>● Do you have sufficient resources, professional, financial, to carry out concrete actions among professionals to create and maintain partnerships?</li>   <li>● Do we have identified institutions with the same objectives and values to set up partnerships?</li>   <li>● In the last two years we have actively participated as institutions and networking initiatives in the territory?</li> </ul>			
We have a strategy that integrates all areas and levels of the institution to strengthen it according to the strategic objectives.	<ul style="list-style-type: none"> <li>● Do we know what specific goals of the organization can best be addressed through external collaborations?</li>   <li>● Can you develop the different components of the proposal that require technical expertise (such as context analysis, risk management, and ethics)?</li>   <li>● Do we often need to exchange ideas among the professionals of the institution to elaborate and propose cooperation, funding or other ideas?</li> </ul>			
We encourage and facilitate the integration of our staff in dynamics of continuous improvement and collaboration among other professionals and experts	<ul style="list-style-type: none"> <li>● Do we facilitate channels and resources for professionals and staff to strengthen their networks?</li>   <li>● Do we generate internal proposals to offer networks to professionals in related fields?</li>   <li>● Do we combine virtual initiatives with face-to-face exchanges of senior and junior professionals externally and internally?</li> </ul>			



## 4 Communication and Collaboration tools to strengthen the relationship with visitors

### 4.1 Communication map of main audiences in museums and cultural heritage sites

Taking into account a public map allows for the generation of precise objectives and tactics adjusted to the needs of each segment, in order to provide a cultural experience that is emotionally relevant and tailored to their interests.

Here we propose a general map of the public that museums and heritage sites should consider. Distinguishing which can be adjusted to their visitors and which can be added to the general map are two constant tasks for communication and management personnel. Public maps that respond to current and future needs should take into account some of the following tips for effective design:

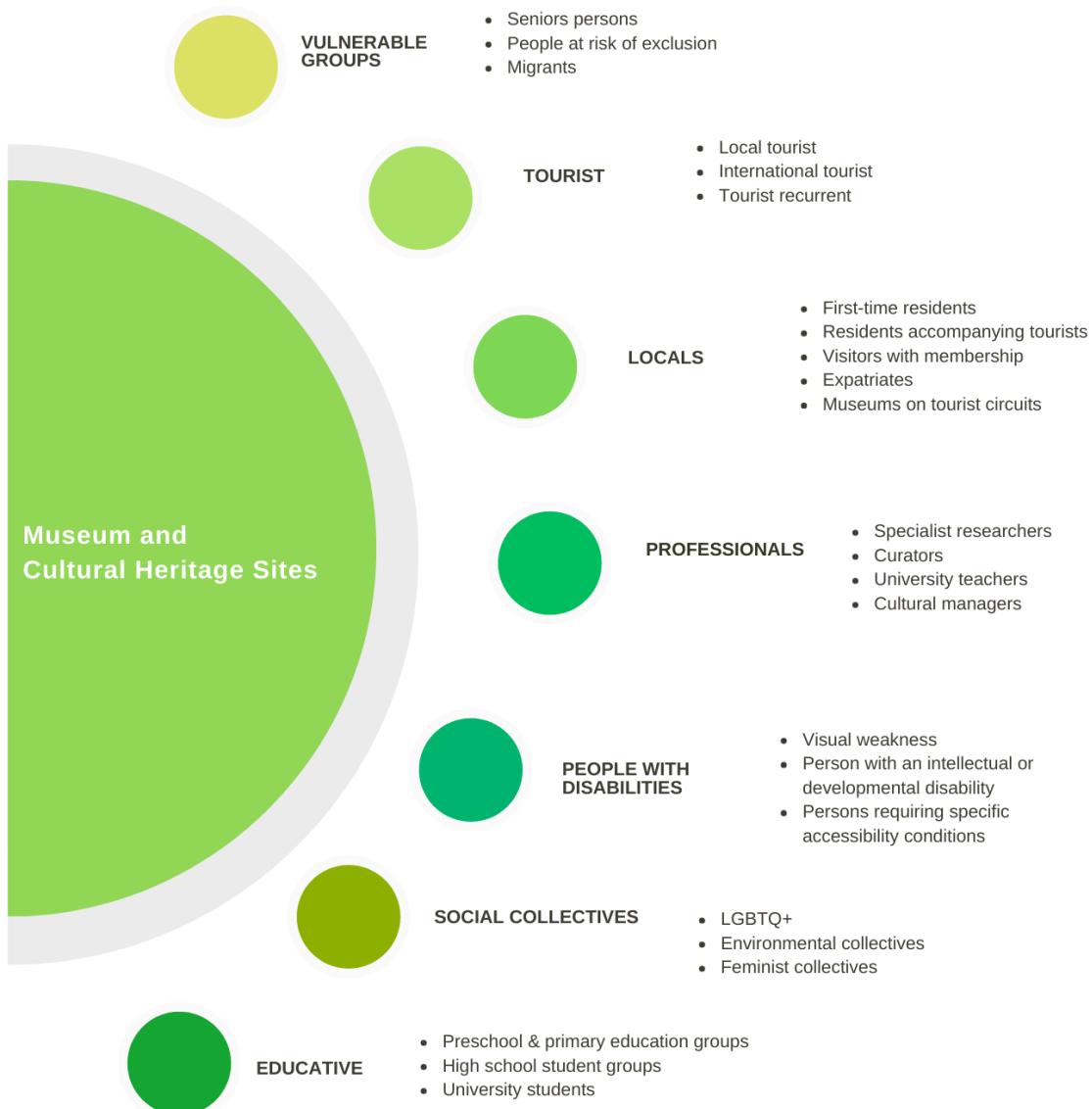
- Distinguish between the audience that already visits and interacts with us and the audience we want to reach: "those we would like to visit us".
- Search for and establish facilitator data sources that are as up-to-date as possible, such as social networks, visitor experience surveys, web experience opinion surveys, and digital communication trend searches.
- Based on the data, propose tactics in terms of experience, exhibitions, activities, themes that could bring us closer to each one.
- Detail, in addition to demographic characteristics, generational tastes, preferences in the consumption of cultural activities and leisure activities.
- Differentiate and detail the target segments and ideal bullet people with as much detail as possible in order to develop experiences and activities in accordance with them.
- Set two specific medium-term communication objectives, as well as the KPIs that will indicate the success or failure of the strategies we will work on for these specific segments.



Remember the difference between the segment or target audience and the persona. While the former refers to a general collective, such as the one shown in the diagram of this section, it refers to broad groups that share characteristics and are relatively easy to differentiate. For example, young teenagers aged 15-18. On the other hand, the persona refers to one or more sets of people from the segment who have preferences that can be synthesized into a hypothetical character, who responds to issues such as: their daily challenges, concerns, worries, their personal and professional situation, etc.

## GLOBAL MAP OF PRIORITY PUBLICS FOR MUSEUMS AND HERITAGE SITES

The definition of an audience map in the museum and heritage site sector must be adaptable and flexible to changes in preferences, ways of consuming activities, ways of creating and learning for each of the different audiences. Beyond the demographic and socioeconomic profiles of the audiences. Preferences in specific topics of virtual communities and urban tribes can enrich the map, create community and foster empathy.



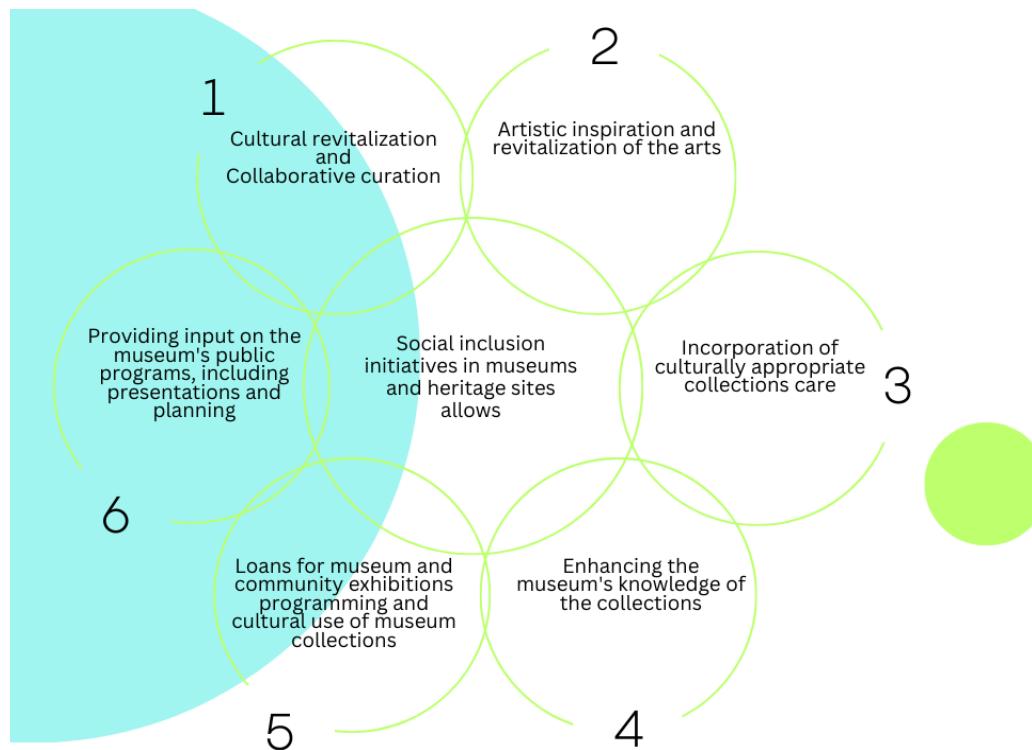
## 4.2 Recommendations for sustainable communication between museums, heritage sites and visitors

By Lorena González and Lizeth Salazar

Museums and heritage sites are committed to being safe, open and accessible spaces for all people. In particular, to be spaces of creation, reflection and knowledge for groups that need representation. The museum for all is an approach that requires clear implementations with a short, medium and long term commitment to communities and collectives as well as a social vocation that seeks to have an impact on the local community in which it is located.

### 4.2.1 Social inclusion, communities and diversity

In the current context, museums have the imperative to know how to move and grow as an open space, whether for different identities, local communities or LGBT+ collectives. The first step to address the inclusion is knowing their complexity, and ethical, political and cultural transversality. So some initiatives that can facilitate the opening of the museum have to do with the inclusion in the participatory processes of museums and with the elimination of multiple barriers with groups underrepresented in the community or at risk of social exclusion. Designing and implementing social inclusion initiatives in museums and heritage sites allows articulating and nurturing various initiatives, for example:



Each result of the inclusion actions allows the museum and the heritage site to actively develop their social role in their territory and their diffusion role in the global context. Among these groups are: migrants or refugees, local communities or communities of an ethnic group or culture representative of the territory, people who identify with the LGBT+ community, people at risk of social exclusion, emerging artists with disadvantaged means, children at risk of exclusion, etc. It is important to distinguish which groups are close to the museums or heritage sites to address their problems from a perspective that considers concepts such as intersectionality, which refers to the connection between social categories such as ethnicity, geographic location, gender, age and social origin. These conditions overlap and generate inequality.

Beyond the positive effects it can have for the institution, we can distinguish some positive effects that extend outside the museum or heritage site, for example:

- Promotion of efficient services in the amortization zone.
- Fostering economic growth, demographic change and environmental responsibility in the local community.
- Encourage active citizenship.
- Positively changing preconceived ideas and stereotypes about communities or practices.

To understand social inclusion in simple terms is to ensure that museums and heritage sites belong to everyone and are for everyone. Social inclusion can be present in the organization of collections and exhibitions, in activities specifically designed for underrepresented groups, and in the communication channels of museums and heritage sites. However, in order to generate inclusion, it is necessary for the team to take into account some of the following aspects:

## SOME STEPS TO GENERATE AN INCLUSIVE PROCESS

Identify the main problems and discourses that can be addressed from the discursive and practical point of view of the museum or heritage site.

Design a plan for approaching the communities in case there is an opportunity to visit them outside the institution or the protected area.

Encourage dialogue tables, discussions and activities for visitors to maintain a dialogue with sensitive topics during the exhibitions.

01

Preliminary diagnosis of groups that may be at risk of exclusion within the local areas of the museum or heritage site.

02

Design a collaborative action plan that includes representatives and members of underrepresented groups so that they can participate in specific actions where they are empowered and represented in a conscious way.

03

Planning an appropriate strategy for the dissemination and diffusion of knowledge built for and by groups underrepresented in the various audiences of the museum or world heritage site.

04

Apply an evaluation system to know the effects and impact of the actions with each group.

05

06

In the specific case of local communities that represent a cultural or ethnic group, it is important to have precise knowledge of the particular context of the group and knowledge of its uses and customs. It is also essential to consider how the institution can have a real commitment to include the community. In this sense, considering the help of a cultural mediator or a cultural consultant can be of great help as a facilitator.

We mostly talk about indigenous communities when we talk about community inclusion processes, however there is a wide cultural, social and religious diversity depending on the location and history of each region. In any case, dialogue and inclusion must be applied since the scope of the museum must expand.

When we talk about local communities, we could be referring to minorities or ethnic or religious groups that have practices or manifestations in the nearby territory or in the case of heritage cities or heritage areas to the amortization zones. In any case, its identity and dignity must be taken into account as a unique body of knowledge with which the museum discourse can be enriched. Therefore, generating rapprochement with groups, whether inviting them to visit the collection or going to their communities, can be a long-term strengthening factor for museums and communities.



Integrating perspectives from decolonization or intersectionality may contribute to the review .

Both concepts should be taken into account not only from their definition but also from their complexity and application to the different countries of the world.

In the specific case of heritage sites or site museums, any initiative taken to improve the dialogue and representation of these groups in the discursive treatment of exhibits, routes or presentation of community-owned or community-related assets or properties must be carefully open to dialogue with representatives of the communities concerned. Some easy-to-implement measures for this purpose may be:

- Develop an internal guide to ensure knowledge of procedures to include communities in various inclusive procedures.
- Distinguish and facilitate, if there are rituals or practices in which the communities require the heritage space or elements that are part of the collection. Through a respectful protocol for both parties.

- Share information about the community and its relationship to the objects or properties that make up the exhibits.
- Where appropriate, provide information on the pieces, archives, exhibition or tour in the vehicular languages of the community in order to.
- Investigate if there are artists in the community who use related themes to provide space for them.
- Guarantee access to heritage sites and objects that are closely related to the communities' religious ritual practices.
- Build and maintain open channels of dialogue with the museum or institution through a professional liaison between the institution and the community.
- Adequate training for mediators and educators responsible for the tours, with an approach that includes a decolonial and inclusive perspective with the collectives as appropriate.
- Integrating a critical and self-reflexive vision in the presentation of pieces and interpretation centers.
- Critical and adapted review of materials that inform and communicate within the museography and exhibition. Recognizing historical, ethnic, social, or any other omissions that may exist.

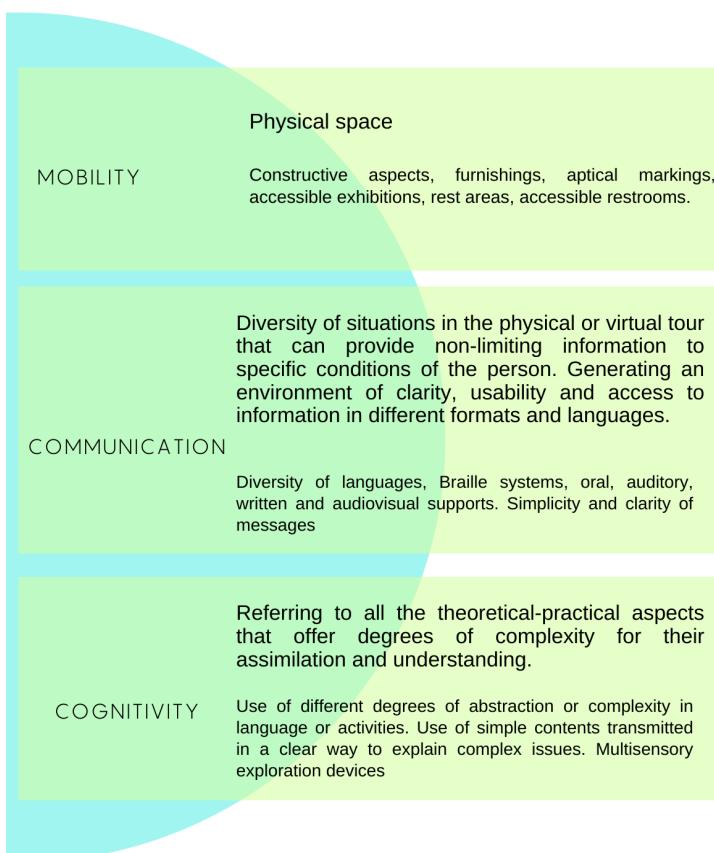


#### 4.2.2 Accessibility

Accessibility refers to providing equal access to all people, regardless of their physical, cognitive, or experiential ability, and also refers to the process by which organizations enable multiple audiences to make sense of culture in different ways. Thus, although accessibility is one of the means for the inclusion of audiences that have not always been taken into account within the museum - from visually impaired people to neurodivergent visitors - we must also be aware that inclusivity does not always mean accessibility.

Accessibility is a topic that has occupied multiple experts in the area as it is a term that has multiple areas of application, authors like Majewski help us to understand it in physical and narrative layers. Or the DALCO<sup>12</sup> criteria (De-furnishing, Apprehension, Localization and Communication) proposed by the Spanish Standardization Agency in 2007 and that can be applied to evaluate and strengthen accessibility in three areas: Mobility, Communication and Cognition.

#### ACCESSIBILITY AREAS



<sup>12</sup>[https://www.turisme.gva.es/turisme/es/files/pdf/Guide\\_adapting\\_jobs\\_labour\\_insertion\\_people\\_with\\_disabilities\\_tourism\\_sector.pdf](https://www.turisme.gva.es/turisme/es/files/pdf/Guide_adapting_jobs_labour_insertion_people_with_disabilities_tourism_sector.pdf)

In the case of web accessibility, it is important to apply the accessibility guidelines that are established by the European regulatory frameworks, whether they are general or those that respond to the regulatory framework of each of the member states. In addition to this, communicating clearly the actions and policies of accessibility in the digital channels must be at hand for any user. The principles established by the Web Content Accessibility Guidelines developed by the World Wide Web Consortium (W3C) are very useful when applying their criteria of:

- Perceivable: the content must be available for at least one of the user's senses. For example, images are described with alternative text for users with visual disabilities.
- Operable: the content can be controlled by different instruments. For example, using only the keyboard for people who cannot use the mouse.
- Understandable: the language used is clear and simple, and the interfaces are predictable and consistent. This helps people with cognitive or reading disabilities.
- Robust: the website or application must work well with different platforms, browsers and devices, including assistive technologies.

The implementation of all measures is a medium-term goal for museum organizations and heritage sites; however, each one makes the adaptations it deems appropriate according to its particular situation while maintaining a required minimum. In this case, it is important to make a self-examination of the points of contact along the physical and virtual tours in order to know the situations that are not taken into account and to optimize the use of these points of contact.



At the Pedrera Museum, Casa Milà (Barcelona, Spain), in response to the needs of people with visual impairment, a tactile model has been installed that allows them to explore the architecture of the building considered a UNESCO World Heritage Site. This example, in addition to enhancing the experience by being a 3D structure, has an explanatory sign in Braille and is located in a place accessible to everyone on the tour.

In the case of tactile models some recommendations are:

- Have dimensions between 50cm x135cm.
- Place it on a flat surface without inclination.
- No uncomfortable or sharp edges or angles.
- Use durable and easy to clean materials.
- Place an explanatory box or with additional information.
- Accompany it with drawings or additional haptic material.

The issue of accessibility has vital importance for museums, heritage sites such as archaeological sites, heritage cities and their buffer zones, natural areas or natural parks open to the public. Therefore, the review of contact points can be applied to urban, rural or natural routes in the case of cultural tourism. In this sense, the most advisable thing is the development of joint programs to facilitate accessibility inside the premises and on the way to them. For example, through accessibility maps of the tourist areas or areas near the museums or heritage sites.

In addition to the traditional tours, the realization of activities is one of the aspects that deserve special consideration. The design of suitable activities according to the functional conditions of each visitor helps to create a sense of empowerment and creativity on the part of the participant. With creative empowerment as a goal: activity, space, resources, theme and mediator or educator have to be in tune with emotional proximity, security and freedom.

In the specific aspect of activity design, the complexity is greater since psychosocial and medical aspects must be taken into account for its design. Some factors may be: greater or lesser resistance to stress; difficulty in personal relationships; lower level of personal and social autonomy; greater dependence on third parties or specialized services and difficulty in developing social roles normalized and valued by the community to which they belong.

Taking into account the psychosocial factors to carry out accessible activities, the central objectives must be formulated on the basis of the positive aspects that we would like to achieve: contribute to their personal and social autonomy and strengthening of self-esteem.



The accessibility of museums and world heritage sites is complex and requires adaptations at various levels, so it is essential to consult resources dedicated entirely to addressing specific adaptations such as these two manuals for addressing accessibility in museums created by NEMO and the Space of the Ibero-American museums:

Available:

[https://www.ne-mo.org/fileadmin/Daten/public/topics/Museums\\_as\\_Social\\_Agents/Toolkit\\_for\\_Museums\\_working\\_towards\\_Inclusion.pdf](https://www.ne-mo.org/fileadmin/Daten/public/topics/Museums_as_Social_Agents/Toolkit_for_Museums_working_towards_Inclusion.pdf)

<http://www.ibermuseos.org/wp-content/uploads/2020/05/2019-zuniga-manual-de-accesibilidad-para-museos-per.pdf>

Let's remember that accessibility is a cross-cutting commitment to all institutions and organizations with a social vocation. Forming programs and teams that address these needs also includes having active listening with the users of these implementations. And finally, it is essential that once these implementations are covered and developed, they are communicated to the audiences that require them. Some specific strategies applied to heritage sites and museums and heritage sites could be those numbered in the following figure:

#### 4.2.3 Environmental awareness

Disseminating the museum's and cultural heritage sites environmental awareness refers to communicating the institution's environmental warnwess and its compromise of minimizing all ecological impact. It can imply a Protocol or a Declaration, and it involves implementing practices that prioritize reducing carbon emissions, fostering sustainable operations, and integrating environmental awareness within their management.

Environmental commitment within the framework of museums and heritage sites is one of the key issues in which to invest effort both within the institution and in the search for governmental, territorial, and social initiatives. All derived from understanding and assuming that heritage in any of its expressions has a component of fragility derived from the impact of climate change and that it is vital to repair and prevent its deterioration for its conservation for future generations

As mentioned by the European Commission in the Framework for Action on Cultural Heritage<sup>13</sup>, there are three main pillars for advancing environmental sustainability: Three clusters of actions are included in the Framework to:

1. Regenerate cities and regions through cultural heritage
2. Promote adaptive re-use of heritage buildings
3. Balance access to cultural heritage with sustainable cultural tourism and natural heritage.



Environmental responsibility requires a comprehensive and detailed view of the effects of climate change and green measures in all sectors can be beneficial to the environmental vision of the museum or heritage site. Actions such as environmentally friendly measures for the rehabilitation of monuments, development of green technologies and materials for restoration or the design of environmental education programs to inform about the value of natural heritage in a specific area are tactics that can be implemented on a day-to-day basis.

<sup>13</sup> <https://op.europa.eu/en/publication-detail/-/publication/5a9c3144-80f1-11e9-9f05-01aa75ed71a1>

Some actions that can be taken to achieve the development of the above pillars are as follows, clearly reporting and communicating the environmental danger of heritage sites through protocols and official statements is a measure that can help to give strength and

formality to the scientific message. At the same time, actions with visitors such as discussion-oriented programming and scientific outreach can enhance communication of environmental commitment.

## ACCESSIBILITY STRATEGIES APPLIED TO MUSEUMS AND HERITAGE SITES

Developing and disseminating the existence of spaces for sensory-sensitive audiences with designated quiet areas, offering noise-cancelling headphones that provide a safe space throughout the visit by adjusting lighting and sound levels along exhibitions which might be important for neurodivergent audiences.

Creating social stories and character-lead narratives that communicate content information in a playful way while setting up a non-hegemonic role model that audiences and visitors normalize throughout the visit.

01

Creating multi-sensory communicative experiences for visitors with sensory or sensorimotor intelligence. This involves designing exhibitions conveying a narrative by appealing to a wide range of senses at the same time which can include tactile experiences, audio guides, and interactive exhibits and disseminate them.

02

Creating social stories within communication media/channels that explain what visitors can expect when they visit the museum. Social stories can help visitors with cognitive disabilities as well as neurodivergent audiences to prepare for their visit and reduce anxiety while providing them with directions for a satisfactory visitor's journey.

03

Communicating the existence of different services, from breastfeeding rooms or spaces for childcare to seating areas and renting services including wheelchairs, strollers for infants or adapted tours on-site throughout the visit.

04

05

In the medium term, some additional actions could be:

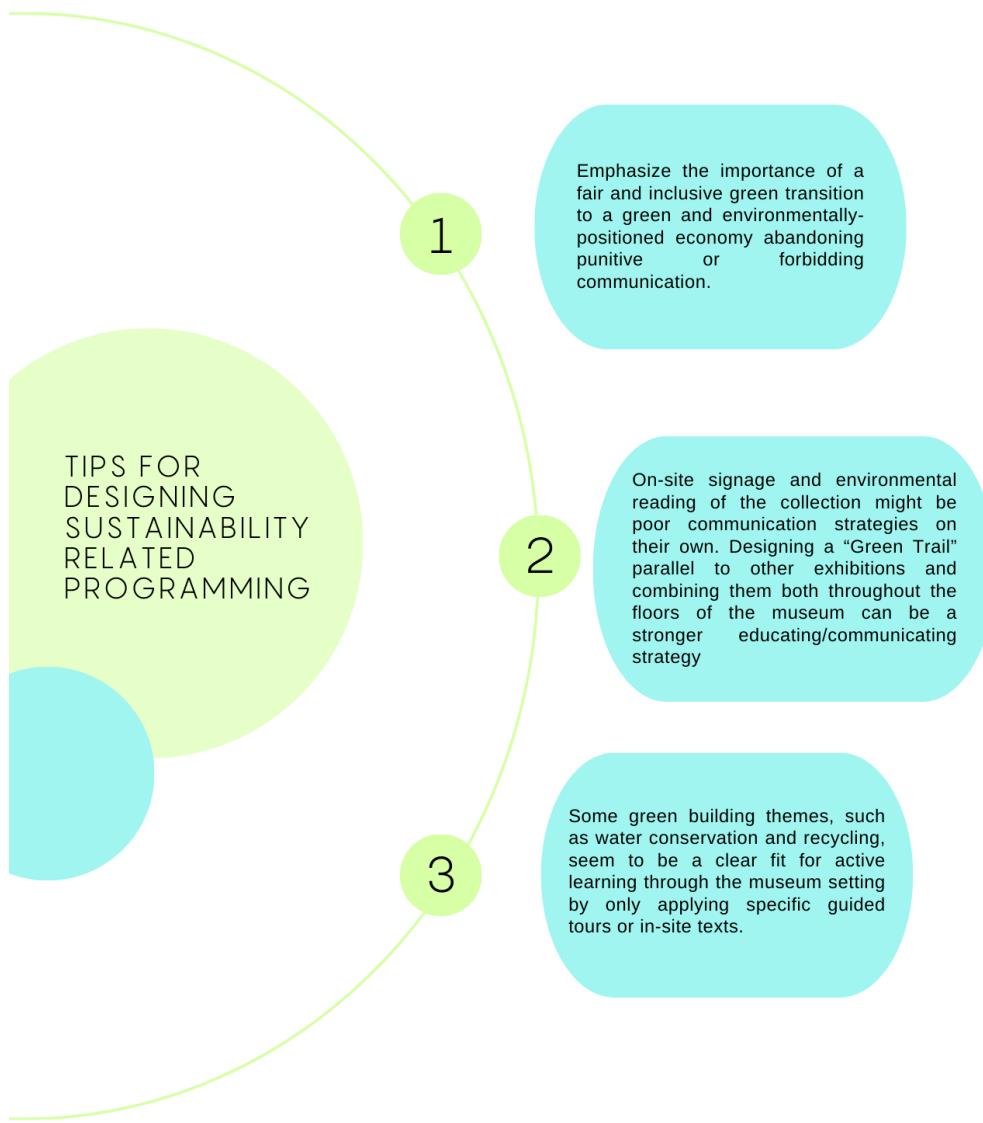
- Setting up ties and becoming a team player within networks of individuals, communities and cultural organizations with an environmental agenda aligned to your institution's Green Commitment.
- Developing an action plan to address sustainability within the museum at different levels (management, communication, programming, etc.) and open this information to audience participation (e.g. through a feedback mailbox)
- Review and renew your Action Plan regularly.
- Regularly assess how your institution aligns with such Green Commitment/Action Plan and be honest about the limits and stances of such positioning (e.g. green commitment of donors and sponsors, sustainable building infrastructure).
- Museums' societal role has shifted from exclusively conservation sites to having a community focus working towards the common good development including local environments and ecosystems.
- Feigned neutrality in connection to environmental discussions on behalf of political correctness goes against this principle.
- Museums should consciously tackle up-to-date Green Commitment-related research, such as discussions on the Anthropocene and current climate emergency data.
- Overcoming narrow disciplinary perspectives can be achieved by establishing well-defined Guidelines for Environmental Communication within the museum.
- Accounting for the regional context -i.e., local environment specifics, and particular ecosystems-can ease how audiences engage with situated environmental discourses.
- Regularly evaluate how environmental awareness narratives are perceived and which are the specifics of each target audience communication to improve the museum's strategies and media in use.



Forming a climate action plan is one of the key steps in achieving the goals of a museum or heritage site's environmental commitment, and designing a plan tailored to the needs and capabilities of our institution is a challenge for which we need all the help we can get. The Mobilising Museums for Climate Action (London 2022) toolkit outlines five main approaches for museums to contribute to climate action. This resource is freely available at the link:

<https://www.museumsforclimateaction.org/>

It is important to mention that in order to correctly apply the above tips it is essential to develop a sustainability program. Here are some tips for designing programs related to sustainability, some ideas to develop them are:



Based on the European Cultural Heritage Summit Prague based on 2022 European Summit, raising awareness and educating about the importance of working towards the Sustainable Development Goals is a useful measure to strengthen the objectives of sustainability and environmental commitment in museums, heritage sites, heritage cities or cultural tourism destinations as explained in the following figure.

Environmental commitment is an issue that will mark the future in the strategic development of museums and heritage sites. Establishing programs and measures is essential, as is the establishment and monitoring of indicators that facilitate quantifying the programs, initiatives, and measures taken. Distinguishing environmental problems promptly helps to plan a solution and reduce the long-term negative impact.

## WORKING TOWARDS THE SUSTAINABLE DEVELOPMENT GOALS

(European Cultural Heritage Summit Prague, 2022; Goodwin, 2014; McGhie, 2019)

Providing information on SDG as a part of any Human Rights working framework.

Providing public access to resources connected to SDG.

Communicating up-to-date information linked to the SDG.

Providing information on how people can address the SDGs in their daily life.

Programming involving the SDG and fostering SDG-related research

Programming to raise awareness of sustainable development connected to contemporary cultural, technological, economic and scientific social issues.

## 4.3 Branding, Digital Social Media and ITC tools to communicate with visitors to museums and heritage sites

### 4.3.1 Branding to connect with visitors in museums

By Lizeth Salazar

Branding, understood as brand management, is applied across all sectors, goods, or services. It is crucial to use a structured set of attributes that identify a product, institution, organization, or otherwise, helping to differentiate it from others and making it memorable to various audiences.

Brand management extends beyond a logo or graphic style. While graphic elements are necessary, branding involves the accurate communication of attributes and values that enhance the presence of a museum or cultural sector institution within its territory and its target audience. Brand management is a cross-sectional task within the entity.

In the cultural sector, branding has a broad spectrum as the nature of various types of museums, cultural facilities, and heritage sites offer a wealth of symbolic capital to communicate their social and cultural significance within a territory. Therefore, it is important to manage, nurture, and strengthen each institution's brand through the communication department responsible for each museum or heritage site.

Above all, a brand is a communication tool to connect with the public and its environment, synthesizing all attributes. In the case of a museum, the brand can be a symbol of prestige and transform the institution into a cultural ambassador of the territory in which it is located. This is one of the most important roles of the brand in cultural institutions, whether they are art museums, science museums, house museums, or any other cultural sector venue.



There are brands that can be associated with the brand of the museum institution or heritage site, as insignia, brands such as belonging to the UNESCO heritage list can add to the prestige and visibility at the tourist level of the entity, without forgetting that making use of them means respecting and following the values of these seals and translating what they represent into practices and actions.

To understand the communicative importance of the brand, deferents authors like P. Captrotti explain that the brand can be considered a symbolic substitute for the entity and inherently linked with the audiences:

For an entity: the brand functions as a communicative synthesis, as it cannot transmit all its complexity. It is a significant selection of its particular, relevant, and distinctive characteristics. In this way, the brand facilitates a focus on the communicative effort of an entity.

For the audiences or visitors: the brand acts as a cognitive and evaluative synthesis of an entity because they cannot process all the information about its multiplicity and complexity. What the audiences know, evaluate, and remember is a significant synthesis (for them) of an entity, which is the result of receiving and interpreting all the information about the key and distinctive characteristics of it. Therefore, the brand allows them a cognitive effort economy.

Once we have reflected on the importance of the brand in the museum entity as well as in the audiences, it is essential to establish some key lines to achieve continuous strengthening of the museum brand or the world heritage site brand:

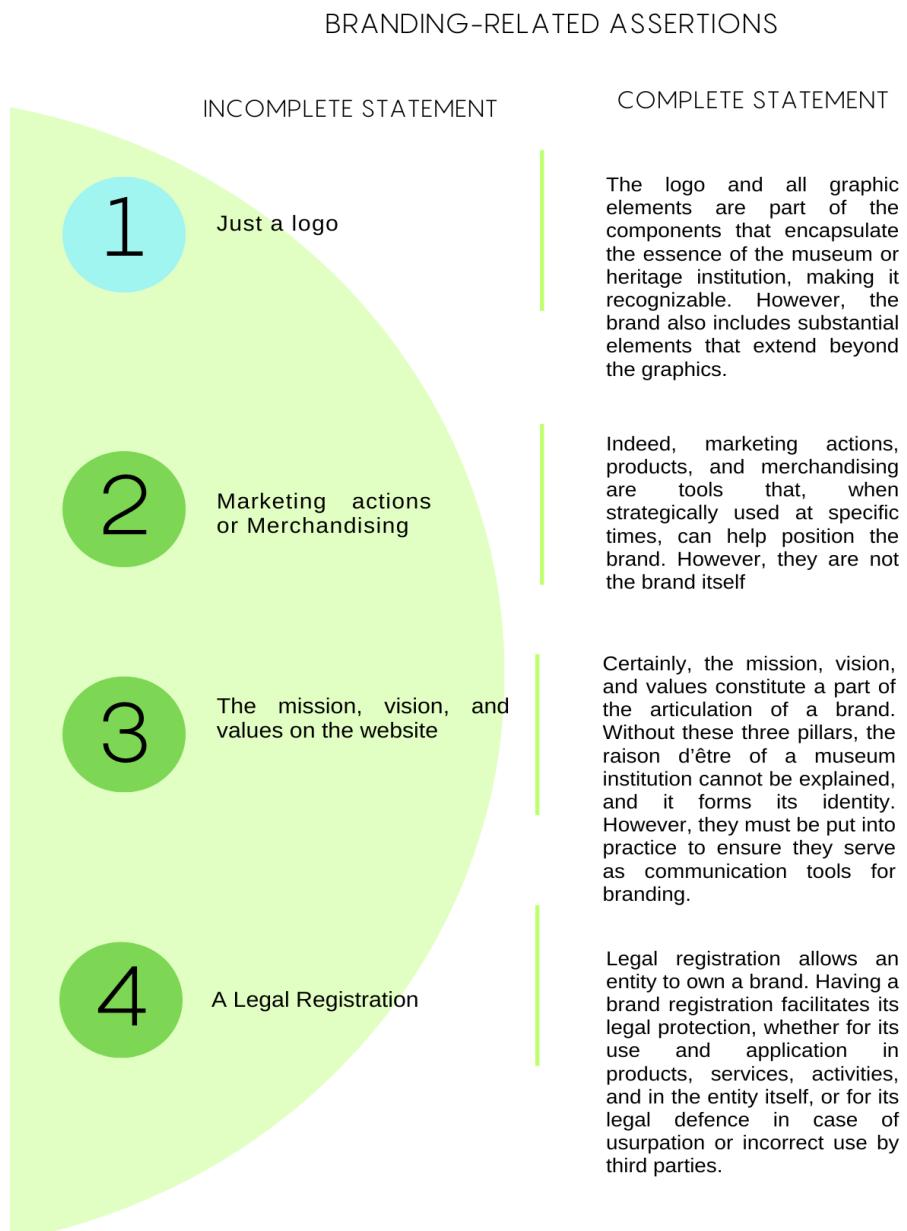
- All actions and communications of the museum entity must be linked to the brand's values and principles.
- It must be integrated as a mission into the communication management department, where they have the responsibility of being the guardians of the institution's brand.
- It is essential to reflect on the relational, commercial, and social value that can be achieved through brand management.
- Efforts should be concentrated on maintaining the current differentiating elements that the entity offers to its audiences, including tangible and intangible factors.

In the cultural field, it is suggested to seek closeness with the public, away from the meanings of this contributes to closing the gap that may exist with visitors and in which the correct brand management can contribute positively. Therefore, it is advisable to:

- Continuously review the current relevance of the Brand Identity (graphic elements).
- Periodically analyse the current and temporal coherence of the values that are sustained, seeking to respond to contemporary social and cultural needs in terms of sustainability, accessibility, and tolerance.
- Constantly analyse the way in which collaborators are stimulated to be brand ambassadors. Periodically examine whether the brand is adequately communicated and corresponds to the strategic objectives in priority audiences.

- Monitor the way in which the values and mission of the entity translate into actions with the community and the territory in which they are located.

Finally, it is important to remember some important issues to make a summarized differentiation of some ideas that can help strengthen the branding of the cultural entity:



### 4.3.2 Digital social media platforms their role in the visitor's journey

By Lizeth Salazar

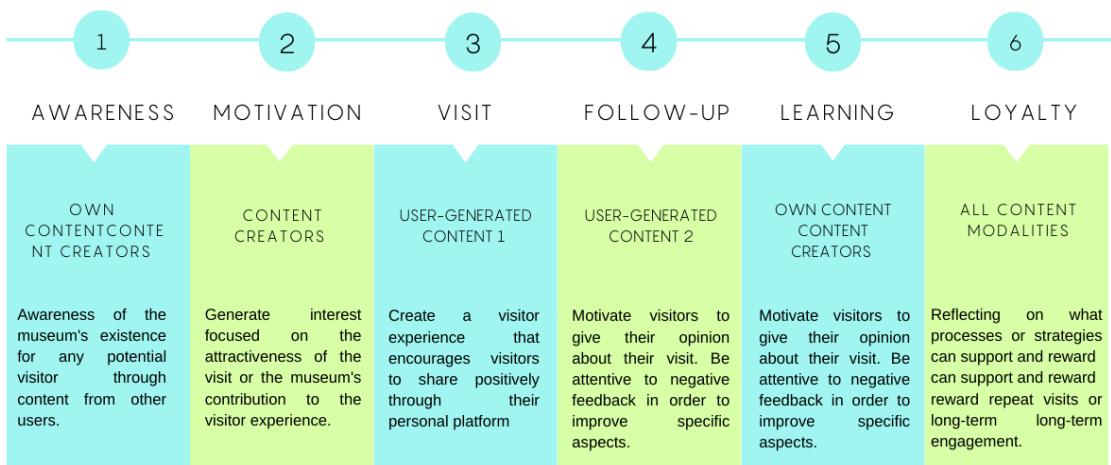
Social networks are tools for strengthening key messages and specific knowledge of museums and heritage sites, beyond being a bulletin board for the institution. Social networks have increased their functions for different segments of potential visitors, largely due to technological and global phenomena that impact all sectors, including the cultural and museum sector. In this sense, the cultural experience is transformed and diversified for each segment of the public.

Social networks allow for the dissemination of knowledge and serve as a window for promoting the activities offered by the museum or heritage site, with greater impact on audiences with motivations and interests related to culture, art, and heritage. Their influence before, during, and after the visit broadens the range of possibilities for content creation and highlights their importance in the visitor's journey. Social networks are an important touchpoint, whether it is a first-time visit or a recurring visit, as can be seen in the following figure:

## SOCIAL MEDIA IN THE VISITOR'S JOURNEY

How social networks are present for museum or heritage site visitors

### JOURNEY



Touchpoints: social media, web, metasearch engine reviews, opinions on online travel agencies.

In addition to identifying the potential functions of social networks in the visitor's journey, as seen in the previous figure, it is essential to point out four challenges to be faced in the use of social networks to strengthen communication in museums and heritage sites in order to improve the experience of visitors and potential visitors:

1. Establishment of differentiated objectives (mainly communication and commercial objectives): Marketing and communication objectives can be supplemented with education, branding and reputation, sustainability, or interaction with the local population, digital visitors, among others. To have a guide on how to achieve these types of objectives, the following questions are useful:

- What do we want to achieve?
- In what time period do we want to do it?
- What is the ultimate goal?
- With which tools?
- Why do we want to achieve it?
- How will the budget be distributed according to actions and campaigns?

It should be noted that it is important for each SMART (specific, measurable, achievable, realistic, and time-bound) objective to have KPIs that respond to the data tools available on each social network. In the specific case of museums and heritage sites, objectives can consider two relevant factors:

- Integrators. Share characteristics of heritage that are similar to those of others, to create a link between the past and the future through the present.
  - Representativeness. Based on the details that make the manifestation of material and intangible heritage of the territory exclusive and exceptional. (UNESCO, 2002)
2. Adaptation of content according to follower trends and changes in the platform's algorithm to give visibility to different content. It should be remembered that constant changes in the functioning of algorithms can affect the way we generate and publish content, therefore, being aware of these changes can benefit the visibility and interaction of content generated by the institution in the long term. Another basic tip related to content is to maintain quality and variety of content, two essential components that, combined with the correct use of creative tools and key publishing times, can contribute to efficient communication on social networks. As well as designing a consistent brand image on social networks with the museum or heritage site.

3. Formation of social media manager teams with technical profiles adapted to current needs in content generation, results analysis, and in the specific case of the sector we are dealing with; having professionals with training related to the category to which the museum or heritage site belongs. In short, professionals passionate about trends on social networks with motivation for constant digital literacy and knowledge in the museum sector. Some competencies that may be useful for strengthening a social media team in museums may be those shown in the following figure:



4. Development of active listening to interact with followers (response to comments) and to maintain a constant review of post-visit comments on traveler platforms and social networks. Periodically reviewing global comments on platforms can enrich and favor decision-making, as well as keeping track of topics and areas where users place greater emphasis in their comments after the visit.

Considering the visitor's voice can also be applied to observing creative themes and trending themes or ways in which other museums or institutions are doing it to constantly learn. Experience tells us that social networks are relevant for the museum or heritage site institution, as they can be nodes that retain users' attention. The success of content and campaigns in different sectors is not measured by the number of publications made, but by publications that are capable of retaining the user's attention long enough to communicate the desired message, an example of this is short video content that measures its success if it can retain attention in the first three seconds of playback.



The Prado Museum (Madrid, Spain) is an example in terms of content creation, respect for the museum's objectives, use of social networks to socialize the knowledge of its specialists such as curators or restorers, and value proposition of content by showing the curiosities of its works in accessible language. Its Instagram and TikTok accounts are aimed at a general audience and have 499k followers on TikTok and 1 million on Instagram as of June 2023. Its keys: Consistency, quality of content, naturalness in language, and speed of adaptation to new social media platforms.



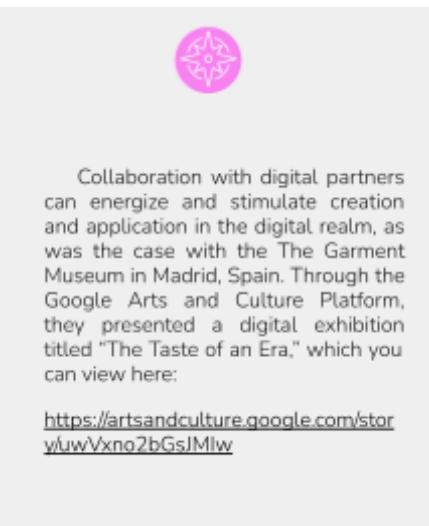
### 4.3.3 Online visits on extended platforms

By Lizeth Salazar

The cultural experience has diversified with the incorporation of the digital dimension into the visitor experience in museums and heritage sites. Of the wide range of digital options, we can classify them into two large groups: those that enrich the physical visit and can only be used throughout a tour (*insitu*) and those that facilitate the digital experience, contact only through digital channels with the potential visitor or exclusively digital visitor (*exsitu*). Each one must be designed depending on the need and complementarity it covers in the visitor's journey and adapted to the institution's digital strategy.

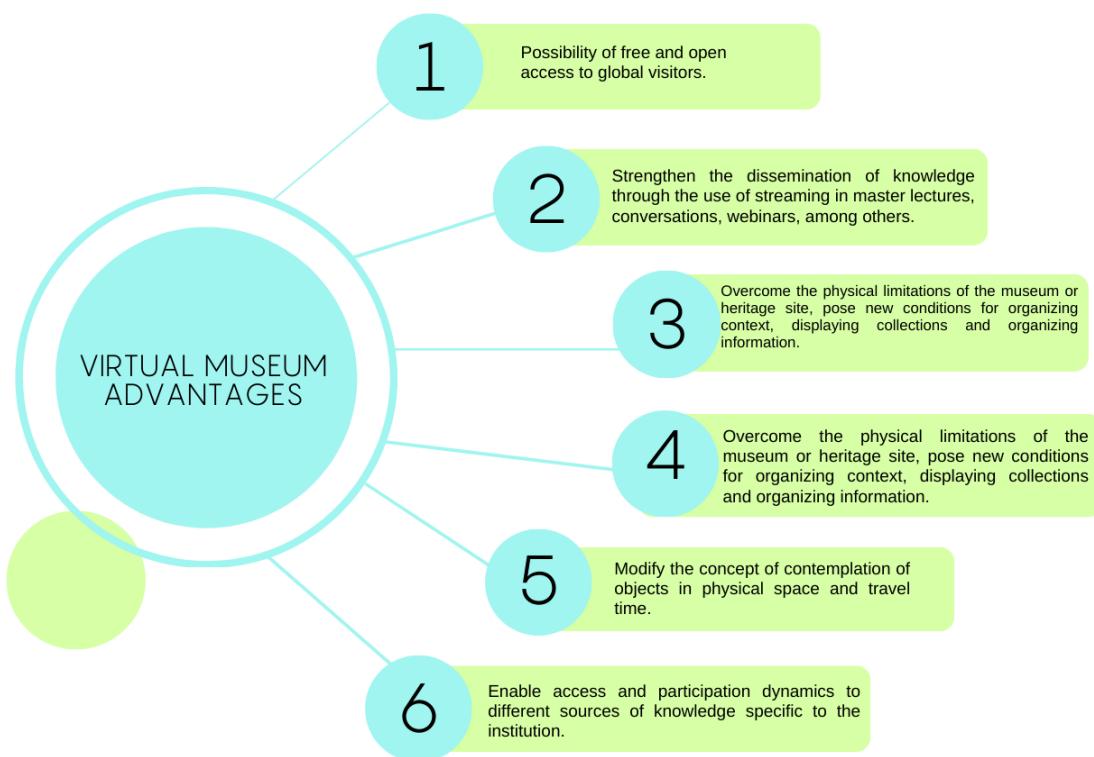
As for the experience of the digital visitor, it is mainly focused on two platforms, social networks as a great showcase of what the museum is and on the official website of the cultural institution. Its importance lies mainly in the fact that the digital visitor is a visitor with different motivations that motivates this person to search and invest their attention in the search, that is to say: it is the potential visitor who comes to us. Therefore, the time invested in their journey within the web architecture is a central point to take into account in the development and strengthening of the resources available in the digital visit. Digital sources can find four main communication efforts targeting their different audiences according to their motivation to interact digitally:

- They seek information for their physical visit.
- Seeking to plan their visit and purchase tickets.
- Seeking to consult specific archives or catalogs.
- Seeking a virtual visit.



◆ ©Tobias Cy, Unsplash

In this sense, online platforms are more than just a double of the museum, they are an enriched node, a sounding board for what the physical museum is. The digital content and architecture can be the differentiating factor of the museum, a complement to enrich knowledge or a motivator to make a physical visit to the museum or heritage site. The virtual content and offer must have clear objectives in order to be valuable content. Without being a substitute for the physical visit, the virtual museum has advantages, some of which are:



The digital visit, which we can call the extended museum, transforms the physical limits of the museum or heritage site and encompasses official websites, digital exhibitions, online catalogues and all actions that create an enriched layer of knowledge of the museum on digital media. Although the appearance of the digital museum dates back more than a decade, the current challenge is to question as an institution the processes to improve and transform the digital visit into a meaningful and attractive visit.



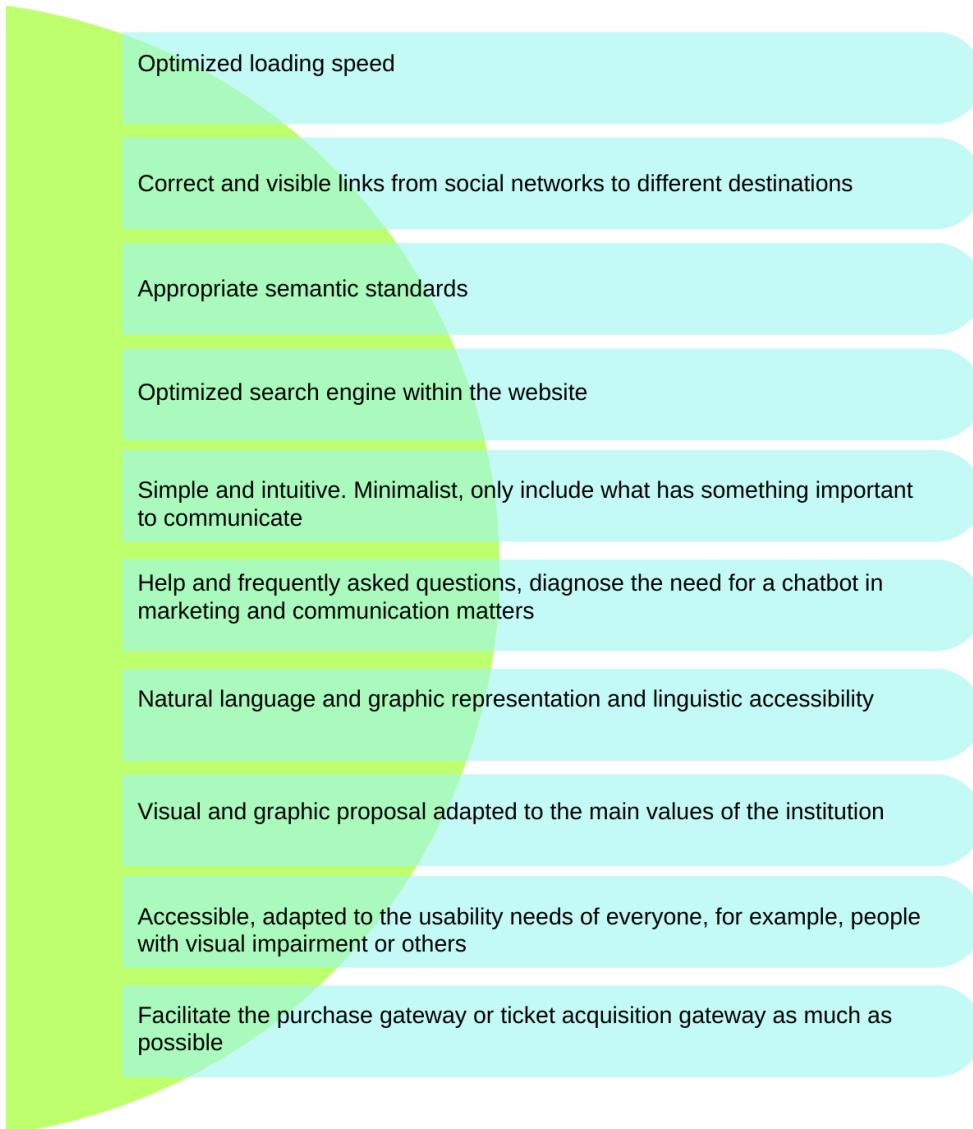
◆ © Giu Vicente, Unsplash

One alternative to strengthen the digital visit is to apply transmedia narratives, this concept can be very useful for tracing and addressing the strategies of the visitor's digital experience as a connected whole. Transmedia narratives refer to the construction of interconnected worlds on different platforms with certain independence to function separately. Applying transmedia narrative to the digital experience of museums can help link users with different devices and formats to a more meaningful experience. Giving the digital experience a transmedia approach tries to maintain a relationship of content between various platforms and dynamics with the visitor.



As part of the project to offer a digital experience, it is possible to appreciate a digital exhibition dedicated to three themes: conflicts, identities, and crafts. This exhibition, in addition to offering essential information on various pieces, includes a 3D view and high-definition photographs to appreciate the detail of each one. You can find more information here: <https://collection.reinherit-hub.eu/>

## COMMUNICATION FACILITATORS IN THE DIGITAL VISIT



In addition to integrating transmedia into the museum's digital strategy, it is important to establish and research a list of indicators to evaluate the efficiency and reach of activities in the digital experience. This includes adapting data analysis methodology, web analytics and mobile analytics to verify the success or failure of digital activities. Analytics can yield findings from studies of digital users and evaluation can focus on different objectives, such as knowing the profile of users, personalizing the experience, optimizing the offer of digital products and services, increasing revenue, measuring the result of marketing campaigns or showing the impact of these activities, among others.

Once the analytics have been processed, there are several practical formats that can be integrated into the digital experience of a museum or heritage site:

- Brief audio or audiobooks.
- 360° or 3D videos.
- A blog optimized in different languages with experiences and knowledge.
- An attractive and easy-to-use cataloguing system.
- Short games or multi-device dynamics (gamification).
- Dynamic timelines.
- Joint digital exhibitions with other institutions or technological partners (e.g., Google Arts and Culture).
- Online collections with ultra-high definition images.
- Downloadable original content.
- Themed online tours.
- Digital catalogues or digital albums with technical sheets and descriptions.
- Notable monographic content.
- Explore e-content generation formats such as podcasts or short videos.



An interactive format that can meet the interests of both visitors and professionals is the Podcast format. Through a podcast it is possible to explore multiple topics of interest and to consult personalities and experts who provide interesting insights. One initiative within the programme is based on the creation of a podcast "Museum Up Podcast", available at the following link: <https://reinherit-hub.eu/podcasts/>

While the digital theme encompasses complex systems and tools, it is important not to forget that the web is the main face or digital double of the museum or heritage site. Therefore, some of our concerns should be to facilitate information through. In summary, the extended museum or digital visitor experience must strengthen efforts transversally within the institution to enrich navigation. The virtual visit can be optimized based on three pillars: research on visitor experience, technical planning based on UX design, and transversal participation of departments to maintain innovation and quality in the virtual offer.



The online visit is crucial to help visitors to make a physical visit, so it is crucial to apply collaborative strategies to encourage this type of visit within the website. In this sense, ticketing strategies can help to facilitate visitation circuits for both tourists and residents. This strategy consists of generating agreements between museums or heritage sites so that with a single ticket it is possible to make several visits. Among its advantages are: facilitating access for a special price to visitors, facilitating the purchase of tickets on digital platforms, allowing collaboration between tourist agencies and museum institutions, generating circuits of visitation that decongest traditional tourist areas, generating thematic circuits and linking different exhibitions in various centers.

An example of this is the ticketing strategy applied by Visit Barcelona, which has generated various types of packages according to themes, for example Arqueoticket, which brings together archaeological spaces and archeology museums, or Articket, which brings together art museums.



◆ © Juliet Furst, Unsplash

### 4.3.4 Digital frameworks and ICT tools to communicate with visitors

*By Paolo Mazzanti and Marco Bertini*

New digital technologies and digital museology provide approaches and technical tools that allow visitors to have a sensory, emotional, and physical experience through the integration of various digital frameworks from ICTs and data processing. In the last decade, changes brought about by new social dynamics, where digital plays a leading role, encourage museums and heritage sites to offer an enriched vision of the objects and spaces they protect by transforming these physical assets into digital spaces.

The transformation of the physical attributes of museums and heritage sites through the application of various digital techniques allows for the reformulation of the narrative of the visit, culture, art, science, and heritage. Therefore, it is important to understand their utilitarianism and typography in curatorial projects of any type, in any geographical condition, and for all potential visitors.

Some of the benefits that ICTs offer to strengthen communication with visitors in the contemporary sector are:

- Mobilizing the museum or CH to other public spaces through different interfaces is possible (e.g. digital domes)
- Rediscovering heritage or objects from a technological perspective
- Creating new experiences from archives and different collections of a different category (e.g. audio archives, photography, moving image, among others)
- Addressing narrative and knowledge needs that are not possible with traditional museography.
- Taking advantage of socialization through screens and devices intergenerationally
- Transforming narration and navigation systems at the visit site
- Taking advantage of the benefits of digital restoration to optimize image detail without affecting the quality condition of the original pieces
- Benefiting communities resistant to heritage losses such as endangered heritage and heritage at war.
- Integrate intangible heritage elements into exhibition narratives.

Utilizing innovative digital tools can effectively motivate diverse audiences to experience, enjoy, and actively participate, especially tools that focus on participatory storytelling, user

customization, mobile technologies, and intelligent applications for game-based learning in immersive environments, as these tools play a significant role in fostering engagement. Digital and mobile applications leveraging Computer Vision (CV) and Artificial Intelligence (AI) can provide playful interactions within the museum environment. Gamification and learning-by-doing techniques encourage deeper exploration and study of artworks. Visitors can select objects and interact with them, creating new narratives and generating user-generated content to share on social media<sup>14</sup>. Development of innovative tools can be critical for small-medium organizations since they may lack adequate competences in the use of bleeding-edge technologies, as well as the capabilities to maintain and update such tools. Using selected open-source solutions helps to reduce the risks, allowing an easier transition between third party technology providers.



◆ © Danist Soh, Unsplash

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<sup>14</sup> Visitors' preferences on using digital tools and a focus on the User-Experience are surveyed on ReInHerit D3.4 Consolidated Report on ICT Tools in CH Management (pp. 17-38).

The main innovative digital tools for communication and interaction with visitors in cultural contexts are as follows:

## THE MAIN INNOVATIVE DIGITAL TOOLS FOR COMMUNICATION AND INTERACTION WITH VISITORS IN CULTURAL CONTEXTS

### VIRTUAL REALITY (VR)

VR technology creates a simulated environment that immerses visitors in a virtual world. In museums or heritage sites, it can be used to provide interactive and immersive experiences, such as virtual exhibitions or historical reconstructions. Visitors can explore these virtual environments, interact with digital artifacts, and gain a deeper understanding of the museum's collections. It is especially appealing to younger audiences who are more familiar with digital technology and crave interactive experiences.

### GAMIFICATION

Gamification involves incorporating game elements into non-game contexts, such as museum visits. By introducing challenges, quizzes, or interactive games, museums can make the visit more enjoyable and educational. Gamification encourages active participation, rewards, and friendly competition, fostering a sense of achievement among visitors. This is particularly effective in engaging younger audiences and families, as it adds an element of fun and interactivity to the museum experience.

01

### IMMERSIVE VIRTUAL TOURS

These tours offer interactive elements, such as 360-degree views, detailed images, and informative audio or text descriptions. They enable visitors to navigate through museum spaces, view exhibits, and access additional information about artworks or artifacts. It is particularly beneficial for remote or physically challenged audiences who may not have the opportunity to visit the museum in person.

02

### AUGMENTED REALITY (AR)

AR overlays digital content onto the real-world environment, blending the physical and digital realms. Museums can utilize AR to enhance visitor engagement by providing additional information, multimedia content, or interactive elements through mobile devices. For example, AR can enable visitors to view 3D models or animations overlaid on top of exhibits, bringing them to life and offering a new perspective. It can energize the experience for children who are not of reading age.

03

### WEB APPS

They can provide access to audio guides, exhibit information, interactive maps, and multimedia content. Additionally, apps can facilitate wayfinding, allowing visitors to navigate the museum easily and customize their visit based on their interests. These apps cater to various audiences, from tech-savvy visitors who seek detailed information to families looking for interactive and educational activities.

04

05

In the case of cultural tourism, these technologies can be used to enhance and facilitate the time spent visiting cultural destinations, offering customised content and facilitating the visitors journey stages, tools that will make the destination more competitive. In this sense, it is important to diversify the activities of cultural tourism by designing new cultural experiences and services with the application of new Information and Communication Technologies (ICT) through synergies with other organizations and cultural heritage sites and those responsible for the development of activities in creative tourism, smart tourism and cultural tourism in each destination<sup>15</sup>.



<sup>15</sup> For more details on the possibilities and advancements in the field of digital tools for museums and cultural heritage sites see "D3.4 Consolidated Report on ICT Tools in CH Management".

In this sense, digital trends based on AI/CV technologies are being used to improve cultural visits to museums and heritage sites, increasing the possibilities of communication and collaboration with the public. Some of the utilities of AI/CV based tools for improving communication and collaboration with visitors are:

### UTILITY OF TOOLS BASED ON AI/CV TO IMPROVE COMMUNICATION AND COLLABORATION WITH VISITORS

<b>Playful Approach for Digital Learning</b>	<p>Can introduce a playful approach to digital learning, making museum visits more engaging and interactive. For example, interactive chatbots powered by AI can engage with visitors, providing real-time information, answering questions, and offering interactive quizzes or games related to the museum's exhibits. This gamified learning experience motivates visitors to actively participate and acquire knowledge in a fun and memorable way.</p>
<b>Emotional Motivation to Learn</b>	<p>Leverage emotional motivation to enhance the learning experience in museums AI/CV technology can analyse and increase the level of visitor interaction with exhibits. Based on this information, the system can also adapt and personalise the content or experience to meet the visitor's interests and engagement. This personalised approach triggers a deeper connection with the exhibits, fostering a sense of emotional engagement that motivates the learning process.</p>
<b>Adaptive Recommendation Systems</b>	<p>AI-powered recommendation systems can analyze visitor preferences, historical data, and interactions to provide personalized recommendations for exhibits, events, or related content. By understanding individual interests and behavior, museums can offer tailored suggestions, encouraging visitors to explore more and delve deeper into their areas of interest. This adaptive approach enhances the overall visitor experience by curating a personalized journey through the museum.</p>
<b>Intelligent and Smart Guides</b>	<p>AI/CV technologies can transform traditional audio guides into intelligent companions. By utilizing computer vision, cultural and tourism guides can recognize and provide information about specific artworks or artifacts simply by pointing a smartphone or device at them. The guides can also adapt the content based on the visitor's profile or preferences, offering in-depth insights, historical context, or interesting anecdotes. This personalized audio guide experience ensures a deeper understanding and connection with the museum's exhibits and cultural sites and related landmarks.</p>
<b>Emotional Recognition and Feedback</b>	<p>AI/CV tools can capture and analyze visitors' emotions during their museum visit, enabling museums to gather valuable feedback on exhibit experiences. Emotion recognition algorithms can detect expressions of joy, surprise, curiosity, or confusion, helping museums understand the effectiveness of their exhibits and adjust accordingly. This real-time feedback allows for continuous improvement and a better understanding of visitors' needs and interests.</p>

Emerging areas such as digital museology, medium and long-range laser scanning, deep mapping, or experimental museology offer a multidisciplinary vision from which museums and world heritage sites can reinterpret their visits from the vision of an institution that safeguards objects to sources of data that can be manipulated and generate a memorable multisensory meaning for the visitor. The challenge is to turn the objects in the spaces into devices and resources that can be material and experimental, spatial and interactive. Regardless of the technique desired to improve communication and cooperation between the institution and its audiences during their visits, it is important to ensure that the interface used meets the characteristics of being: Social - Interactive - Emotional.<sup>16</sup>

The integration of digital tools and innovative technology into the museum experience involves a critical analysis of challenges and best practices. In the modern era, this integration has become a key means of engaging visitors and offering novel ways to interact with art and culture. However, it is not without its challenges, especially when addressing diverse audiences such as the elderly, people with physical or mental disabilities, and children. Addressing the needs of these specific groups requires critical thinking and creative solutions.

For the elderly, it is crucial to create user-friendly interfaces. Many older individuals may not be familiar with advanced technology, which requires intuitive designs that facilitate navigation. In addition, providing clear and concise instructions within the interface is crucial to ensure a smooth experience. These measures not only enhance the digital engagement of elderly visitors but also empower them to explore artworks with confidence.



The ReInherit Toolkit is designed specifically for cultural heritage institutions, including museums, and offers a range of tools and applications to enhance visitor engagement and digital learning experiences. The open-source nature of the Toolkit ensures that it is accessible to a wider community of developers, researchers, and museums, enabling collaborative innovation and customization to suit specific museum needs. This open model fosters the sharing of ideas, expertise, and resources, promoting the growth of a vibrant ecosystem centered around digital technologies in cultural heritage.

The Toolkit provides a variety of applications that leverage AI/CV technologies to enrich the museum visit experience. It utilizes modern AI technologies that can be implemented on mobile devices, allowing for cost-effective deployment and maintenance. The toolkit offers reusable components as building blocks for applications and provides sample apps as examples of their usage. It embraces an open-source approach, enabling small and medium-sized cultural organizations to develop their own applications or adapt those from the ReInHerit toolkit. Additionally, the toolkit includes guidelines for CH managers and developers about the possibilities and performances of AI systems designed for mobile devices.

<sup>16</sup> For more details about AI/CV based tools see "D3.2 ReInherit Toolkit Strategy", "D3.3 / D3.8 "ReInHerit Toolkit Phase 1 and 2"

Users with motor problems face unique challenges when using digital interfaces. Therefore, incorporating alternative navigation methods, such as voice commands or touch gestures, can significantly improve accessibility for this group. By adopting inclusive design principles, museums can ensure that everyone, regardless of their physical abilities, can fully participate in and enjoy the technology-driven experience. People with psychic difficulties, such as cognitive impairments, require content presented in a clear and comprehensible manner. This involves using simple language, straightforward explanations, and concise descriptions.

By doing so, museums can ensure that the content is accessible and meaningful to a wider range of visitors. Children, as digital natives, appreciate interactive and playful experiences. Integrating technology in a way that offers a playful and engaging encounter with art can capture their attention and stimulate their curiosity. Through gamification, technology becomes a medium for learning and exploration, making the museum visit a memorable and educational experience for young visitors.

In addition to catering to specific demographics, technological integration can also attract individuals who might not typically frequent museums. Enhancing the digital experience for visitors involves implementing a set of best practices. Intuitive user interfaces, clear and concise instructions, accessible content (such as captions and audio descriptions), reliable technology performance, and safeguarding user data privacy are all vital considerations. Regularly gathering visitor feedback and using it to make iterative improvements ensures that the digital interaction remains engaging and user-centric.

Another aspect to be considered when developing these types of applications is that of data privacy, i.e. dealing with all the requirements often imposed by development platforms (iOS and Android impose a set of rules to access personal data) and regulations like GDPR. In many cases it is possible to implement advanced applications without the necessity to deal with personal data<sup>17</sup>.

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<sup>17</sup> All the apps of the ReInHerit toolkit have been designed so to avoid to use personal data, see D3.4 Consolidated Report on ICT Tools in CH Management.

Finally, remember, some of the main challenges in the application of digital technologies in the visits are:

- Preservation and presentation of the living heritage in suitable interfaces for its conservation.
- Criteria for protection of digital replicas, ownership systems.
- The need for interdisciplinarity in long-term collaborations to produce concrete products.
- The adaptation to increasingly demanding audiences with digital experiences.
- Correct and regulated use of tools based on generative AI, related to the Ethical implications, protection of the user's personal data and the accuracy of scientific information generated.
- The process leading to the selection, design and development of advanced ICT tools must be included in institutions' strategic documents.

**Primavera (painting) 1482**



**Artwork Chat**

The painting depicts the lush growth of Spring, with allegorical references to classical mythology and Renaissance Neoplatonism.

3:44 PM

What about the historical context of this painting?

3:44 PM

The painting is an allegory of the Renaissance Neoplatonism which was popular in Florence at the time, and is part of the Uffizi Gallery's collection since 1919.

3:45 PM

What flowers are in the painting?

3:45 PM

Click here and type a question!


◀ © ReInHerit project

### 4.3.5 Smart ticketing for museums and heritage site for enhanced cooperation and visitor experience

By Manos Vougioukas

Smart and Integrated Ticketing (SIT) may form an appropriate basis for enhanced cooperation between museums and heritage sites, also facilitating cultural tourism. The introduction of SIT requires a complex process that requires the synchronized activity of heterogeneous stakeholders. It should follow a sustainable work programme that requires mutual work between museums and cultural heritage sites but also private collections and other private or public cultural attractions. It requires close relations between cultural and tourism sector, meaning common marketing programme, attainability, and logistic arrangement, all planned upfront.

Therefore, it is necessary to distinguish several layers that bring different entities into the executive circle of integrated ticketing. Stakeholders that are involved in the SIT system must agree on several issues: technical specifications and data management, legal and economic aspects, allocation of revenues, the distribution model, identification of leading institutions, etc.

- Types of integrated ticketing for museums and CH sites;
- Ticket that includes entry to museums and cultural heritage sites;
- Ticket that includes entry to museums, CH sites, but also other cultural sites or
- Events;
- Ticket that includes entry to museums, CH sites, but also other tourist content (natural and botanical parks, zoo, adrenaline parks, kids' playgrounds and other)
- Ticket that includes entry to museums, CH sites but also includes discounts to public transport (including hop on-off bus), restaurants, hotels, spa, gym or other private sector activities.

Integrated ticketing assumes the synchronized activity of heterogeneous actors that is why it requires accomplishment of technological characteristics and at the same time fulfilling legal and economic aspects. Integrated package assumes so called destination card dedicated to a specific region or city. It usually includes discounted prices or smartphone-based applications that are tailor made for destination consumers.

Smart ticketing is ticketing enhanced by digital technologies that also use data gathering, data analysis, real-time information monitoring, context awareness and other complex ICT to enhance the tourist experience during visits. Although it is commonly used already; from simple solutions like online ticket sales on websites to complicated solutions that help tourist attractions (culture or other) to handle visitors, the research focused on this is greatly lacking. Regarding smart ticketing, the research has focused mainly on transport options and smart cards for city residents.



◆ ©Zalfa Imani, Unsplash

Ticketing is a very specific point of connection between visitors and destinations. For the visitor, it has to be verified, safe, simple, but also informative, helpful and accurate. The visitor wants a verified source of purchase that has a simple system of payment as well as easy access to information about the ticket, time of visit and purchase itself. For the tourist cultural attraction, the ticketing system should primarily serve to simplify the transaction process and to manage visitors, but also to gather information about the visitors and increasing accessibility.

For the implementation of smart ticketing, the cultural attraction or destination has three options:

1. Website integration,
2. Tourist
3. Other e-commerce platforms.

The first option can be from the simple purchase system to complex ticketing and booking system that tracks visitor numbers, has the option of time ticketing, multi room or venue set up, opt for registration, donations, scanning and access control. It depends on the institution size and requirements how complex system is required.

Tickets can be but do not have to be smart tickets, even though they are purchased through the smart ticketing system. An institution can opt to have smart tickets – digital tickets that can be shown on the mobile device, tickets that relate to the visitors' personal data or code. What is important that the institution facilities and staff are educated and equipped to receive the visitors and deal with the possible difficulties. This can contribute to ecological and green strategies of the institution. The collection of personal data should be handled with care and safety, but it can be useful especially if it is the case of specific accessibility requirements. In any case Privacy Policy should be instated, GDPR respected, and customer consent requested in cases when needed.

#### 4.4 Make it your own!

With the ideas gathered in this chapter, we present a self-assessment worksheet on the next page. Remember to do the exercise individually and discuss it with the team. It is useful to share this devaluation table with the team directly related to the activities and with collaborators and internship collaborators with different ideas and visions.

START	STOP	CHECK		
		We are working on it, we can share our experience	We are working on it	No, we should get to work
We have well-defined and characterized our different types of visitors.	<ul style="list-style-type: none"> <li>● Do we have data extracted from other sources to know them better?</li>   <li>● Do we have activities and exhibitions designed with their interests in mind?</li>   <li>● Do we have identified the information points to know their opinion of the visit experience?</li> </ul>			
We have answers and are prepared for different accessibility scenarios.	<ul style="list-style-type: none"> <li>● Do we have identified the points where adaptations are necessary for free access, and are we working to improve them on an ongoing basis?</li>   <li>● Have we conducted focus groups with members of the groups we want to address to learn about their concerns?</li>   <li>● Do we continuously review the protocols and speeches that are handled in all areas?</li>   <li>● Do we constantly train all staff members to develop the necessary sensitivity to make the institution accessible and open to all?</li> </ul>			
We consider digital communication with our visitors as a backbone to be a more open institution.	<ul style="list-style-type: none"> <li>● Do we know our weak points in terms of digital platforms and do we have an action plan to improve them?</li>   <li>● In addition to generating content on social networks, do we generate collaborations and transmedia content?</li>   <li>● Do we include different departments, experts and professionals in the creation of content?</li> </ul>			



## 5 Sustainable Cultural Tourism

### 5.1 Strategic communication and collaboration mapping for sustainable cultural tourism

In the global scenario, sustainable tourism faces significant challenges in terms of cooperation and communication. Identifying the map of strategic stakeholders to strengthen cooperation and communication processes and strategies has key benefits, such as the establishment of common programs and goals, and the identification of problems and their solutions. Better outreach, amplification of social, environmental, and cultural impact, as well as the application of cross-cutting communication and collaboration strategies.

About current needs, the map of audiences can place the DMO (Destination Marketing Organization) at the centre as an asset for collaboration between public and private stakeholders; an intelligent DMO that takes into account sustainability, competitiveness, quality, co-creation of visitor experiences, hospitality, understanding of impact on the local community; where each stakeholder can contribute to the sustainable development of the territory.

The map of audiences based on communication and cooperation from the DMOs should propose a new role for the DMOs beyond marketing and promotion as dynamic agents of strategies that respond to the present and future needs of visitors and local regions. It must include actors that contribute to the understanding of the context through data and studies, such as academic entities or those that have a role in the active economic growth of the territory, such as local entrepreneurs. These are key to raising the value proposition in terms of sustainability of the territories, as well as museums and organizations that promote culture, heritage, and conservation.

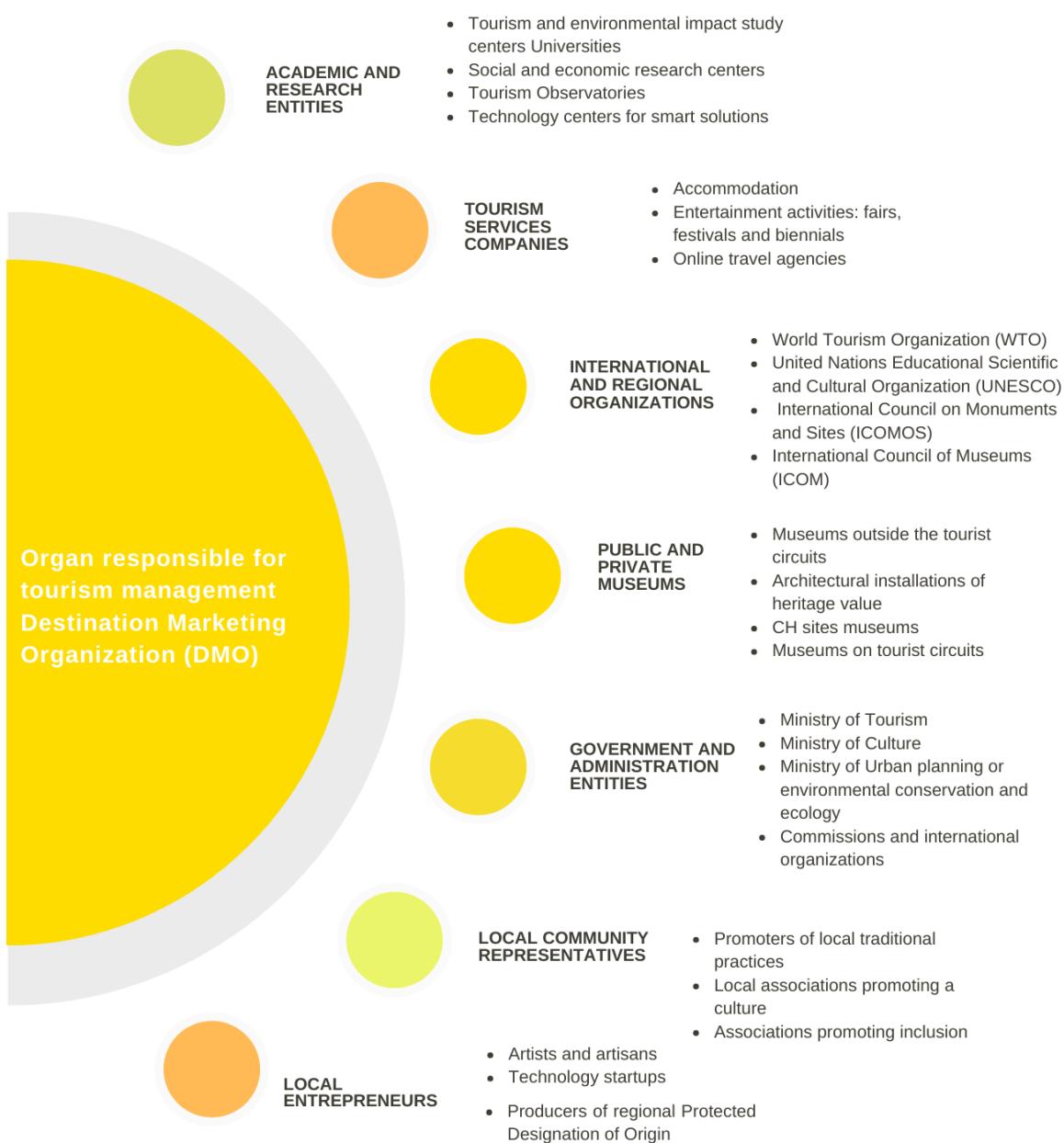
It is important to emphasize that each territory can design its map of publics considering their needs at local and regional levels. Hence, the importance of establishing a hierarchy or weight for each stakeholder according to the objective to be achieved with each one. Let us remember that one of the most important roles of the map is risk mitigation and optimization of specific collaborative and communicative flows. The following figure shows the main agents in the current scenario that can strengthen their degree of contribution to sustainability and the subsequent co-creation of activities and strategies in destination.



The strategic audience map must be specific, with the names of the institutions in the territory and the possible decision-makers or those responsible for decision-making.

## STRATEGIC COMMUNICATION MAPPING FOR COOPERATION IN SUSTAINABLE AND CULTURAL TOURISM.

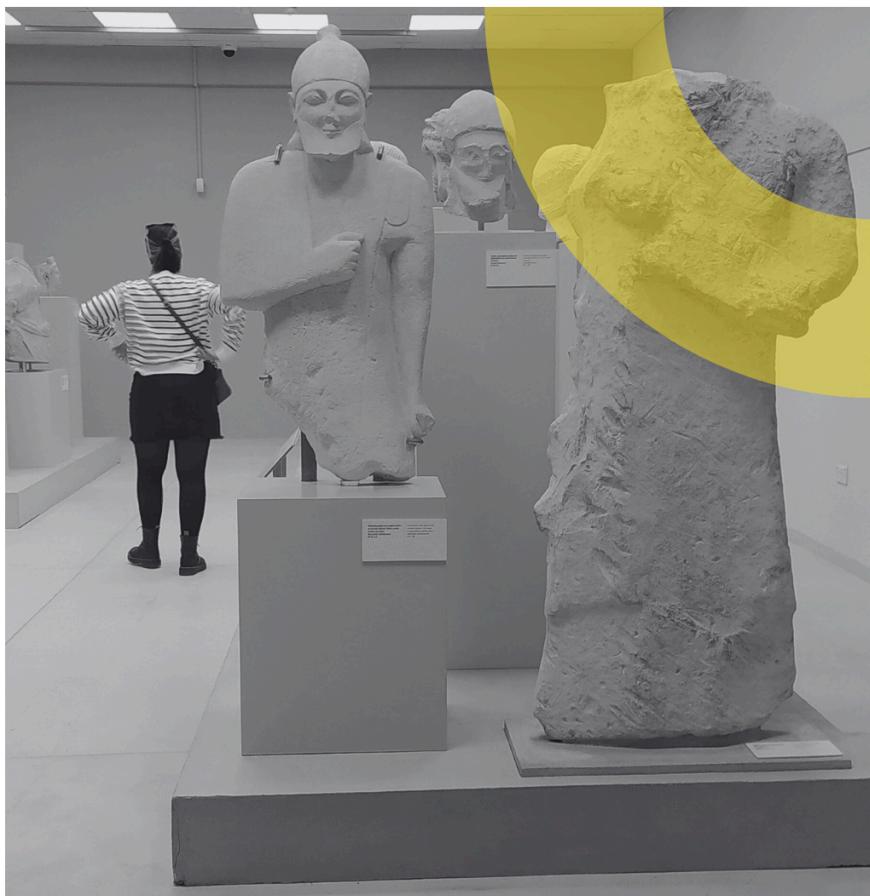
The public map must be designed as a tool that addresses the present and future needs of the environment, local inhabitants and visitors. It is vital to highlight the agents who can guarantee and develop actions for optimal use of environmental resources, respect for sociocultural authenticity and promotion of viable economic activity.



## 5.2 Sustainable partnerships between the tourism industry, the cultural heritage sector, and museums

By Jordi Treserras

As mentioned in previous sections, the participation of all actors in sustainability is essential for successful collaboration. Therefore, establishing a shared vision through the identification of common objectives, fostering equitable benefit-sharing among local communities and stakeholders, and implementing measures to both combat and raise awareness of the impact of climate change on heritage sites and museums, forms the cornerstone of sustainable partnership.



◆ © Archaeological Museum of Larnaca

In this regard, the ICOMOS International Charter on Cultural Heritage Tourism (2022): This document offers a set of principles that represent a guiding framework on this topic absent in other documents related to cultural heritage or tourism and which we rescue in the following figure:



In the same vein, measures to combat and promote awareness of the impact of climate change on heritage sites and museums are the second block of strategic measures. More and more heritage sites and museums have a section focused on environmental sustainability in their management plans. For example, the HICIRA<sup>18</sup> project was one of the pioneering projects that established the need for the implementation of minimum standards to be carried out in a flexible way and to be maintained as a starting point for future improvements. It proposed a methodology through an appropriate reporting system to monitor and evaluate the results achieved. In this sense, the following environmental impact indicators were established to allow effective monitoring.

## ENVIRONMENTAL IMPACT INDICATORS

The HICIRA project

Ratio of green areas = Green areas (m<sup>2</sup>)/land area (m<sup>2</sup>).

Energy consumption = Annual energy consumption (TOE/year)/number of workers.

Annual energy consumption (TOE/year)/net area (m<sup>2</sup>).

Water consumption = Annual water consumption (m<sup>3</sup>/year)/number of workers.

Annual water consumption (m<sup>3</sup>/year)/net area (m<sup>2</sup>).

Waste production = Annual production of RU (tons/year)/no. of workers.

Selective waste collection = Annual production of RU (tonnes/year)/number of workers

Number of climate control devices.

Number of environmental correction devices.

<sup>18</sup>

[https://www.diba.cat/c/document\\_library/get\\_file?uuid=63952a92-928c-4eb9-a698-587bea5cf637&groupId=99058](https://www.diba.cat/c/document_library/get_file?uuid=63952a92-928c-4eb9-a698-587bea5cf637&groupId=99058)

To these indicators we would have to add the one linked to the implementation and/or use of renewable energies in search of a balance to guarantee sustainability and heritage conservation.

In a context of unstoppable development of renewable energies in our landscapes, towns, and cities, in response to the climate emergency and the current great energy crisis, it is necessary to develop and implement measures to make the values of our rich cultural heritage compatible with the implementation of these more sustainable forms of energy for the planet. To achieve this, planning on a territorial scale and a thorough analysis of each location is essential, so that decision-making is simpler and the impact on cultural assets (material and intangible) is as minor as possible.



#### A resource to implement

The Heritage Impact Assessment (EIP) methodology, published in mid-2022 by UNESCO and its three consultative bodies, ICOMOS, IUCN and ICCROM, is recommended to advance the much-desired compatibility between renewable energies and conservation and protection of natural resources. values of our cultural heritage. It is key to promote dialogue and, from the moment of planning, carry out an identification of interest groups and consultation processes to include the local community, civil society entities and any other agent involved, identifying risks to present mitigation actions. Therefore, it is essential to provide updated examples of good practices that show the best way to combine sustainable facilities with the preservation of cultural heritage and its landscapes to increase acceptance towards the transition.

Available at:

<https://whc.unesco.org/en/guidance-toolkit-impact-assessments/>

An important reference to take into account is *Principle 7* of the ICOMOS Charter on Cultural Heritage Tourism: Integrate climate action and sustainability measures in the management of cultural tourism and cultural heritage. Cultural tourism should take actions to mitigate, reduce and manage climate impacts. For ICOMOS, compliance should be ensured through incentives, regulations, policies and guidelines that are updated as necessary. In this regard it should be considered that:

## CLIMATE ACTION AND SUSTAINABILITY MEASURES IN CULTURAL TOURISM AND CULTURAL HERITAGE MANAGEMENT ICOMOS



1

Tourism and visitor management must contribute to the effective reduction of carbon and greenhouse gas emissions, waste management, reuse, recycling and conservation of energy and water, and transportation and ecological infrastructures, complying with national and international objectives in this area. Measures to support the conservation of heritage, biodiversity and natural ecosystems should be a priority in the planning, implementation and evaluation of tourism and visitor management. The adaptive reuse and rehabilitation of built and vernacular heritage can help mitigate climate impact and provide a more authentic experience for visitors.



2

Climate action strategies must consider traditional ownership, knowledge, and practices. Communication, information, heritage interpretation, education and training must strengthen awareness of the climate emergency and its consequences for natural and cultural heritage, especially where communities and destinations are at risk. The presentation and interpretation of heritage sites open to the public must also contribute to these tasks, including messages about the climate impact on conservation and the environment. This invites us to consider the innovative technologies that can be used for these purposes. Climate change demands a transformative and regenerative approach to cultural tourism where priorities focus on building resilient and adaptive communities and heritage sites.

To foster collaboration, developing tourism products and services and promoting intersectoral training are crucial. Numerous guidelines for these initiatives are provided by conventions and programs, most notably the United Nations conventions (UNESCO, WTO, and FAO), which emphasize sustainable cultural tourism as an opportunity for local communities within a framework of sustainability.

UNESCO's cultural conventions recognize tourism as a strategic factor in heritage management and urban planning, emphasizing its significance and potential benefits. Ignoring its impact can lead to detrimental consequences. Urban heritage is a valuable social, cultural, and economic asset, embodying the enduring values society has bestowed upon it throughout history. Rich in traditions and cultural diversity, urban heritage warrants more comprehensive conservation efforts that extend beyond physical preservation to encompass the human dimension, including the communities' diversity, traditions, and cultural values.

By connecting the tangible elements of urban heritage with the customs of each place, we can safeguard the heritage's original meanings, maintain its connection with the community, and ensure the survival of the uses they have given it. This approach provides an alternative to gentrification, which, while revitalizing areas, often strips them of their original significance and identity.



▲ © Museum of Cycladic Art

In terms of sustainability for tourism, it is important to refer to the 2003 Convention for the Safeguarding of the Intangible Cultural Heritage, which aims to ensure the manifestation and transmission of the practices, representations, expressions, knowledge and skills that communities, groups and, in some cases, individuals recognise as part of their cultural heritage.

According to this Convention, when tourism is linked to intangible cultural heritage, States Parties need to take measures to ensure: first, that communities, groups and individuals are the primary beneficiaries of any tourism related to their intangible cultural heritage; second, that they have a leading role in the management of such tourism; and, third, that the viability, social functions and cultural significance of such heritage are not compromised by such tourism. A very interesting aspect is the initiative focusing on living heritage and food traditions.



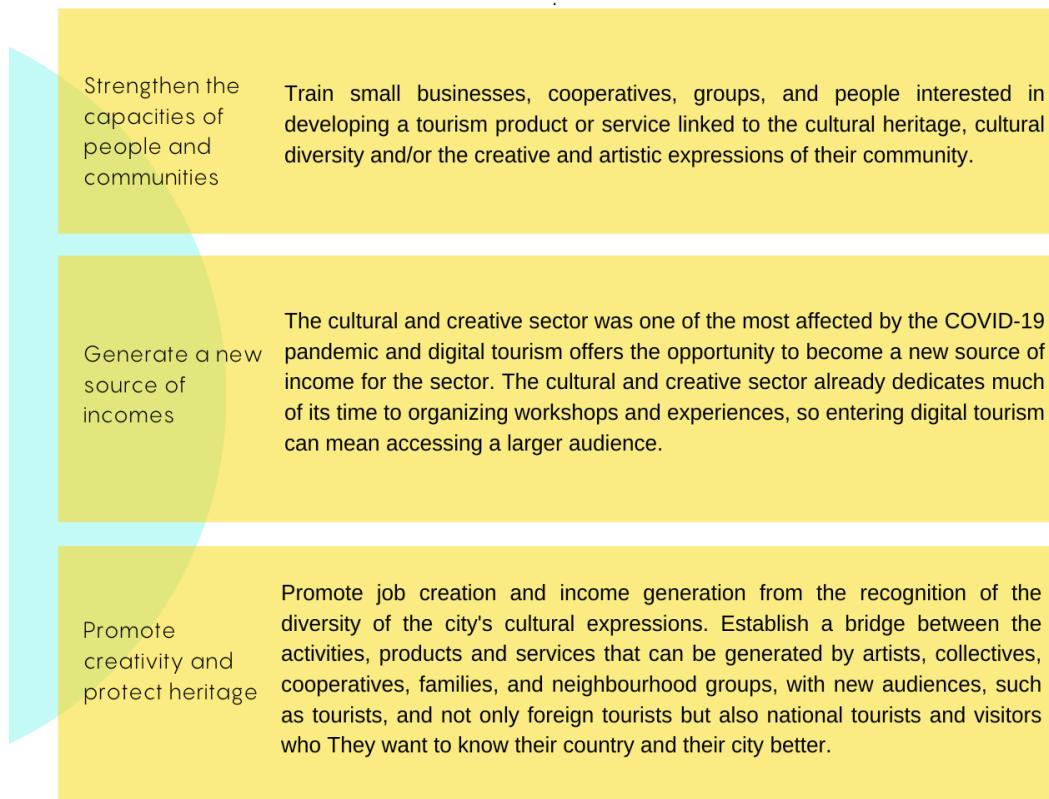
▲ © Angela Compagnone, Unsplash

Innovative tourism experiences promote the safeguarding and protection of cultural heritage and its cultural expressions, both in rural and urban environments. Cultural and creative tourism has positioned itself as a source of economic development and sustainable impact that seeks to generate innovative experiences for visitors through mechanisms that safeguard and promote local heritage and cultural expressions.

In 2022, UNESCO has worked on a programme to promote innovative tourism experiences in cultural and creative tourism that has the following objectives shown in the figure below:

## OBJECTIVES FOR TOURISM EXPERIENCES IN CULTURAL AND CREATIVE TOURISM

UNESCO 2022



Finally, In order to meet sustainability criteria, in addition to the objectives outlined above, it is possible to analyse tourism experiences based on the following selection criteria:

- Inclusion and accessibility: Does the experience have the capacity to receive people with disabilities and/or can it be adapted if required? Does the team that manages the experience include people with disabilities? If yes, describe how you consider them. If not yet, describe how you could consider them in future.
- Decentralization: Does the experience allow the participation of areas, towns, communities, groups, or people who commonly do not have opportunities to access the economic benefits generated by tourism? (seniors, native and indigenous peoples, gender and sexual diversity, people, and peripheral areas). If yes, explain which groups or people? Where does it occur and how is it achieved? If not, explain how it could be promoted in the future.
- Local economic impact: Does the experience motivate visitors and/or tourists to consume products made by the community as part of their visit? For example: water and food, services, transportation, souvenirs and/or crafts, local products. If yes, describe which and who are the people who provide them. If not, describe how it could be done in future.
- Heritage and cultural expressions: Does the experience include any artistic expression? Does the experience show the value and encourage knowledge of any tradition, building, monument, or historical site? Does the experience make visible and respect the cultural identity of the community where it occurs? Do artists, cultural managers or people who practice any cultural tradition participate in the experience? If yes, which ones, who and how? If not, how could it be done in the future.
- Gender equality: Does the experience include women and men in your team? If yes, is the safety of the women who are part of the team guaranteed and are they part of the decision-making process? Does the experience seek to ensure that women and men have equal access to the economic benefits that it will generate (direct and indirect)? For example, women and men receive the same pay for equal work.
- Sustainable Social Impact: Does the experience contemplate reducing its impact in terms of the generation of rubbish and solid waste, the use of single-use plastics, and the consumption of electricity and water? If yes, describe how it is contemplated. If not, describe how it could be contemplated in future.

## 5.3 Provisions for roadmaps in sustainable tourism with the cultural heritage sector

By Jordi Tresserras

Sustainable cultural tourism and collaboration and communication with the cultural heritage sector are essential for the future of Europe, because it can help to protect the environment, preserve cultural heritage, and create economic opportunities, ensuring that cultural tourism is developed and managed in a sustainable way.

To achieve this these objectives, it is necessary to identify the key challenges and opportunities facing these sectors, and provide recommendations for how to promote collaboration and communication in the sustainable cultural tourism.

With this regard, it is recommended to follow the roadmap proposed in 'Thessalia Charter for Sustainable Cultural Tourism' promoted by the European Cultural Tourism Network (ECTN)<sup>19</sup>.

This Charter is a statement of principles on regional policies and strategies which guide the development, planning, management, operations, and promotion of cultural and heritage tourism in the European Union and beyond, for the benefit of destinations, communities, businesses, citizens, and visitors. The third edition of the Charter is a contribution by ECTN to the 'European Year of Cultural Heritage 2018', launched in October 2018, and in particular, to the 5<sup>th</sup> initiative on 'Tourism & heritage: responsible and sustainable tourism around cultural heritage' and supported by Interreg Europe CHRISTA & Cult-RInG projects.



◆ © Simon English Unsplash

This Charter proposes the following actions:

- To strengthen the procedures and instruments for cultural tourism development and promotion, particularly in the form of implementation plans for the transfer and adoption of good practices and through effective destination management.
- To involve all key stakeholders in close cooperation between cultural and tourism sectors, including public, private, and voluntary sectors, as effective partnerships.
- To strengthen the information means, channels and materials for the promotion, education, study, and awareness-raising of visitors before, during and after their visits, including creation of multilingual promotion materials.
- To create place marketing frameworks, strategies, plans and channels for cultural tourism in all forms.
- To strengthen the sustainability and competitiveness of European tourism through cultural routes and cultural landscapes
- To encourage and facilitate the networking of cultural tourism destinations, also including policy makers, practitioners, and researchers.

Likewise, within the framework of the Cult-Create project, the European Cultural Tourism Network, which is part of the European Alliance for Cultural Heritage 3.0 led by Europa Nostra, has proposed a decalogue for the development of sustainable tourism that is key to apply to the cultural heritage and museums sector to face the current challenges of tourist destinations that have opted for identity as the axis of development. It is suggested:

1. Make a map of the agents and experiences with tourism potential of the destination and the main operators and initiatives (differentiating consolidated, emerging projects and new initiatives).
2. Generate a joint brand, create, and consolidate a public-private management structure
3. Identify training needs and develop a training and technical assistance program
4. Define a tourism strategy for the destination. This contributes to local development by helping to diversify the supply, deseasonalize tourist activity, decentralize demand, and increase the visitor's total and daily spending.
5. Create a tourism plan with objectives to be achieved in the short, medium, and long term, with actions to be carried out and expected results with their corresponding verifiable indicators, considering the 2030 Agenda and the 17 Sustainable Development Goals.

6. Generate synergies between the local community and visitors. To do this, it is necessary to articulate spaces for community participation in tourism plans not only in the design and planning processes but also in their execution and implementation.
7. Develop key instruments as e.g., an agenda with programming of tourist interest and a catalogue of tourist experiences to do at the destination.
8. Design a promotion and marketing strategy, identifying the demand and the agents and channels to make the destination's offer reach the tourist operators and agents, the agents and media and the tourists, both the real ones who already know the destiny as well as potentials.
9. Establish mechanisms for measuring the economic impact of tourism generated by the local tourism ecosystem through indicators
10. Promote strategic agreements between agents that contribute to the cultural, economic, social, or environmental development of the destination.



◆ © Quino Al , Unsplash

Finally, as a prospective, it is necessary to highlight what can be considered the risks for the sector in the next five years. The greatest need that is identified as a priority to confront the risks that affect the sector is the need to have quantitative and qualitative data that allow us to have a diagnosis that is as real as possible, as well as the needs to be able to act and generate a plan of action, coordinated action and, above all, effective and efficient. To maximize the socioeconomic benefits of cultural and creative tourism, it is necessary to follow the following guidelines to:

- Diversify the offer through differentiated cultural services and activities, thus generating the greatest possible opportunities for productive inclusion.
- Deseasonalize tourist activity in a balanced way throughout the year, generating stable jobs and guaranteeing the sustained performance of cultural facilities and companies in the sector<sup>20</sup>.
- Decentralize demand, distributing it territorially with adequate management of tourist flows and the establishment of carrying capacity thresholds (thus avoiding areas of tourist saturation).
- Increase the total and daily expenditure of the tourist visitor whenever possible, avoiding planning only based on the volume of visits, and, on the contrary, offering segmented products based on different audiences and generating tourist spending opportunities throughout the entire season. tourist experience.

On the other hand, to develop urban heritage tourism activity following these guidelines, it is necessary to respect the following three premises:

- Governance and sustainability: It is necessary that there be a clear and strong link between the agents responsible for urban territorial planning, tourism, and cultural culture, avoiding discrepancies in management because they are areas with different objectives and values. Therefore, inter-institutional and public-private coordination is necessary, articulating agents from the cultural and tourism sector to promote a consensual urban heritage tourism strategy, based on specific action plans that include objectives, activities, results, indicators, budget, and actors involved, as well as generating financial instruments and investments for their implementation. Likewise, it is key to articulate a strategy where sustainability is transversal from an environmental, sociocultural, and economic perspective. To take on this challenge, different destination management models have been developed, such as consortia, networks, club associations or cultural tourism brands and seals.

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<sup>20</sup> Creation of tourism units in cultural facilities; companies with an offer of cultural activities for tourists (receptive tourism, specialized travel agencies, ...) or differentiated accommodation, such as cultural hotels (heritage and/or historical hotels, art hotels, design hotels, gastronomic hotels).

Initiatives such as the Organization of World Heritage Cities - OWHC<sup>21</sup> and the UNESCO Creative Cities Network stand out.

- People and communities: The second premise is the need to address the preferences and needs of the local community, which seeks to maintain its identity and traditions, while promoting its socioeconomic development. It is necessary to articulate spaces for active community participation in tourism plans, not only in the design and planning processes but also in their execution and implementation since it is the only way to promote the active involvement of residents in the development of tourism of their cities and generating awareness of the inclusion opportunities provided by tourism. It is advisable to generate these spaces for local participation in both emerging and mature destinations, to avoid potential conflicts or overcome existing ones (for example, those derived from mass tourism and tourist gentrification that, in extreme cases, can lead to the feared *tourismphobia*).
- Differentiation and knowledge of the tourism market: The third premise is that the success of tourism activity depends on the ability to differentiate itself from competitors. We must not lose sight of the fact that urban destinations compete in a global market, with a highly segmented, demanding and changing demand and a strongly competitive offer. The experience of different cities shows that the proliferation of cultural facilities does not always correspond to the real demands of visitors, generating difficulties for their subsequent maintenance. Therefore, uniqueness must take precedence in the tourist narrative of heritage and the experiences offered to the visitor. And this depends on a deep knowledge of demand preferences.




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<sup>21</sup> <https://www.ovpm.org/>



◆ © Alexander London, Unsplash

It has been shown that sustainable cultural tourism can provide a very sound and effective basis for facilitating the cooperation and communication between museums and cultural heritage sites. This can be through sustainable tourism products and services around: UNESCO World Heritage Sites (Sustainable Tourism programme and related Heritage Journeys initiative); European Cultural Routes (including Cultural Routes certified by the Council of Europe); European Heritage Label sites; Creative Tourism, including the contribution by Cultural and Creative Industries (CCIs); Intangible Heritage; Industrial Heritage; by Heritage Interpretation, Innovation and Digitisation; as well through 'Smart Tourism' initiatives (including Sustainability, Accessibility, Digitalisation, Cultural Heritage and Creativity, (as in the European Smart Tourism Capital designation of the European Commission) towards 'Smart Destinations' according to the UNWTO initiative. Sustainable mobility (low- or zero-carbon) can be introduced to cultural heritage tourist destinations, linked to Climate Action and the UN Sustainable Development Goals (SDGs, for 2030). All of the above provide significant, effective, and unique synergies to Cultural Heritage management, with closely linked new smart technologies applications and digital transition developments.

## 5.4 Cultural Heritage and Sustainable Cultural Tourism

By Manos Vougioukas



Enhancing cooperation and communication between museums and heritage sites facilitates sustainable cultural tourism development and promotion and vice-versa.

**Cultural tourism** is a type of tourism activity in which the visitor's essential motivation is to learn, discover, experience and consume the tangible and intangible cultural attractions/products in a tourism destination. These attractions/products relate to a set of distinctive material, intellectual, spiritual and emotional features of a society that encompasses arts and architecture, historical and cultural heritage, culinary heritage, literature, music, creative industries and the living cultures with their lifestyles, value systems, beliefs and traditions. (Definition by UNWTO). The convergence between tourism and culture, and the increasing interest of visitors in cultural experiences, bring unique opportunities but also complex challenges for the tourism sector.

According to the UNWTO Framework Convention on Tourism Ethics: "Tourism policies and activities should be conducted with respect for the artistic, archaeological and cultural heritage, which they should protect and pass on to future generations; particular care should be devoted to preserving monuments, worship sites, archaeological and historic sites as well as upgrading museums which must be widely open and accessible to tourism visits".

Although cultural tourism definition is well established by UNWTO, the sustainability aspects of cultural tourism are not self-explanatory. A new definition of **sustainable cultural tourism** has been proposed by the European Commission DG EAC by the OMC Report in 2019, viz:

**Sustainable cultural tourism** is the integrated management of cultural heritage and tourism activities in conjunction with the local community, creating social, environmental and economic benefits for all stakeholders in order to achieve tangible and intangible cultural heritage conservation and **sustainable tourism** development.

European Commission DG EAC, OMC Report 2019

Whereby: **Sustainable Tourism** is tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities. (UNWTO).

Sustainability principles refer to the environmental, economic, and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability. Thus, sustainable tourism should respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values (including intangible heritage), and contribute to inter-cultural understanding and tolerance (UNWTO).

Strong relations between the cultural heritage and tourism sectors contributes to **sustainable cultural tourism** development and promotion. For **museums and cultural heritage sites** it is important to include collaboration with the tourism sector in their strategic plans and documents with the goal of visibility on the tourist market and to widen the reach to new types of audiences/visitors. Tourism is linked with sustainability in the museums and cultural heritage sites because its stakeholders assist cultural heritage organizations to expand targeted audiences, increase visibility and to generate income for future projects.

In particular, the following **cultural heritage** related aspects can contribute greatly to **enhanced cooperation and communication between museums and cultural heritage sites** in terms of **sustainable cultural tourism** development and promotion:

- **UNESCO World Heritage Sites list** seeks to encourage the identification, protection and preservation of cultural and natural heritage around the world considered to be of outstanding value to humanity. The **UNESCO World Heritage and Sustainable Tourism Programme** represents a new approach based on dialogue and stakeholder cooperation where planning for tourism and heritage management is integrated at a destination level, the natural and cultural assets are valued and protected, and appropriate tourism developed. **World Heritage Journeys** is an initiative by UNESCO, in collaboration with National Geographic

and local heritage and tourism managers, to showcase World Heritage destinations and help travellers experience them in ways that protect and support their outstanding value and the local communities that sustain them.

- **European Heritage Label (EHL) sites** are milestones in the creation of today's Europe. Spanning from the dawn of civilisation to the Europe we see today, these sites celebrate and symbolise European ideals, values, history and integration. Since 2013, these 48 EHL sites have been selected for their symbolic value, the role they have played in European history and activities they offer. These EHL sites bring the European Union and its citizens closer together. The European Heritage Label has some differences compared to the [UNESCO World Heritage List](#). European Heritage sites bring to life the European narrative and the history behind it. EHL sites focus on the promotion of the symbolic European values and the significant role these sites have played in the history and culture of Europe. They also offer valuable educational activities, especially for young people. European Heritage sites can be enjoyed singly or as part of a network. Visitors can get a real feel for the breadth and scale of what Europe has to offer and what it has achieved. (European Commission DG EAC). EHL sites can thus provide sound and effective bases for cultural tourism development, including innovative products and services strongly linked to cultural heritage. The potential of EHL sites for cultural tourism has not been exploited yet to a satisfactory level. There are high opportunities for **cultural tourism** related to EHL sites.
- **Cultural Routes** offer a very good basis for effective cooperation between museums and heritage sites. By creating and supporting cultural routes programmes, such as the **Cultural Routes of the Council of Europe**, there are achievements of promoting, preserving and understanding history of different regions and countries through inter-regional exchange of people, ideas and cultures. **Cultural Routes** of the Council of Europe have been established since 1987, stressing the importance of European identities. The Enlarged Partial Agreement (EPA) currently comprises 45 routes contributing to protection and development of natural and cultural heritage. Cultural Routes are used as powerful tools to promote and preserve the EU's shared and diverse cultural identities. Cultural Routes provide a better understanding of the history of Europe through interregional exchanges of people, ideas and cultures. They are a model for grassroots cultural co-operation, providing important lessons about identity and citizenship. Cultural Routes combine tangible and intangible heritage, illustrating and celebrating the exchanges, cultures and traditions that have shaped Europe over the millennia. Cultural Routes are instrumental in the European context, by promoting common European identity, deploying heritage

and traversing borders for **cultural tourism**. In a very recent development (November 2021) the United Nations World Tourism Organization (UNWTO) and the Council of Europe work together to develop the opportunities tourism offers to local communities and to enhance the tourist experience along the European region's Cultural Routes. The joint actions are aimed at recognizing the added value that Cultural Routes offer for sustainable tourism development, cultural heritage safeguarding and intercultural dialogue. The collaboration also further highlights the Cultural Routes' potential for advancing social, economic and cultural development, benefitting both Europe and its partner countries by strengthening cultural and historical ties.

- **Creative Tourism** is a new generation of cultural tourism whereby the tourists themselves and the locals are involved in the co-creation of the tourist products. The Creative Tourism concept is defined by the Creative Tourism Network as: "Tourism which offers visitors the opportunity to develop their creative potential through active participation in courses, cultural and learning experiences, which are characteristic of their holiday destination." This new way of discovering a foreign culture by experiencing it has been growing for the last decade. Nowadays, tourists no longer want to attend traditional sightseeing tours, they need to feel involved into the destination's daily life and to co-create signature experiences with the locals. This requires managing the tourism sector in a more creative way, which implies to overcome these new challenges by converting them into new opportunities and creating a value chain for tourist destinations.
- Exploiting synergies between **Cultural and Creative Industries** and sustainable tourism can enhance the visibility and promotion of tourist destinations and cultural attractions, including new employment opportunities particularly for youth and in digital tools and cultural tourism products. **Cultural and Creative Industries (CCIs)** refer to cultural heritage, design, crafts, digital products, performing and visual arts, film, video, music, TV and radio, festivals, advertising, architecture, fashion, archives and libraries, audio-visual, multimedia, publishing, museums and galleries, R&D, software, toys and games, video games and high-end products (which rely on a strong cultural and creative input such as design and manufacturing of fashion materials and goods and their distribution, in particular high-end fashion, jewelry and watches, accessories, leather goods, perfumes and cosmetics, furniture and household appliances, cars, boats, as well as gastronomy, hotels and leisure). CCIs offer many experiences the cultural and creative tourists are eager to live when they travel.

- Involving **intangible heritage, industrial heritage, heritage interpretation and innovations** leads to new sustainable cultural tourism products and services that enhance the visitor experience and the cultural tourist destinations. **Intangible cultural heritage** is the practices, expressions, knowledge and skills that communities, groups and sometimes individuals recognise as part of their cultural heritage. Also called living cultural heritage, it is usually expressed in one of the following forms: oral traditions; performing arts; social practices, rituals and festive events; knowledge and practices concerning nature and the universe; and traditional craftsmanship. They are forms of culture that can be recorded but cannot be touched or stored in physical form, like in a museum. **Industrial Heritage** consists of the remains of industrial culture which are of historical, technological, social, architectural or scientific value. These remains consist of buildings and machinery, workshops, mills and factories, mines and sites for processing and refining, warehouses and stores, places where energy is generated, transmitted and used, and transport and all its infrastructure. Industrial heritage is the subject matter of the scientific discipline called industrial archaeology; an interdisciplinary method of studying all the evidence, material and immaterial, of documents, artifacts, stratigraphy and structures, human settlements and natural and urban landscapes, created for or by industrial processes. **Heritage interpretation** is primarily a communication process that helps people make sense of and understand more about a site, collection or event. It is a structured approach to communicating significant ideas about a place to visitors, with enhancing cultural tourism experience. Interpretation establishes a link between visitors and what they can discover at heritage sites such as a nature reserve, a historic site or a museum. Interpretation facilities range from a brochure to audio-visual materials, from signing to visitor information centres, from multi-media to mobile apps in a form of storytelling. Interpretation enhances the visitor experience, resulting in longer stays and repeat visits. This leads to increased income and creates employment opportunities. **Innovation and Digitisation** turns cultural resources into an important building block for the digital economy and provides jobs and has great potential for stimulating innovation in other sectors, with a competitive edge. The digitisation and online accessibility of cultural resources as input for added-value products and services can fuel innovation in tourism. It gives Europe's rich cultural heritage a clear profile on the Internet, promotes regions and protects cultural diversity. Making the collections of cultural heritage available online is a win-win for culture, economic growth and individual fulfillment; it lends much greater visibility, attracts new visitors, tourists and researchers, as well as business to regional economies.

**Sustainable Cultural Tourism** is the subject of two important initiatives since 2014, viz:

- The annual Awards '**Destination of Sustainable Cultural Tourism**' by European Cultural Tourism Network (ECTN), since 2018 European Year of Cultural Heritage in partnership with Europa Nostra, European Travel Commission and NECSTouR, supported by Cultural Routes (Phoenicians, Iter Vitis, Via Francigena) and members of the European Heritage Alliance 3.3 (European Association of Archaeologists, Interpret Europe – European Association of Heritage Interpretation, European Federation of Museum and Tourist Railways, European Federation of Associations of Industrial and Technical Heritage), as well as the Creative Tourism Network.
- The '**Charter for Sustainable Cultural Tourism**', by ECTN, is a statement of principles on regional policies and strategies which guide the development, planning, management, operations and promotion of cultural and heritage tourism in the European Union and beyond, for the benefit of destinations, communities, businesses, citizens and visitors. The purpose of this Charter is to bring together in a single, comprehensive and integrated document the main principles, features, findings, conclusions and recommendations on good practices regarding 'Culture & Heritage Added-value to Regional policies for Tourism Sustainability'. The Charter aims to build on all relevant previous initiatives, declarations, resolutions, opinions, and charters, to exploit synergies and facilitate implementation of the recommendations by the national, regional, and local destinations authorities responsible. The overall aim is to encourage sustainable and responsible tourism policies and actions across Europe and beyond, through engaging **culture and heritage** with innovation and cohesion.



Finally, major developments in research and innovation actions regarding advances in Sustainable Cultural Tourism have been by several projects in the EU Horizon 2020 Programme (projects SPOT, SmartCulTour, IMPACTOUR, Be.CULTOUR, TExTOUR). The results of these projects have been presented at several conferences, including a joint conference in Brussels in June 2023, with the participation of RelnHerit partner ECTN, as well as at the ECTN annual conference held in Pafos 2023 European Capital of Smart Tourism, Cyprus, in October 2023, in the framework of the RelnHerit CSA.

## 5.5 Smart Tourism

*By Manos Vougioukas*

Smart Tourism involves digitalisation, technology and data-driven smart solutions to enhance the overall tourism experience for visitors. The goal is to create more efficient, sustainable, and personalized travel experiences through the integration of various technologies. Key aspects of smart tourism include cultural heritage preservation and promotion, by using technology to digitally preserve and showcase the cultural heritage of a tourist destination, such as digitalisation of museums, heritage sites, and interactive exhibits.

Other relevant aspects of Smart Tourism include inter-alia:

- Digital Connectivity: Providing tourists with access to high-speed internet and mobile networks is essential for seamless communication and access to online resources during their travels.
- Mobile Apps: Developing dedicated mobile applications that offer tourists information about attractions, maps, navigation, real-time updates, and personalised recommendations based on their preferences.
- Data Analytics: Collecting and analysing data from various sources, such as social media, sensors, and booking platforms, to understand tourist behaviour, preferences, and trends. This information can be used to optimise services and marketing strategies.
- Augmented Reality (AR) and Virtual Reality (VR): Offering immersive experiences to tourists through AR and VR technologies, allowing them to explore historical sites, cultural landmarks, and attractions virtually before, during and after their visit.
- Sustainability: Incorporating sustainable practices into tourism operations, such as energy-efficiency, waste reduction, and sustainable mobility options, to minimise the impact on the environment and mitigate climate change.
- IoT (Internet of Things): Integrating IoT devices and sensors within a destination to gather real-time data on crowd density, environmental conditions, energy

consumption, and more. This data can inform decision-making and enhance visitor experiences.

- Smart Mobility: Implementing efficient and sustainable mobility solutions, such as real-time public transport information, demand responsive transit services, and electric vehicle charging stations, to facilitate mobility and accessibility within the destination.
- Personalization: Using data analytics and AI to provide personalized recommendations for cultural activities, accommodation, and dining options based on a visitor's interests and preferences.
- Collaborative Platforms: Creating platforms that facilitate communication and collaboration among tourists, locals, services, museums and heritage sites, allowing for the exchange of information, reviews, and recommendations.
- Smart and integrated ticketing to cultural venues, museums and heritage sites, possibly combined with public transport and micro-mobility services (such as communal bikes and electric scooters).
- Real-Time Updates: Providing real-time updates on weather conditions, local events, traffic congestion, and other relevant information to help tourists make informed decisions.

Overall, smart tourism aims to enhance the visitor experience, assist local economies, and promote sustainable practices within the tourism industry by leveraging technological advancements and data-driven insights.

Smart Tourism facilitates, promotes and enhances Cultural Tourism in particular. Smart Tourism and Cultural Tourism are two interconnected concepts that can work together to enhance the overall visitors' experiences and promote the appreciation of a destination's cultural heritage with sustainability. Incorporating smart tourism practices into cultural tourism can enhance the overall visitor experience, foster a deeper appreciation for cultural heritage, and support the sustainable development of tourist destinations. By using technology to bridge the gap between modernity and tradition, destinations can attract a diverse range of visitors while preserving and promoting their cultural heritage assets and identity.

'Smart Tourism' is defined by the European Commission as follows:

*"Smart tourism responds to new challenges and demands in a fast-changing sector, including the evolution of digital tools, products and services; equal opportunity and access for all visitors; sustainable development of the local area; and support to creative industries, local talent and heritage".<sup>22</sup>*

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<sup>22</sup> [https://smart-tourism-capital.ec.europa.eu/about/european-capital-smart-tourism\\_en](https://smart-tourism-capital.ec.europa.eu/about/european-capital-smart-tourism_en)

## European Capital of Smart Tourism – EU initiative



Smart Tourism is the subject of an initiative by the European Union, namely the 'European Capital of Smart Tourism' initiative, financed under the EU COSME Programme since 2021. It is built on the successful experience of the Preparatory Action proposed by the European Parliament and implemented by the European Commission since 2019. Due to the outbreak of the COVID-19 pandemic the 2021 edition of the competition was suspended. The initiative seeks to strengthen tourism-generated innovative development in European cities and their surroundings, increase their attractiveness, and foster economic growth and job creation. It also aims to establish a framework for the exchange of best practices between cities participating in the competition, creating opportunities for cooperation and new partnerships.

The 2024 European Capital of Smart Tourism is the fifth edition of the competition. Pafos and Seville were the winners of the 2023 European Capital of Smart Tourism competition. Previous winners include Bordeaux and València (2022), Gothenburg and Málaga (2020), Helsinki and Lyon (2019).

The new 'European Capital of Smart Tourism Award' by the European Commission since 2019 has components of 'Sustainability, Accessibility, Digitalisation, Cultural Heritage & Creativity', viz:

- Accessibility includes services that are multilingual and digitally available to all travellers and visitors, regardless of their age, cultural background or their physical disability.
- Sustainability does not only mean to manage and protect natural resources, but to reduce seasonality impacts on the environment and to involve the local community.
- Digitalisation uses digital technologies to enhance all aspects of the tourism experience, enabling simpler access to services for all travellers, as well as to help local businesses to grow.
- Cultural Heritage and Creativity refers to protecting and capitalising on the cultural heritage as well as local potential and its creative assets for the benefit of the tourism destination, the industry and the visiting tourists in general.

Smart Tourism is thus closely related to the preservation and promotion of cultural heritage with digitalisation in sustainable cultural tourism development and promotion.



The aim of the Smart Tourism Capital awards is to promote innovation to strengthen smart destinations in Europe, to enhance tourism offers for visitors and to facilitate new partnerships, networking and the exchange of best practice. It also aims to foster the EU's forward-thinking tourism offer to global audiences and sustainably increase attraction to pioneering destinations that offer unique visitor experiences.

In terms of Cultural Heritage and Creativity, the following aspects are highly relevant:

- making resourceful use of cultural heritage and creative industries to enrich tourism experience and quality of life
- actions implementing to boost the recognition as a smart tourism destination and to incorporate the tangible and intangible heritage of art, history and culture, in an enhanced tourism offer
- use cultural heritage and creativity to attract tourists, as well as exploit synergies between tourism and cultural and creative industries.

In terms of Digitalisation, the following principles apply:

- offering innovative tourism and hospitality information, products, services, spaces and experiences adapted to the needs of the consumers through ICT-based solutions and digital tools.
- providing digital information about destinations, their attractions and tourism offers
- information on public transport, attractions and accommodation digitally accessible, or even integrated
- a digital-friendly environment for businesses to grow in
- supporting tourism businesses in the development and use of digital skills and tools
- using digital solutions for enhancing innovative tourism offers.

In terms of Sustainability, including Environmental, Social and Economic aspects:

- working to preserve and enhance the natural environment and resources and balancing economic and socio-cultural development
- managing natural resources (including innovative environmentally-friendly measures)
- implementing resource efficiency measures and actions aimed at combating, or adapting to, climate change
- putting in place measures aimed at reducing tourism seasonality
- involving the local community, share revenues with local communities, local tourism revenues channeled into local development, communities and businesses
- contribute to local employment
- support businesses and local communities to develop sustainable solutions or collaborations for the tourism industry.

In terms of Accessibility:

- physically accessible to travellers with special access needs, regardless of age, their social or economic situation and whether they have disabilities or not
- easily reachable by different means of transport and with a strong network by car, train, plane, and bike
- tourism services accessible to all
- barrier-free for people in a wheelchair, with mobility challenges, families, aged visitors
- restaurants, museums, walking tours information available in multiple languages, multilingual service-staff
- street guidance routing for blind people, accessible tourism services for people with mental disabilities, people hard of hearing, parents with young children, the elderly, etc
- services, activities, exhibitions and attractions allowing everyone to participate, regardless of disabilities.
- accessible booking systems, websites and services offering multilingual information,
- websites/apps user-friendly and intuitive.

The ReInHerit Horizon 2020 CSA partner ECTN presidency Pafos, Cyprus (2021-2024), has won the title of 'European Capital of Smart Tourism 2023' (together with Seville, Spain) amongst 29 candidates and 7 finalists.

## Pafos 2023 European Capital of Smart Tourism

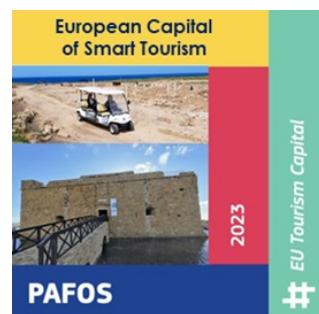
The capital of Cyprus in Roman times, Pafos is an all-year-round destination and one of the most diverse and historically rich areas on the island. Pafos was European Capital of Culture in 2017 and is European Capital of Smart Tourism in 2023.

### Transforming quantity into quality with innovation and creativity

Pafos is one of the most popular tourist destinations in Cyprus and it attracts most of the visitors coming to the island. The whole city is included in the UNESCO world heritage list and people can discover important places of interest, such as the UNESCO Archaeological Park of Kato Pafos, the Medieval Castle by the ancient harbour, the Old Town, among others. This rich area attracts over 550,000 international visitors with an average duration of stay of 8 days, has the capacity of 12,000 license tourist beds and it is estimated that the tourism industry within the city of Pafos employs around 14,000 people. The city is currently investing heavily in the region's infrastructures, tourist products, services and experiences offered, tourism technology and environmental protection. Pafos has transformed from a traditional mass sun-and-sea tourism hotspot into a modern and innovative tourism destination.

### Where myth meets technology

Pafos is at the heart of the myth of Aphrodite, with the beach of her birthplace. The city then offers a new experience to visitors with the possibility – coming soon – to download the Myth of Aphrodite app for free, after the success of the pilot project using AR (Augmented Reality). Users will be able to scan relevant photos of Aphrodite in three different places on the beach, to enjoy Aphrodite in a real environment through their smart devices. The scenes include the mythical goddess emerging from the foam of the sea, sitting on a rock, and reading a book on the beach. Users can then interact, and find information on the app, with locations and description. Culture lovers or explorers, all can download the app and enjoy it.



## 5.6 Smart Destinations UNWTO

By Manos Vougioukas

Smart destinations play a significant role in enhancing cultural tourism experiences. Cultural tourism involves travellers seeking immersive experiences that allow them to explore and engage with the cultural heritage, traditions, arts, and history of a destination. The integration of smart technologies and approaches into cultural tourism can greatly enrich these experiences.

The concept of 'Smart Destinations' is closely associated with the work of the United Nations World Tourism Organization (UNWTO). The UNWTO defines a smart destination as one that "makes the most of technology to improve the quality of the visitor experience, improve the quality of life for residents and make efficient use of resources." This concept aligns with the broader idea of Smart Tourism, focusing on using technology and innovation to enhance the overall tourism experience and destination management.

The UNWTO (since 2024 UN Tourism) emphasizes several key principles when it comes to smart destinations:

- Collaboration: Smart destinations foster collaboration among various stakeholders, including governments, businesses, local communities, and tourists, to create a cohesive and effective tourism ecosystem. This also refers to closer collaboration between museums and heritage sites.
- Innovation: Smart destinations encourage the adoption of innovative technologies and approaches to enhance the tourism experience, sustainability, and competitiveness of the destination.
- Technology Integration: These destinations leverage information and communication technologies (ICTs) to provide real-time information, enhance communication with visitors, and streamline various aspects of the tourist experience.
- Sustainability: Smart destinations prioritize sustainability by using technology to manage resources more efficiently, reduce environmental impact, and promote responsible tourism practices.
- Accessibility: Technology is employed to make destinations more accessible and inclusive for all types of travellers, including those with disabilities.
- Local Engagement: Smart destinations involve and engage local host communities in the development and management of inclusive tourism initiatives, ensuring that the benefits of tourism are distributed widely.

- Quality of Life: The goal of smart destinations is not only to improve the tourism experience but also to enhance the quality of life for local residents by creating a more sustainable and liveable environment.
- Resilience: By using technology and data, smart destinations can better prepare for and respond to crises, such as natural disasters or public health emergencies.

The UNWTO provides guidelines and resources for destinations looking to embrace smart tourism practices. These guidelines cover topics such as governance, innovation, technology infrastructure, data management, and stakeholder engagement.

Overall, the concept of smart destinations, as advocated by the UNWTO, underscores the importance of using technology as a tool to enhance the sustainability, competitiveness, and overall appeal of tourist destinations while also benefiting local communities and preserving cultural and natural heritage.

The 'Smart Destinations' initiative of UNWTO is closely related to the next generation of cultural tourism development and promotion. A smart destination according to the UNWTO is one with a strategy for technology, innovation, sustainability, accessibility and inclusivity along the entire tourism cycle: before, during and after the trip. A smart destination is also one with residents as well as tourists in mind, factoring multilingualism, cultural idiosyncrasies, and seasonality into tourism planning. Smart Destinations are key to the transformation of the tourism sector; by continuously and accurately measuring, integrating and analysing data for efficient decision-making, prioritization and anticipation of challenges, they create a seamless and exciting experience for tourists while managing local resources efficiently, including cultural assets. Smart destinations deploy digital applications that make it possible to offer increasingly customized services and to differentiate cultural tourist destinations that provide added value while preserving the natural, social and cultural environment. Smart destinations can make tourism governance more inclusive through inclusive entities, such as boards, trusts or foundations, which represent all public/private stakeholders in the destination. They can help ensure maximum accessibility in sites, products and services, eliminating barriers to mobility.

Smart Destinations is a new tourism model based on Innovation, Technology, Sustainability and Accessibility. Innovation and technology have led to changes in the tourist profile (highly informed, multichannel, independent). In the digital age, cultural tourists expect personalised services, they need to be online almost at all times, and they demand authentic experiences, destinations which can offer tourists something new and distinctive, in keeping with the natural, social and cultural environment. This means that tourist destination authorities must evolve to meet the requirements of these new tourists at every stage of their trip. A destination that can innovate, implementing new systems that facilitate the analysis of

multiple sources of information (Big Data, Business Intelligence) and enable them to be more efficient and competitive. Thus, a complete overhaul, which does not repeat or rehash old patterns, is needed in tourist destinations. The end goal is to ensure the destination is sustainable in the long term, economically, socio-culturally and environmentally. In this ever-changing context, where new proposals appear every day all over the world, it is essential to examine these new models in depth towards enhancing the visitor experience, particularly in sustainable and smart cultural tourism.

Smart destinations implement and increase the use of technology that connects different physical elements, services and spaces, such as museums and cultural heritage sites, and that facilitates the analysis of the resulting data. As this can improve the management of these elements in real time, among others, big data analysis, the Internet of Things (IoT), open data strategies are fundamental elements for transitioning to more intelligent tourist destinations.

When developing smart destination systems, objectives, strategies and action plans shall aim at supporting the destination's sustainable development, reflecting different contextual elements such as available resources; residents' and visitors' needs; the destination's specific socio-cultural / environmental context; its current challenges and needs, etc. Because not all existing challenges can be overcome at once, prioritization is essential when implementing smart solutions. For such purpose-driven development, and in order to create feasible action plans for the destinations, it is of high importance that efforts are made to create a detailed analysis, at the beginning of the planning process, which clearly identifies and reflects the local characteristics, the main challenges and needs, the prevailing regulatory framework, necessary interventions and other essential aspects. Throughout the process, data visualization is crucial for a transparent and understandable interaction with the host and guest.

With cultural tourism playing an important part in many urban or rural communities, the successful planning of smart destinations depends very much on its integration within these environments. Consequently, meaningful partnerships between individual or specific groups of actors are key for the successful transition towards smart destinations, not only in respect to developing and implementing new solutions but also to ensuring continuity. This includes not only partnerships between and within the private and public sectors, between data providers and recipients, but also with other stakeholders such as the local communities, museums and heritage sites.

It is essential for cultural tourism stakeholders involved in developing smart destinations to form and be represented through inclusive entities, such as foundations, tourist boards and associations; it is of similarly high importance to seek close cooperation and connections to

cultural organisations, museums and heritage sites, that are also aiming to create smart solutions for enhancing the visitor experience.

Smart solutions enable destinations to better respond to changing travel behaviours and needs of the more informed, hyper-connected and multi-channelled cultural tourist by offering more relevant, integrated services (e.g., from door to door) and incorporating fast adaptation processes in individual business models as well as in destinations themselves. In this respect, cultural tourism particularly benefits from better cooperation between museums and heritage sites in enhancing the visitor experience through smart solutions.

The digital environment allows companies to promote cultural destinations, products and services more successfully than ever, creating higher value through, for example, better market segmentation, personalization of products and services, and more transparent and immediate communication with visitors at museums and heritage sites. Therefore, destinations are more equipped to actively steer and respond to their visitors' needs, increasing their satisfaction and the overall competitiveness and quality of the destination. Smart solutions are only intelligent if they improve sustainability. While advances in data management have been made predominantly in the economic area of sustainability in the past, the new digital transformation of the sector offers opportunities to strengthen a more universal approach towards sustainability, supporting stakeholders at all levels to profit from decision making mechanisms based on tangible evidence in all three pillars of sustainability, allowing destinations to govern their tourism activity more effectively. It is also important to foster smart solutions that integrate knowledge from different sources and drive circular design of products and services for higher resource productivity, strengthening the sustainable management of cultural resources overall.

New technological solutions for smart destinations should be based on, and should preserve and promote, local identities and values, destinations' successful governance is highly dependent on continuous participatory processes involving all stakeholders, public and private, across all levels. In order to strengthen participatory policy-making, local authorities shall therefore make increasing use of tools such as participatory budgets that ensure long-term participation of local host communities. Within the social dimension of sustainability, new technologies and smart systems shall be encouraged that serve to improve accessibility for people with handicaps, ensuring that destinations and trips to cultural assets, museums and heritage sites are barrier-free and accessible for all.



## 5.7 Transition Pathway for Tourism

By Manos Vougioukas

The 'Transition Pathway for Tourism'<sup>23</sup> (TPT) launched in 2022 by the European Commission describes the measures and outputs needed to accelerate the green and digital transitions and improve the resilience of the tourism ecosystem. The objective is to encourage and invite all groups and stakeholders in the tourism ecosystem to engage and play their part in the initiative. The preparation of the TPT has followed a collaborative approach involving all stakeholder groups. Similar active and productive collaboration supports the way forward. Following the publication of this report, the European Commission has invited tourism stakeholders to present their relevant commitments and is establishing collaboration processes for the co-implementation and monitoring process (with 2030 as a target year). The follow-up of the transition pathway is to be facilitated by an online stakeholder collaboration platform.



The TPT includes several references in relation to cultural heritage and sustainable cultural tourism, viz:

- cultural heritage and the potential to give customers unique and authentic experiences
- cultural and creative industries in their key role in the tourism ecosystem
- innovative tourism based on cultural heritage, traditions, arts and authentic cultural experiences
- cultural and active tourism experiences for visitors

<sup>23</sup> European Commission, Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, Transition pathway for tourism, 2022, <https://data.europa.eu/doi/10.2873/344425>

- virtual and augmented reality services provide new ways to help preserve natural and cultural resources at risk, while enabling real-like visitor experiences
- linking with the objectives of European data space for cultural heritage to digitise cultural heritage assets, R&I in this area could provide new innovative, sustainable and accessible forms of tourism services
- innovative tourism services using advanced technologies (virtual reality, augmented reality, AI) and digitized cultural heritage
- use of cultural centres such as museums, theatres, libraries and archaeological sites, together with the integration of European and regional tourism policies
- UNESCO sites, archaeological, marine and natural parks, villages and spa tourism, will be fundamental to increase the attractiveness of tourism
- develop and implement smart and sustainable tourism strategies at the right level in order to emphasise local identity specialities by encouraging the promotion and quality craftsmanship, especially for regions that highlight their gastronomy, local knowledge and traditions
- establishing collaborative and data-supported destination management models
- developing comprehensive strategies taking account of economic, environmental and social sustainability of tourism.

These aspects of the TPT co-implementation process till 2030 are highly relevant synergies for the development and promotion of sustainable cultural tourism in Europe, based on cultural heritage and digitalisation.

There are specific references to:

**- Smart and sustainable tourism strategies**

Stakeholders confirmed that the green and digital transition to achieve greater resilience in tourism at national and regional levels should be guided by comprehensive tourism strategies. These strategies should be built on sustainable development principles, which factor in economic, environmental and social sustainability. It also requires effective and collaborative governance that takes into account inputs from and the views of all stakeholder groups.

Tourism strategies should pay close attention to:

- implementing the above regulations (in terms of their environmental objectives, digitalisation, data collection and monitoring)

- tackling the specific challenges of tourism destinations (climate mitigation and adaptation needs<sup>63</sup>, infrastructure needed to improve sustainability, pressures on biodiversity, water resources or pollution)
- specific strengths of tourist destinations in terms of natural resources, cultural heritage and the potential to give customers unique and authentic experiences
- Inclusiveness and accessibility, including for persons with disabilities
- Supporting SMEs and cultural and creative industries in their key role in the tourism ecosystem, in terms of technical assistance and the funding needed to meet the objectives of the strategy.

Depending on the tourism management setup in the Member States and regions, the bodies in charge of developing tourism strategies may be national, regional or local level bodies. In cross-border areas, such as in coastal communities, it could be beneficial to develop a comprehensive strategy at a sea basin or at a macro-regional level, aligned with the existing initiatives, which would support the coordination and collaboration of stakeholders across borders. It could be appropriate for EU regions such as the outermost regions<sup>64</sup> to develop such cooperation for sustainable tourism strategies together with third countries and territories in their direct geographic proximity. Smart specialisation strategies<sup>65</sup> can also be helpful in developing smart and sustainable tourism.

#### **- Collaborative governance of tourist destinations**

To make the national or regional tourism strategies specific and usable, they need to be complemented with locally developed and adapted work plans. Depending on the local destination, the responsibility for developing or managing work plans may lie with the local authority or destination management organisation (DMO). As the skills and resources of both are needed to support tourism stakeholders in their work, the best solution would be to ensure that they jointly prepare and follow up the local tourism strategy and work plan. The stakeholder consultation highlighted that collaboration between all stakeholders is important to ensure sustainable tourism that generates positive net effects for the visited communities around the tourism destination. This should include public and private-sector organisations, local producers and services, cultural and creative sectors and industries, local authorities, tourism management organisations and local associations and residents. Visitors should also be able to provide their input, which could help improve the visitor experience while factoring in the needs and interests of the visited community. This collaborative work should support local public spaces and services, tourism marketing and services design, and monitoring mechanisms of the impact of tourism locally. Some of the best practices collected in the European Capital of Smart Tourism competitions take the collaborative and inclusive governance approach, where destination management organizations take on strategic tasks,

and the local community and authorities are involved in the decision-making process. These are good example practices for other destination management organisations to follow across the EU.

## 5.8 Make it Your Own

As has been shown in this chapter, sustainable and smart tourism is an essential element to value the cultural heritage of the territories as well as a field in which digitalization and communication must be in tune with the tourist and cultural needs of the regions. In the following table we present some ideas to comment on.

START	STOP	CHECK		
		We have followed it and can help others	We work at it to adapt	No, we should get to work
We have established channels of communication and collaboration with some of the stakeholders in the territory to create synergies	<ul style="list-style-type: none"> <li>● Do we have a well-established network of contacts in the territory with stakeholders from various sectors?</li> <li>● Do we have signed agreements between our institution and stakeholders that help us in the technology, sustainability and communication sectors?</li> <li>● Do we have mechanisms for listening and dialogue with local communities for the establishment of tourism actions?</li> </ul>			
We have mechanisms in place to be competitive within a Smart Destination	<ul style="list-style-type: none"> <li>● Is there an action plan that we follow for short-term action for the implementation of initiatives that help the territory towards Smart Tourism?</li> <li>● Is there an action plan that takes into account museums, buffer zones and CH where digital transformation is included?</li> </ul>			

START	STOP	CHECK		
		We have followed it and can help others	We work at it to adapt	No, we should get to work
We have established channels of communication and collaboration with some of the stakeholders in the territory to create synergies	• Do we have a well-established network of contacts in the territory with stakeholders from various sectors?			
	• Do we have signed agreements between our institution and stakeholders that help us in the technology, sustainability and communication sectors?			
	• Do we have mechanisms for listening and dialogue with local communities for the establishment of tourism actions?			
	• Are there initiatives that include digital measures in place and indicators to measure them on environmental, social and cultural issues?			
Are our communication strategies oriented towards the dissemination of sustainable values and in line with an ethical approach to cultural tourism?	• Is our digital and traditional media communication strategy planned to be a collaborative strategy among various stakeholders?			
	• The public associates our territory brand values with sustainability to sustainability and heritage care?			
	• Do we have communication campaigns focused on local and tourist audiences to raise awareness of the positive and negative effects of tourism?			



6

EPILOGUE

## 6 Epilogue

### 6.1 EU cultural heritage sector's collaboration and communication forward-looking approach. The contribution of the RelnHerit project

By Jaime Lopez

Within the scope of cultural heritage collaboration and communication, the European Union (EU) has maintained an active and dedicated role through the years. With a keen recognition of the vital importance of preserving and promoting cultural heritage to enhance social cohesion, stimulate economic development, and celebrate cultural diversity, the EU has formulated an array of policies, programs, and initiatives. These measures are expressly designed to promote and provide support for cultural heritage management activities among its member states.

To grow in the European cultural heritage sector, it is essential to navigate a spectrum of collaborative challenges spanning political, economic, social and cultural dimensions. In this sense, the EU delves into crucial factors to take into account within each of these areas:

Political:

- EU policies and funding opportunities for cultural heritage
- EU Member States' policy collaboration on cultural heritage through the Council of Ministers for Education, Youth, Culture & Sport<sup>24</sup>, and through the Open Method of Coordination<sup>25</sup>

Economic:

- The potential of cultural and creative sectors to contribute to economic growth, employment, and social cohesion

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<sup>24</sup> <https://www.consilium.europa.eu/en/council-eu/configurations/eycs/>

<sup>25</sup> <https://www.europarl.europa.eu/EPERS/EPRS-AaG-542142-Open-Method-of-Coordination-FINAL.pdf>

- The New European Agenda for Culture's<sup>26</sup> objectives to support culture-based creativity in education and innovation, promote culture as an engine for sustainable social and economic development, and reinforce cooperation on cultural heritage

Social:

- The role of cultural heritage in creating and enhancing Europe's social capital
- The importance of participatory governance of cultural heritage and increased participation of citizens in museums and other cultural institutions to increase social cohesion and cultural pluralism

Cultural:

- Protecting and promoting Europe's cultural heritage as a shared resource, raising awareness of our common history and values, and reinforcing a sense of common European identity
- Reinforcing cooperation on cultural heritage beyond EU boundaries
- Using cultural and natural heritage for promoting sustainable development

To help achieve these collaborative challenges, the European Union has already launched some ambitious programs that will undoubtedly foster cooperation and communication between professionals in the cultural heritage sector in the coming years.

One of these programs is the European Collaborative Cloud for Cultural Heritage (ECCCH), that is an European Commission initiative (launched through 2 Work Program Calls from 2023-2025), that will be a one-of-a-kind framework to enable unparalleled transdisciplinary and large-scale collaboration between cultural heritage professionals on shared topics, and to enhance their ability to interact across disciplinary, institutional, and national boundaries. The Cloud targets museums and professionals in cultural heritage, such as GLAM institutions, scholars, students, and creative industries. It fosters exchanges between museums, helps identify new challenges and potential areas of further development of the system, and grants accessibility to cultural heritage through new technologies.

It is also worth mentioning the Work Plan for Culture, adopted by the Council of Culture Ministers of the EU, that will act as a strategic instrument of EU cultural cooperation, aligning with current political dynamics while upholding EU principles of subsidiarity and

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<sup>26</sup> In 2018, the European Commission introduced the New European Agenda for Culture, which reflects the dynamic evolution of the cultural sector. This agenda, alongside its accompanying Staff Working Document, establishes a collaborative framework for cultural matters at the European Union (EU) level. The core emphasis is placed on acknowledging culture's significant positive impact on European society, the economy, and international relations. The Agenda further outlines improved approaches to collaboration with Member States, civil society organizations, and global partners. <https://culture.ec.europa.eu/document/a-new-european-agenda-for-culture-swd2018-267-final>

proportionality. The 2023-2026 Work Plan outlines four core priorities: empowering cultural and creative sectors, enhancing cultural participation and societal contributions, harnessing culture for environmental sustainability, and strengthening the cultural dimension of EU external relations through collaborative partnerships. It serves as a comprehensive guide for policymakers, cultural practitioners, and stakeholders, promoting effective cultural cooperation and addressing pressing challenges within the European Union.

The ReInHerit Project has also contributed by providing policy recommendations<sup>27</sup> for creating a sustainable digital cultural heritage ecosystem through a sustainable model of heritage management based on digital collaboration and communication between all stakeholders. These recommendations are organized into four key themes:

Collaboration: enabler of sustainable cultural heritage management.

- Strengthen creative digital partnerships with research institutions, the public and private sectors, and policymakers.
- Create digital platforms to facilitate collaborations among museums and heritage sites professionals.

Digital Infrastructure: tangible methods for facilitating the digital transformation of small and medium-sized museums.

- Develop sustainable digital collaborations, ensure cooperation between technical experts and ICT content developers
- Establish digital platforms for collaboration, including training for digital skills.

Finding Relevance: connecting with local and global communities.

- Develop impact tools for measuring relevance, promote digital upskilling, and foster relationships with local communities.
- Enhance public awareness through various media platforms and engage diverse audiences.

Impact of COVID-19: recognize the profound impact of the pandemic on the cultural heritage sector.

- Using digital infrastructures and communication tools to promote the relationship between cultural heritage and health/wellbeing through arts interventions and hybrid models for experiencing cultural heritage.

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<sup>27</sup> Hadjicosti, I., Nikolaou, P., & Asimenou, M. (2022). "D7.4 CH Sustainable Management Guidelines 1st PolicyBrief". [www.reinherit.eu](http://www.reinherit.eu)

Furthermore, the ReInHerit project, through its digital hub, will play a vital role in their future contribution to the communication and collaboration between museums, cultural heritage sites, and the cultural tourism sector. It will provide a central platform for users to share resources, ideas, and best practices. The platform will help to raise awareness of the importance of European cultural heritage and its role in contemporary society.

The digital hub will also support the other communication channels of the ReInHerit project. For example, users will be able to share their content on social media or embed it in their own websites, and the forum can be used to discuss current issues about cultural heritage management.

Heritage professionals will be able to use the digital hub to share their expertise and collaborate on projects. For example, museum curators in one country could use the digital hub to connect with other curators in another country who is working on a similar project. Policy makers can use the digital hub to learn about the latest research on cultural heritage and to connect with heritage professionals and other stakeholders. Researchers can use the digital hub to share their findings with a wider audience and to connect with other researchers who are working on similar topics. Target audiences can use the digital hub to learn about European cultural heritage, to connect with heritage professionals and other stakeholders, and to share their own experiences and perspectives.

Overall, the ReInHerit digital hub will be a valuable tool for communication and collaboration between all stakeholders in the European cultural heritage sector. It will help to break down barriers and foster a more inclusive and collaborative approach to cultural heritage management.

On the other hand, the future of the European cultural heritage sector's collaboration and communication lies at the intersection of tradition and innovation. As we navigate the evolving landscape of heritage preservation and visitor engagement, it becomes increasingly clear that embracing digital tools, fostering interdisciplinary partnerships, and engaging with diverse audiences are the cornerstones of progress in the cultural heritage sector.

## 6.2 Conclusions

Throughout the manual, various tools have been explored to reflect, improve, and enrich the internal and external communication and collaboration of organisations and institutions dedicated to the conservation and dissemination of Cultural Heritage in its multiple expressions.

Its purpose, as set out in chapter one, is to expose the complex landscape that entails undertaking and implementing communication and collaboration practices that generate synergies between sectors and territories.

As a final observation, based on the vision of the handbook, some aspects can be pointed out regarding the instrumentalisation and implementation of communication and collaboration initiatives:

- Digitization at its different scales and areas of application is a process that requires a clear vision in the technical implementation, in-depth research and knowledge of visitor habits to achieve its goal of communication commitment.
- Sustainability in all areas requires collaboration between the entire organizational framework of both heritage sites, museums and different tourism actors in the territory.
- Continuous professionalization in local institutions and organisations is the vital part of generating programs in which communication and collaboration come together.

In summary, the deployment of various tools in the three areas explored in the handbook: digitalization, sustainability, and continuous professionalization, suggests that communication and collaboration are most useful when seeking to approach and understand culture and visitors

As a conclusive support synthesis to the chapters of the manual, two schemes are presented below with measures in communication and collaboration to adopt in the roadmaps of museums, world heritage sites, and cultural tourism.

## COMMUNICATION ROUTE FOR MUSEUMS CULTURAL HERITAGE SITES AND TOURISM

### IN SEVEN POINTS

- 
- 1 **Create** and keep the public map updated as specific and characterized as possible, differentiate the types of actors, if possible, give a degree of importance to each one, define a communication objective in each case.
  - 2 **Adopt** a transversal communication mentality in the organization, that is, everyone can communicate and must have the tools to do so, communication goes beyond promotion.
  - 3 **Design** a flexible strategic communication plan, which is taken seriously from the management of the organization to all departments. It is vital that collaborative actions are considered in said strategic plan.
  - 4 **Examines** possible procedures or practices that hinder communication in three orders: communication between areas, communication between organizations or institutions, communication with visitors. Discuss them in groups and generate possible tactics to eliminate these practices.
  - 5 **Remember** that digital is already part of our daily communication, facing visitors, formulate initiatives that come close to answering the question: "how to make this visit meaningful"?
  - 6 **Maintain** continuous listening to what others are doing. In the case of digital social networks, you can adapt formats and trends. Keep the tone simple and experiment with formats.
  - 7 **Keep** in mind, communication is a transversal tool of the organization and can be useful both for internal improvement and for the recognition of attributes through the care of the branding of the museum, heritage site or tourist destination.

## COLLABORATION ROUTE FOR MUSEUMS CULTURAL HERITAGE SITES AND TOURISM

### IN SEVEN POINTS

- 
- 1 **Diagnosis** through an analysis of which of the different departments, which types of collaborative scheme could support the achievement of strategic objectives.
  - 2 **Works** on generating agreements with organizations and external agents that can contribute to building environmental sustainability and social inclusion programs.
  - 3 **Encourage** the different members of the team to create proposals for interdepartmental, academic or social actor collaboration. Trying to carry out those that can be done with the means and expertise that you already have.
  - 4 **Plan** collaborative campaigns and strategies on digital social media with different content creators (institutions or people), looking for those who share values and objectives.
  - 5 **Analyzes** the alternatives in which long-term collaborations can be created with local actors from the creative and cultural sectors of the region. Thinking about small and lasting actions.
  - 6 **Plan** activities in collaboration with local communities. The deepest value of cultural heritage lies in the people who live it and who share its identity.
  - 7 **Evaluate** the progress and completion of collaborative actions by integrating KPIs and the experience of those who direct and participate in collaborative actions. Learning through dialogue is the best way to improve future collaborations.

Establishing a robust network of partnerships and collaborations can unify and fortify the cultural heritage and the tourism sectors, providing assistance to organizations in need, amplifying community voices, expanding the reach of museums and cultural institutions, and ultimately fostering democratic and reflective practices within these institutions. The potential for growth, learning and collective impact through collaborative efforts is unlimited and holds the promise of a sustainable and dynamic future for museums and heritage sites not only in Europe but globally.



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# 7

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