



EcoHeritage

Training modules

EcoHeritage: ecomuseums as a collaborative approach to recognition, management and protection of cultural and natural heritage

Project N°: 2020-1-ES01-KA204-082769



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INDEX

Training Module 1. Heritage, Community and Territory	3
Training Module 2. Ecomuseums & Sustainability	13
Training Module 3. Planning, Starting & Sustaining the Ecomuseum	31
Training Module 4. Participation and active Citizenship. Participatory Processes	47



ECOHERITAGE: ecomuseums as a collaborative approach to recognition, management and protection of cultural and natural heritage.

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Introduction

Module's Guideline for the User

This Training Module presents a general conceptual framework for the following modules, trying to reach a common ground for concepts and theories regarding contemporary Ecomuseums. It has three units, each one focusing on specific issues regarding Heritage, Community and Territory. It starts with a historical overview of the conceptual development of ecomuseums in the 1960's, presenting practical examples to understand the socio-political and economic environment related to the emergence of new theories and experiences. The second unit concentrates on the social role of museums addressed by sociomuseological approaches. The third unit brings contemporary examples of life-oriented ecomuseums to inspire the practical approach of the following training modules.

Module's Overview

A group of sociopolitical issues nurtured the conceptual development of ecomuseums in the 1960s, observed in the changes in traditional comprehension of museums: from the traditional museum notion of "building + collections + visitors" to the ecomuseum idea of "territory + heritage + populations". The historical momentum in the 1960s has widened the understanding of heritage and museums, highlighting issues related to intangible heritage, natural heritage, community, social cohesion, sustainability and territorial development. This module starts with a historical discussion on the conceptual development of ecomuseums, addressing contemporary issues to facilitate the design and implementation of ecomuseums. The module is structured in three units, dedicated to heritage, community and territory. They will facilitate the conceptual understanding and the design of strategies for acknowledging the diversity of contexts where the ecomuseums could be developed, considering different approaches locally and connecting them to broad contexts. The concept of ecomuseums was developed during counterculture movements since the 1960s – contesting imperial museums and opening new perspectives related to local development. The roundtable of Santiago de Chile, in 1972 and the creation of the International Movement for a New Museology (MINOM) converged in the academic knowledge, resulting in recent discussions developed under the concept of sociomuseology – a school of thought present mainly in Ibero-American contexts. This module will broaden the discussion focusing on the three main pillars of ecomuseums: heritage, territory and community. The following ones will then connect the conceptual framework to practical perspectives.

Module's Aims & objectives

The aim of this module is to offer a conceptual approach to ecomuseums grounded on specific cases related to sociopolitical developments since the 1960's. It is expected that this general framework will encourage participants to develop their own projects and to share experiences in the following modules.

General Objective:

Provide participants with a general understanding of concepts relating to ecomuseums, focusing on the contemporary comprehension of heritage, community and territory.

Specific Objective 1:

Understand the historical background of the concepts of heritage and ecomuseums since the 1960's.

Specific Objective 2:

Comprehend the social dimension of ecomuseums, relating to the solving of communities' problems.

Specific Objective 3:

Recognize ecomuseums as life-oriented organizations and networks, connected to the development of territories.

Module Learning Outcomes

1. Participants outlined the historical background of ecomuseum conceptual frameworks;
2. Participants comprehended the possibilities for diverse approaches to ecomuseums based on their geographies and cultural assets;
3. Participants improved their capacities to carry out contextual analysis and cultural diagnostics for the development of practical initiatives in the following modules;
4. Participants presented a clear comprehension on ecomuseums, considering their theoretical understandings, the diversity of experiences observed in different regions and the possibilities of designing projects based on local resources and addressing sustainable development.

Learning Unit 1

Understanding Heritage: A Historical, Conceptual and Institutional Approach to EcoMuseums

This unit will present the conceptual framework of heritage and its relation with ecomuseums. What is heritage? Which typologies define heritage nowadays? How to map and identify cultural heritage locally? The unit will focus on how can an ecomuseological approach address cultural heritage, defining baselines for the development of sustainable projects and debating international normative documents guiding cultural heritage policies.

The section starts with a conceptual debate on the contemporary understanding of heritage. The ecomuseums approach to heritage is then presented, addressing issues related to community, environment and territory (Davis, 2011; Rivière, 1985; Varine, 2017; 2006; 2002). A series of international documents is introduced, linking heritage and ecomusems to international context and concepts.

The cultural heritage is part of our daily life, observed in the transmission of expressions, knowledge, and habits. From generation to generation, we have been inheriting cultural references which highlights the cultural diversity of humanity: the music played in our local festivities, the way we produce our bread, the traditional buildings contemplated in different locations, our spirituality, traditional medicine, handicraft, etc. As human beings, this heritage is related to the comprehension related to the uses of culture and to the relation established with the natural environment.

Since the 1970's, the understanding of cultural heritage has been changing: from the recognition of tangible heritage referring to monumental buildings, "brick and mortar" structures, to natural heritage, environment, landscapes and intangible heritage. The comprehension of heritage nowadays is agreed in different perspectives, observed in international consensus documents, most of them published by UNESCO. The conventions framed the heritage concepts, adopted by specific international documents: i.e. Convention Concerning the Protection of the World Cultural and Natural Heritage (UNESCO, 1972) and the Convention for the Safeguarding of the Intangible Cultural Heritage (2003).

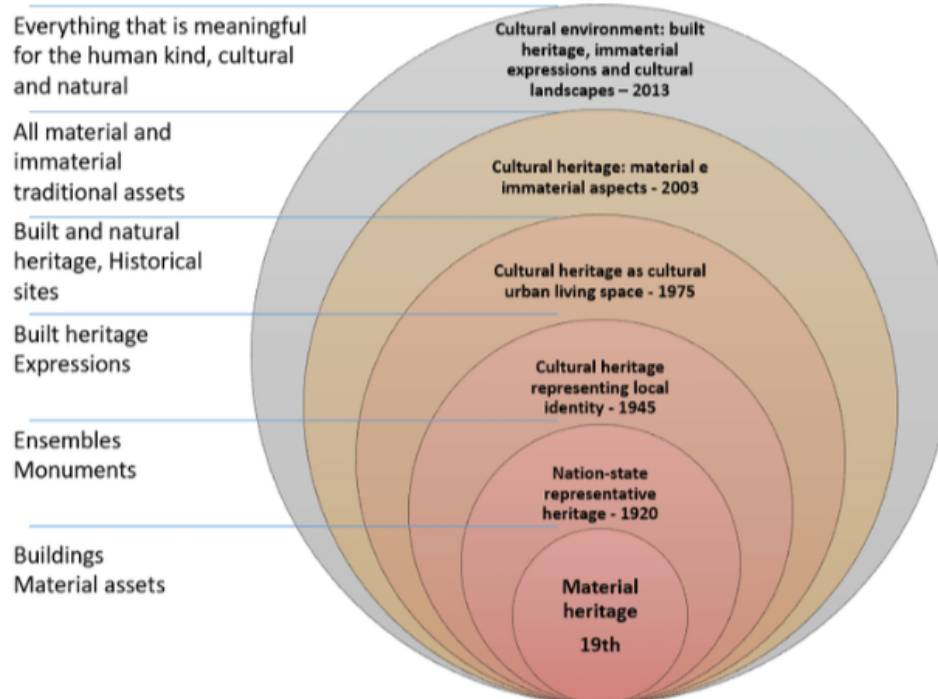
The institutions and public bodies have been trying to classify our heritage, in order to facilitate the safeguarding of the cultural references inherited from our ancestors. According to UNESCO, these are the current definitions of the three main typologies of heritage:

- **Tangible Cultural Heritage:** "(...) includes artefacts, monuments, a group of buildings and sites, museums that have a diversity of values including symbolic, historic, artistic, aesthetic, ethnological or anthropological, scientific and social significance." (UNESCO Institute for Statistics, 2009)
- **Intangible Cultural Heritage:** "(...) includes traditions or living expressions inherited from our ancestors and passed on to our descendants, such as oral traditions, performing arts, social practices, rituals, festive events, knowledge and practices concerning nature and the universe or the knowledge and skills to produce traditional crafts." (UNESCO, 2003)
- **Natural Heritage:** "refers to natural features, geological and physiographical formations and delineated areas that constitute the habitat of threatened species of animals and plants and natural sites of value from the point of view of science, conservation or natural beauty. It includes private and publically protected natural areas, zoos, aquaria and botanical gardens, natural habitat, marine ecosystems, sanctuaries, reservoirs etc." (UNESCO, 1972; UNESCO Institute for Statistics, 2009)

Museums, spaces historically dedicated to the safeguarding of cultural heritage, have also been changing in the last decades. The emergence of democratic movements was also interrelated to changes noticed in the role of museums in our societies: from traditional institutions dedicated to the protection of material references of humanity to institutions with an important social role related to human rights and sustainable development. Ecomuseums have then emerged in times of contestation, and their references nowadays serve as orientations for culture and sustainability.

Following the international standards, each region in the world has also adopted their own documents, setting baselines for the development of projects. In the European context, two conventions are mentioned as references for assessing cultural landscapes, topics specially undertaken by Ecomuseums: European Landscape Convention (2000), and the Faro Convention (2005). It is important to acknowledge those standard-setting documents to reach a common-ground, maintain dialogue and enhance cooperation between ecomuseums, civil society, governments and international organizations. The interconnections between culture and development are also noticed by the encouraging of cultural diversity (Convention on the Protection and Promotion of the Diversity of Cultural Expressions. UNESCO, 2005) and the alignment of the projects and institutions to Sustainable Development Goals (SDGs), as it will be presented in the next unit. The links to each document are available to facilitate the comprehension of the cultural heritage field (see references below, in the end of this unit).

Evolution of the concept of cultural heritage



How could each context be analyzed considering the conceptual framework promoted by UNESCO and other related institutions? Which are the main cultural references of your community? Can you draft a general framework of your tangible heritage, natural heritage and intangible heritage, after observing the cultural landscape where your institution is based? Can you identify the tangible, intangible and natural heritage of your community? These and other questions are important to start the understanding of your community and territory. Mapping the local heritage is a key issue to develop ecomuseums, using the available resources to foster sustainable development.

In the last decades, conceptual changes have been observed in the heritage and museum sectors. The raise of ecomuseology brought new perspectives to heritage, understood as a resource to local development. In this sense, according to Hugues de Varine (2002), education and sense of responsibility play an essential role in the safeguard of cultural diversity, when the development agendas are then tied to cultural heritage, territory, landscape, memory, lifestyles of inhabitants. Cultural heritage turns into a core issue for collective action linked to the life of citizens. If we adopt participative management, not only in the use of heritage, but in strategies for identification and promotion, we can amplify networks and involve diverse citizens. (Varine, 2002).

International Documents

Convention Concerning the Protection of the World Cultural and Natural Heritage (1972). Available at [this site](#).

Convention for the Safeguarding of the Intangible Cultural Heritage (2003). UNESCO. Available at [this site](#).

Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005). Available at [this site](#).

Declaration of Quebec (1984). Basic Principles of a New Museology. Available at [this site](#).

European Landscape Convention (2000). Council of Europe Landscape Convention. Available at [this site](#).

Faro Convention (2005). Council of Europe Framework Convention on the Value of Cultural Heritage for Society. Available at [this site](#).

The Santiago Roundtable (1972). Programa Ibermuseus. Available at [this site](#).

Recommendation concerning the Protection and Promotion of Museums and Collections, their Diversity and their Role in Society (2015). UNESCO. Available at [this site](#).

Engaging Communities: A Sociomuseological Approach to Ecomuseums

What is an ecomuseum? What differences can you find between traditional museums and ecomuseums? How are the relations established between the ecomuseums, communities and nature? How to connect your community's needs to an ecomuseum project? Ecomuseums work largely based on local participation, as shared processes of recognition, management, and protection of cultural and natural heritage, aimed at promoting sustainable development of their communities. Nowadays, the social role of ecomuseums is also addressed as a main issue, strengthening the significance of the projects to local communities.

Since the 1960s, diverse approaches to ecomuseums have been adopted. This diversity is observed as regional developments nurtured various possibilities of managing heritage locally through ecomuseums. The engagement of communities is one of the key issues addressed during the development of ecomuseums, considering the diversity of regional contexts where they are operating. How to understand community and engagement considering the contextual diversity where the ecomuseums are operating? For the ecomuseums approach, the idea of community is closely related to local development. The importance of identifying local resources and design sustainable strategies is preeminent for community development, strengthening social cohesion and fostering the people to engage in sustainable agendas. The identification of local needs and expectations facilitates the development of socially grounded and realistic projects, using sociomuseological approaches always with a participative perspective, as it will be further discussed in Module 4.

It is important to set the floor for a discussion presenting the main historical references for building up the concept of Ecomuseums, relating to New Museology and to the raise of Sociomuseology (Moutinho, 2016; 2014). The debates on Ecomuseums and Sociomuseology are conducted with a general understanding of how community-based experiences have been developed, considering the sociomuseological approach in a series of case studies in Latin America and Europe. The baselines established by the Declaration of Santiago (1972) and the rise of the International Movement for a New Museology (MINOM) in the 1980's encouraged social movements and communities to promote their own initiatives, and the UNESCO and other international documents have been nurtured by these ground-based experiences, strengthened by the development of public policies from the 1960's to the present day.

Can you identify different experiences developed by museums in your region? How are the museums addressing local issues, cultural heritage, and cultural landscapes? How are the communities involved in these processes?

The changes observed in the understanding of cultural heritage is also observed in the comprehension of museums. If the traditional understanding of museums used to focus on the ideas of building, public and collection, the ecomuseums shift is observed in the focus on territory, community and heritage (Varine, 2002; 2006; 2017). In 1972, in Santiago, Chile, UNESCO and ICOM promoted the Santiago roundtable, addressing local issues and questioning how the museums could participate and coordinate efforts to promote local development (The Santiago Roundtable, 1972).

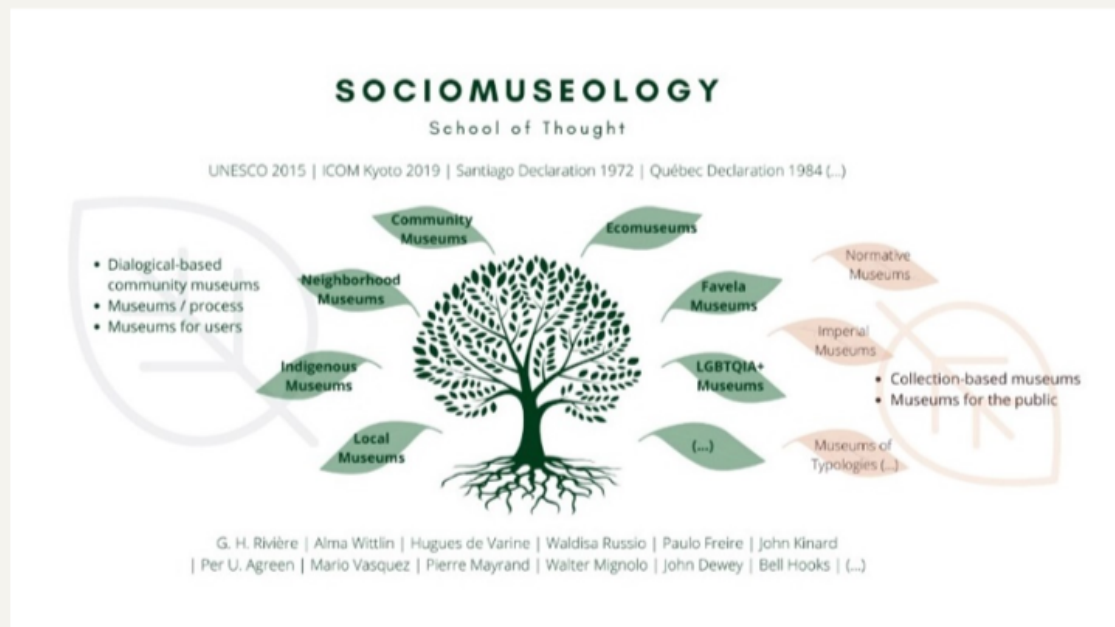


Source: Presentation by Leandro França. Department of Museology, Lusófona University, 2022.

This turn has been nurtured by democratic values, fostering communities to assume their heritage and the interpretation of their territories, foreseeing the social development of localities. The latest recommendation of UNESCO related to museums was adopted in 2015, and the recognition of the social role of museums was assumed as prominent for the development of museums and societies:

“Museums are increasingly viewed in all countries as playing a key role in society and as a factor in social integration and cohesion. In this sense, they can help communities to face profound changes in society, including those leading to a rise in inequality and the breakdown of social ties. (...) Museums are vital public spaces that should address all of society and can therefore play an important role in the development of social ties and cohesion, building citizenship, and reflecting on collective identities.” (UNESCO, 2015. Art. 16 and 17).

Nowadays, the strengthening of ecomuseums is connected to the promotion of cultural diversity, considering that “cultural diversity is a defining characteristic of humanity” and “that cultural diversity creates a rich and varied world, which increases the range of choices and nurtures human capacities and values, and therefore is a mainspring for sustainable development for communities, peoples and nations” (Convention on the Protection and Promotion of the Diversity of Cultural Expressions. UNESCO, 2005). After the adoption of the Sustainable Development Goals (SDGs), in September 2015, the enhancement of cultural heritage has been considered prominent and strategic for the sustainable development of communities. The ecomuseums can be protagonists in this process, addressing local issues in the present time and envisioning a sustainable future.



Source: Presentation by Prof. Mario Moutinho. Department of Museology, Lusófona University, 2022.

At least two approaches can be used for the first steps of the ecomuseum's development: the mapping of the local heritage, considering the natural, tangible and intangible heritage; and the identification of local problems, needs and aspirations of the community. All this process must be oriented with a life-oriented tendency, as museums are institutions in the service of human-being and societies (Moutinho & Primo, 2017). The identification of local needs and local problems, if discussed democratically, will promote ecomuseum as a place to hold meetings for territorial development.

How to identify strategies and respond to local needs with the use of heritage-based resources? How to comprehend your community's heritage as a resource for social development? It is important to maintain democratic processes for mapping and identifying the heritage of your communities. The knowledgeable management of local heritage can be identified as key issue for solving local problems and for promoting sustainable development. How can you promote these issues in your community? All these issues will be further discussed and developed with a practical perspective presented in the modules 2 (Ecomuseums & Sustainability), 3 (Planning, starting & sustaining the Ecomuseum) and 4 (Participation and active citizenship. Participatory processes).

Learning Unit 3

Life-oriented EcoMuseums

In-depth contextual analysis is essential for the development of ecomuseums. To this end, it is necessary to understand the territory, the local heritage and the citizens' needs. What is understood as territory? How to identify a territory, considering its cultural assets? How to interconnect citizens' needs to cultural heritage? The ecomuseum is a space for gathering diverse perspectives present in the communities, acting as a forum for democratic debates on the social role of museums for sustainable development.

The territory is one of the three pillars of ecomuseums. It is here understood as a landscape attached to a group of citizens and populations, which have previous cultural references linked to the use of local resources. The territory converges time and space, natural and cultural sources, portraying nature in its wilderness, but also as adapted by traditional and industrial society in their own image. It (the ecomuseum) is an expression of time, when the explanations it offers reach back before the appearance of man, ascend the course of the prehistoric and historical times in which he lived and arrive finally at man's present. It also offers vistas of the future, while having no pretensions to decision-making, its function being rather to inform and critically analyse. It is an interpretation of space – of special places in which to stop or stroll. (Rivière, 1985).

Each territory has specific problems to be addressed by local inhabitants. The cultural assets can serve as valuable resources for community working focusing on the answers to local questions. It is important to identify local problems and issues to be addressed by the ecomuseum, considering that its social role is related to local development, highlighted by the democratic values of heritage and cultural diversity. Participative tools are very valuable for this democratic process – from the discussions of local issues to the decision-making processes to design strategies for local development, as it will be further discussed in Module 4.

Some of the tools developed for mapping the cultural heritage in specific territories are based on heritage education. Observation, Registration, Exploration and Appropriation are examples of these processes (Grunberg, 2007). The observation is based on sensorial means for identifying the main cultural references, using sight, smell, hearing, taste and touch for mapping cultural heritage. The registration uses drawings, verbal descriptions, maps and other logic and intuitive means. The exploration is based on the analysis of the identified cultural references through public discussion. Finally, the appropriation is related to the use of creativity for expressing the cultural heritage through drama, music, paintings, filming and other artistic actions.

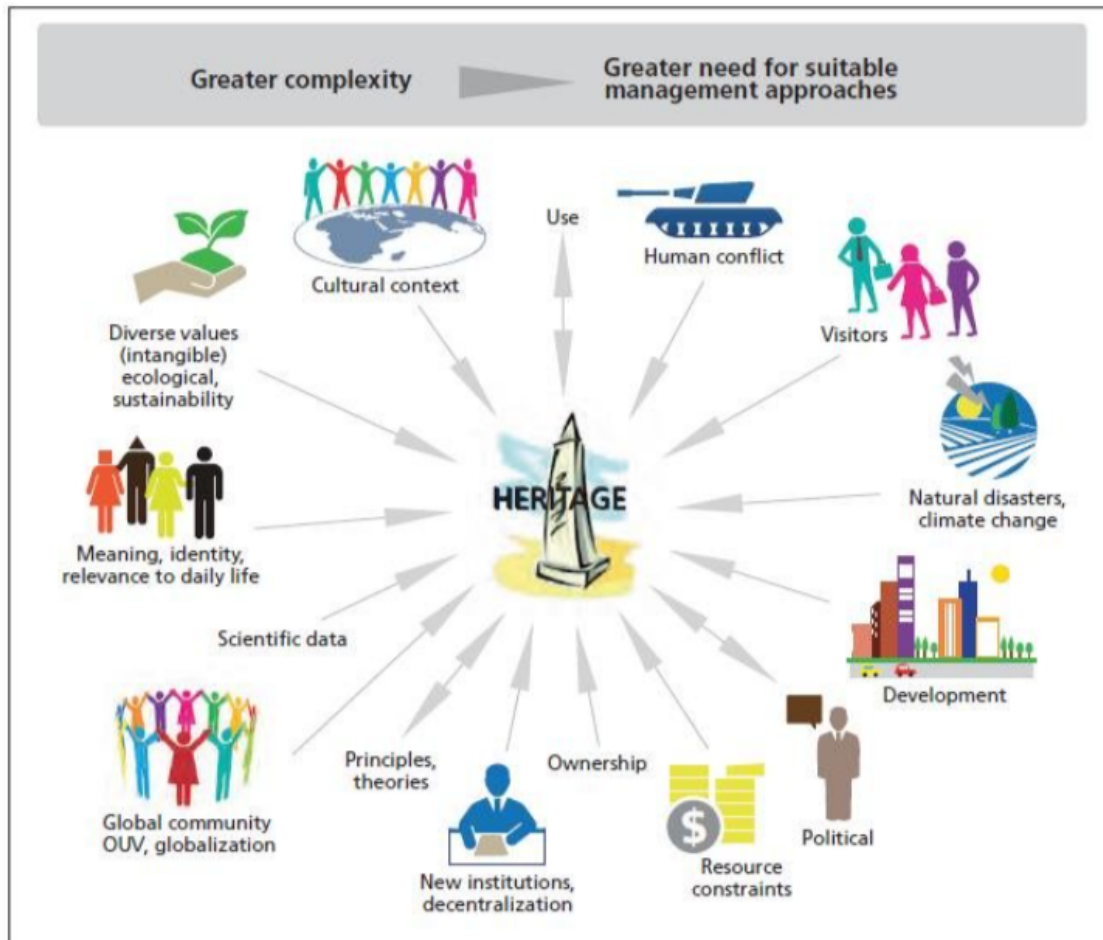
The ecomuseum can provide communities with solutions for local territories issues, considering the economic, social and cultural development – i.e. sustainable solutions for water and energy use; promotion of peace in conflict zones; promotion of economic opportunities for local enterprises, considering handicraft production, tourism attractions, local products; strengthening interrelations with schools, in close collaboration for the development of educational actions; promotion of local expressions and festivities; act as an opening space for community meetings etc.

Can you identify any local issues and social problems to be addressed by the ecomuseum? How can the ecomuseum cooperate locally for the territorial development? How do you see the ecomuseum as a hub for gathering diverse people and communities, for network building and for the development of cooperation projects?

One interesting perspective to be developed by ecomuseums is the understanding of the power and poetics of citizenship for life-oriented ecomuseums (Chagas, 2007; 2010). Ecomuseums should embrace the needs of societies, focusing on democratic values, the diversity of cultural expressions and the sustainable development. Museums must serve life and society, and ecomuseums committed to sustainable development must adopt a diversity of positions to face contemporary issues, respecting local needs and aiming for fair and well-being societies.

Do you have anything similar developed in your ecomuseum? How can you explore these tools to explore the territory and enhance education actions for the promotion of cultural heritage? Can you identify local issues and design strategies based on cultural resources found in your territory and community?

The organization of available information will enrich each project developed by the ecomuseums, based on the idea of identifying local problems and analyzing how can you respond to issues identified in the local territory. The next modules will present a practical perspective with specific tools and strategies for linking ecomuseums to SDGs, strategic planning for the development of ecomuseums and territorial diagnostics for participative management.



Some examples of old and new issues in heritage management. Source: Penna, 2018.

Number of hours to be dedicated	6 hours (2 hours per unit).
EFQ level	3

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Introduction

Module's Guideline for the User

The United Nations 2030 Sustainable Development Goals (SDGs) represent the greatest and most 'global' effort to effect change capable of setting humanity and the biosphere on a path towards a sustainable future. Alarming disasters, caused by environmental changes reflection on what ecomuseums do, or could do, to achieve them and respond to the climate emergency is needed. The role of museums in this field is internationally recognized and growing. Ecomuseums, defined as a "community-led heritage or museum project that supports sustainable development" (Davis 2011;85), are in a privileged position among cultural institutions (Dal Santo et al., 2021). Ecomuseums can locally empower people in the sustainable use of their heritage and promote a culture of sustainability (Duarte, 2012; OECD and ICOM 2018; Brown 2019; Riva, 2020; Dal Santo, 2021). Globally they can lead the world towards a sustainable future by working to support the UN 2030 Sustainable Development Goals (Lanzingher & Garlandini 2019; McGhie 2019; Brown 2019) and develop actions to fight climate change (McGhie 2020).

Module's Overview

The module introduces the issues of sustainability as a direction of ecomuseums and community museums action in facing today's world challenges. It helps you to understand sustainability, mainstream sustainability by SDGs in plans and projects, monitor impacts and report results.

Module's Aims & objectives

This training module aims to improve skills needed to develop holistic projects of participatory management of the living heritage in a sustainable way, considering their economics, social, environmental, local, and global impacts. The learning objectives are:

- Understanding the concept of sustainability, and SDGs, and how they are related to museums and ecomuseums.
- Learning to plan sustainability by fixing measurable goals and thinking at the inside and outside impacts that museums and ecomuseums could have.
- Giving museums and ecomuseums the instruments for measuring and reporting the sustainable actions they are carrying on.

Module Learning Outcomes

The expected results of this module are:

1. Learning to implement participatory living heritage management models for local development linked to global sustainability”.
2. Developing managerial skills for holistic and co-creative projects (co-learning, subsidiarity, local empowerment, and global networking).
3. Being able to use the 2030 UN SDGs as cross-cutting objectives in ecomuseums activities.
4. Integrating the SDGs into ecomuseums policies.
5. Understanding the role of ecomuseums in the “climate action” goal as a transversal objective.
6. Implementing self-assessment tools to monitor ecomuseums outcomes and inside and outside impacts.

Knowledge: You will be able to understand sustainability and Sustainable Development Goals, to learn examples of best practices in other ecomuseums and how they can be part of your strategies.

Skills: You will be able to develop specific SDGs-related policies and actions and to evaluate and report cultural impacts of your work.

Competences: You will increase your competence in managing cultural heritage in a participated and sustainable way with the purposes of local development.

Learning Unit 1

Understanding sustainability and SDGS. Among Global and Local

Short Description

Understanding sustainability: new skills for ecomuseum staff to interpret the concept of sustainability, presenting the today's poli-crisis challenges (the Anthropocene, global/local culture vs planetary boundaries) and opportunities (become cultural catalyst to help cultures imagine flourishing, inclusive futures for the entire planet and all its inhabitants).

Understanding SDGs:

- Understand the SDGs as a useful tool to guide ecomuseums towards meaningful cultural impacts.
- SDGs as cross-cutting objectives in ecomuseums activities to
 1. clarify the nature of the local/global challenge/opportunity and
 2. develop an ecomuseum's own approach to a sustainability vision and plan.

1. The roots of the sustainability discourse.

We are living in a challenging world, in a dystopian scenario characterized by inequality, massive population growth, climate change, globalization. These are the results of years of resource extractions, humans' exploitation at the service of a demanding economic sector. Our time is characterized by new and old negative effects. It has been 75 years that we are living in a new geological era, known as Anthropocene: the significance of this epoch is that it is characterized by humanity having become the largest single factor in how planetary systems are changing (Janes, 2009). Man lost the contact with nature, using and exploiting planet resources, which are limited; from the mid-20th century onwards, humanity has been systematically violating the 'planetary boundaries' (Worts, 2022).

Identifying and quantifying planetary boundaries that must not be transgressed could help prevent human activities from causing unacceptable environmental change. These boundaries define the safe operating space for humanity with respect to the Earth system and are associated with the planet's biophysical subsystems or processes. If you want to know more about planetary boundaries, visit [this site](#).

An example for understanding how humanity transgressed boundaries, is the concept of ecological footprint, which indicates how much area of biologically productive land and water an individual, population, or activity requires to produce all the resources it consumes and to absorb the waste it generates, using prevailing technology and resource management practices. The Ecological Footprint of a place is usually measured in global hectares and must be compared with the biocapacity of that place. Since Humanity's Ecological Footprint is 2.7 global hectares per person (of which 60% is carbon Footprint) and the planet biocapacity is 1,5 we are living well above the Earth limits, and we are using the planet's natural capital in the very near future if it does not undertake a policy of sustainable development.

Unfortunately, according to recent studies Global warming triggered by anthropogenic emissions is bringing us ever closer to points of no return that cause irreversible global climate destabilization. The UN general secretary, Guterres, asked ministers from 40 countries for a meeting to discuss the climate crisis in July 2022: "We have a choice. Collective action or collective suicide. It is in our hands."

For more information, visit [this site](#).

Climate change is just one of the many problems the world is facing; respect for the environment has very deep historical roots.

The environmental issue began in the 60s and 70s and was focused on the controversies of a development model mainly centered on the objectives of modernization, progress, and growth (Borrelli, Mela, Mura, 2023). In fact, economic development has been based only on economic rules centered on growth, modernization, and progress, and considers the environment from an "extractive" perspective.

As concern for the future of the Earth was growing, also governments began to collaborate in defending the planet and the environment, and many conferences were organized to reach such an aim.

In 1987 the Brundtland Report addressed the issue of the close connection between economic development and environmental quality. **Sustainable development was defined as: "the satisfaction of the needs of the current generation without compromising the ability of future ones to respond to theirs"**. Economic development must therefore be planned "in the long term", respecting the environment.

One of the effects of the Report was the UN Conference on Environment and Development in Rio de Janeiro in 1992 (Earth Summit) which aimed to "develop strategies to stop the state of environmental degradation [and] confront each other to create political strategies for environmental, social and economic rebalancing "(Zabini, 2007 in Borrelli Mela, Mura 2023). **The definitions of sustainable development share a focus on the three pillars of sustainability: economic, social, and environmental. Sustainability is a balance between these factors. A very evocative example is that of Young's stool (1997): the three pillars are the legs of the stool and to remain in balance they must all have the same length. However, the stool metaphor has been criticized because the environment should be the floor on which the stool rests, as it is the most significant for humanity.**

Subsequently, the focus was instead on the analysis of the points of contact and intersection between the three pillars that are no longer represented as isolated entities (Gibson 2002 in Borrelli Mela Mura, 2023).

Therefore, increased the awareness of having to deal with environmental issues globally, through the activation of partnerships, and cooperation. The principles developed during the Summit laid the foundation for the thinking of the following years, in particular:

- The need for a holistic relationship (finding the balance between the economic, social, and environmental dimensions) in dynamic balance, attentive to details and to the whole, with a view to interaction between the parties.
- The logic of the long term, with the planning / evaluation time horizon.
- Equity: intra-generational, equal access to resources, with a view to justice and equal opportunities between subsequent generations.
- Efficiency in the use of resources.
- Ecological sustainability: conservation of the stock of resources and the creation of wealth without damaging the systems, respecting their carrying capacity.
- Participation, through the activation of cooperation: sustainable development is participatory development (Borrelli Mela Mura 2023).

One of the documents that emerged from the conference was Agenda 21, a programmatic-operational agreement aimed at the complete integration of environmental protection and development through international cooperation.

Since 1992, the experience developed with the first meeting in Rio is repeated every ten years, to review and update proposals and directives based on new challenges and opportunities.

Agenda 21 guided the governance of sustainable development until 2015, when it was replaced by the 2030 Agenda.

A more sustainable and equal world has always been a priority for UN. One of the first attempt, from 2000-2015, were the **Millennium Development Goals**, which introduced a public- and sector-friendly approach built around goals. The innovation was that rather than complex planning processes, a set of eight goals were set out.

This goal-based approach was recognized as a success, and consequently incorporated into the successor programme, Agenda 2030 and the 17 Sustainable Development Goals (SDGs).

2. Agenda 2030 and the SDGs: A Goal-based approach

Agenda 2030 is “a plan of action for people, planet, and prosperity. It also seeks to strengthen universal peace in larger freedom” (McGhie, 2021 pag. 8).

The Agenda is universal (for all Countries); prioritize disadvantaged; it is interconnected (goals have to be reached at the same time); it is inclusive (everyone can play a part, as a right); it aims to create partnerships for reaching the goals (McGhie, 2021 page 9).

The Agenda 2030 refers to the 5Ps: people, planet, prosperity, peace and partnership. The 5Ps take the three classic dimensions of sustainability (social, environmental, and economic) and turn them into goals; moreover, peace and partnership are other two dimensions added to sustainability (McGhie, 2022, page. 2).

Agenda 2030 is based on the 17 Sustainable development goals:

“To understand SDGs, it is necessary to bear in mind some aspects. The SDGs are the results framework for Agenda 2030 itself; second, the SDGs are not a checklist, but they are a to-do list that we help achieve as a programme for positive change; third, the SDGs are a connected set of goals that are to be achieved together and in working to achieve one or more, we must check that we are not achieving progress in one area by creating problems elsewhere; fourth, in many ways, the SDGs are not a new Agenda, but the latest attempt to put the world on a path to sustainable development. Fifth, the Agenda is not a programme of new agreements, but a mechanism to better achieve a wide range of existing multilateral agreements. The Agenda aims to achieve goals simultaneously. Sixth, although the Agenda and SDGs are set out as an invitation to all sectors to collaborate as an innovation for multilevel governance, they are too readily subsumed into an old-fashioned mind-set of information flowing upwards to inform national reporting” (McGhie, 2022 pag.2)

The SDGs, are also known as the Global Goal and they are a universal call to action to end poverty, protect the planet, and ensure that by 2030 all people enjoy peace and prosperity.

The features of the programs are:

- a rights-based agenda, and an attempt to promote multilevel governance of complex challenges.
- universal values and human rights are a common direction of all Countries and sectors.
- collaboration between different sectors helps create new sustainable development outcomes.

In this sense, a broader approach has been adopted, and the collaboration was one of the pillars of the programs. Moreover, these goals must be considered as a whole, and reaching one of them doesn't mean that another goal will be neglected.

GOAL 1: No Poverty	Expand support for the poor and address the root causes of poverty, especially in developing Countries.
GOAL 2: Zero Hunger	Ensure everyone has access to safe, nutritious food on a regular basis and a healthy diet; and that agriculture is resilient and operates in harmony with nature.
GOAL 3: Good Health and Well-being	Ensure universal access to sexual and reproductive health services, prevent infectious diseases, and tackle public health issues.
GOAL 4: Quality Education	Everyone has good-quality education that enables them to participate fully in society.
GOAL 5: Gender Equality	Eliminate all forms of sexual discrimination, violence and harmful practices against women and girls, and uphold sexual and reproductive health and rights, so they can participate fully in public, economic and political life.
GOAL 6: Clean Water and Sanitation	Ensure everyone has a reliable, safe water supply and good quality sanitation.
GOAL 7: Affordable and Clean Energy	Ensure everyone has access to electricity, clean fuels and technologies for cooking, and increasing the use of renewable energy everywhere.
GOAL 8: Decent Work and Economic Growth	Protect employee rights and promote safe and secure working environments for all workers, especially those in precarious employment. Support the development of economies.
GOAL 9: Industry, Innovation, and Infrastructure	Develop good-quality, sustainable and resilient infrastructure. Foster innovation and research that will advance sustainable development.
GOAL 10: Reduced Inequality	Reduce inequalities in income and opportunity between and within countries, linked with gender, age, disability, ethnicity, or another shared characteristic.
GOAL 11: Sustainable Cities and Communities	Develop cities, towns and communities that are sustainable as places for people and communities to live and work in, and in harmony with nature, in the context of rapid social change and a changing climate.
GOAL 12: Responsible Consumption and Production	Achieving a wide range of other Goals, embracing the challenge of producing and consuming less, encouraging reuse, and reducing waste, reducing pollution, and using natural resources in sustainable ways.
GOAL 13: Climate Action	Take urgent action to combat climate change and its impacts.
GOAL 14: Life Below Water	Conserve and sustainably use the oceans, seas, and marine resources for sustainable development
GOAL 15: Life on Land	Sustainably manage land-based habitats and natural resources such as forests, restore damaged landscapes and halt the spread of deserts. Safeguard biodiversity and ecosystems
GOAL 16: Peace and Justice Strong Institutions	Ensure everyone has access to justice and information. Transparent and accountable institutions are necessary for achievement of this and other goals.

Figure 1: The Agenda 2030, and the 17 SDGs.

The **Agenda 2030** is largely achieved through the 17 SDGs, which are supported by **169 targets** that, if addressed, have been agreed to make the biggest contributions to securing a sustainable future. Progress towards these Targets is agreed to be tracked by **232 unique Indicators**.

The targets are a sort of sub-goals, that are the more practical level to work with. The indicators are used for monitoring the activities of each country. The targets and indicators are a way for measuring the sustainability evolution and real impacts. SDG can be considered as the "big goal", while targets refer to the programmes for activities, indeed, the same SDG can have more than one target. For example, in SDG 4 (Quality Education), one of the targets (4.7) is: "education for sustainable development and global citizenship" (see figure 2 and 3). This means that it is needed to organize specific actions for reaching this aim, for example 4.a): build education facilities that are disability and gender sensitive.

Indicators are the measures of how we are doing in achieving the target, to monitor change and improvement. In practice, many of the official indicators are not particularly relevant to the work of sectors, including museums and cultural institutions. The targets are well suited to practical use, and sectors and organizations can set their own indicators to monitor their progress.

Here a useful guide that you can use for better understanding the SDGs target and indicators: unstats.un.org/sdgs/metadata

<p>2. Support and provide learning opportunities in support of the SDGs</p>	<p>TARGET 4.7</p>	<p>TARGET DESCRIPTOR</p>
		<p>Target 4.7 "By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including, among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non-violence, global citizenship and appreciation of cultural diversity and of culture's contribution to sustainable development"</p>
	<p>EDUCATION FOR SUSTAINABLE DEVELOPMENT AND GLOBAL CITIZENSHIP</p>	

Goals and targets (from the 2030 Agenda for Sustainable Development)	Indicators
<p>4.7 By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including, among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non-violence, global citizenship and appreciation of cultural diversity and of culture's contribution to sustainable development</p>	<p>4.7.1 Extent to which (i) global citizenship education and (ii) education for sustainable development are mainstreamed in (a) national education policies; (b) curricula; (c) teacher education; and (d) student assessment</p>
<p>4.a Build and upgrade education facilities that are child, disability and gender sensitive and provide safe, non-violent, inclusive and effective learning environments for all</p>	<p>4.a.1 Proportion of schools offering basic services, by type of service</p>
<p>4.b By 2020, substantially expand globally the number of scholarships available to developing countries, in particular least developed countries, small island developing States and African countries, for enrolment in higher education, including vocational training and information and communications technology, technical, engineering and scientific programmes, in developed countries and other developing countries</p>	<p>4.b.1 Volume of official development assistance flows for scholarships by sector and type of study</p>
<p>4.c By 2030, substantially increase the supply of qualified teachers, including through international cooperation for teacher training in developing countries, especially least developed countries and small island developing States</p>	<p>4.c.1 Proportion of teachers with the minimum required qualifications, by education level</p>

Figure 2 & 3: SDG 4 (Quality education) target. (2) Source: Mcghie 2021 and this Website. Targets are sub-goals to be reached under the main SDG. This will be more effective for the evaluation and the monitoring

The first step in addressing SDGs targets is making a specific commitment to help achieve their success (McGhie, 2021 pg 14).

Even though the SDGs must be considered as a whole, and should be reached with the collaboration of all at a geopolitical level, there are various contrasts, which manifest themselves in the imbalance between sustainability strategies and national economic interests. **This obstacle limits the cooperation between the different nations to find a common solution on a global level, which however depends on the choices to be applied at the local level, because knowledge of the local reality is fundamental to make the practices effective.**

1. Think global, act local. How cultural institutions and ecomuseums can help in achieving SDGs

A first step towards the sustainable transition is to recognize the role of people as the only beings capable of taking steps towards sustainability. In this sense, culture plays a key role in sustainability practices, and its enhancement can foster positive dynamics towards the implementation of the Sustainable Development Goals. Cultural evolution occurs when cooperation fosters common behaviors and values. Through social interactions, different cultures meet and clash, modifying and favoring their evolution; in this sense, ecomuseums, in which communities play an important role, can be considered incubators of cultural evolution, capable of creating relationships that enhance the sustainable way of life (Sutter & Teather, 2017 page 53).

The role of ecomuseums as actors able to interpret and satisfy global needs at local level has been already discussed by Borrelli and Davis (2012): "ecomuseums implement dynamic processes that allow communities to identify, preserve, interpret and manage their capital resources for sustainable development ", ecomuseums, communities are involved in decision-making processes with the various stakeholders in the area, acting as spokespersons for territorial needs. The strength of ecomuseums lies in their dynamic nature, capable of adapting to socio-cultural changes and of finding solutions at the local level. Ecomuseums strengthen the sense of place and the positive relationship between culture and nature both at the local level, through participatory processes, and at the governance level, where they can have positive influences in implementing a culture of territorial governance (idem).

Sustainable development activity in and with museums and other cultural institutions can be considered as the quest to progressively improve the ways in which they empower people to claim their human rights through their institutions, such as their Right to Participate in Cultural Life, Right to Education, Freedom of Expression and Right to Information, Right to Participate in Public Affairs, Right to Development and other rights (McGhie 2022).

Self-reflection questions

1. Why is the goal-based approach important?
Answer: As the issue is to use the goal-based approach to find verifiable and measurable means. maybe to connect the strategies developed locally and globally to clear ways of managing, monitoring, and evaluating each project to achieving the defined goals
2. List the three dimensions of sustainability. Which of these dimensions are integrated into your museum / ecomuseum?
Answer: economic, social, and environmental.
3. What are the other two dimensions of sustainability introduced by the 2030 Agenda?
Answer: Peace and partnership.
4. What are the SDGs? Why is it important to reach them at the same time?
5. Take a tour of your institution and try to think about what elements you could improve on to contribute to one of the SDGs. For example, how is your meeting room heated (GOAL 13) How are tangible and intangible assets managed, do you collaborate with other institutions (Goal 17)?
6. Design the sustainability table with 4 legs: culture, community, economy, environment. Organize a meeting with the community and reflect on these four aspects together. If one of the table legs is shorter than the other, sustainability is not balanced. Think together about how to improve so that your sustainability table is balanced. The exercise can be repeated periodically.
7. Draw / print the 17 SDGs, and during a meeting with the members of the ecomuseum, each one will give an example of action / how he understands this goal.
8. What is the right-based approach in sustainability?
9. "To think global and act local". Reflect on this sentence with your group.

Designing Sustainability: Defining Priorities and Fixing Objectives

Short Description

This module aims to give competences for fixing feasible sustainability objectives and plan actions to maximize cultural impacts.

You will learn new skills:

- How to manage the living heritage in a participating and sustainable way with the purposes of local development.
- How to create specific policies and actions related to SDGs.
- Managerial skills to develop holistic and co-creative projects: co-learning, subsidiarity, local empowerment, and global networking.

1. Design and co-creative planning through lateral and vertical thinking, co-learning, subsidiarity, local empowerment, and networking

Imagine whether museums could develop practices to be effective catalysts for cultural change and adaptation in this period of the Anthropocene (Worts, 2017). Through the hard work of co-creative design and planning all this is possible and can produce significant impacts! Since ecomuseums design not only “for” but also “with” the community, you need to develop skills and strategies to achieve these goals.

One of the limitations of our traditional way of thinking (the so-called vertical thinking) derives from the fact that the brain is an automatic system: every time it finds a logical and formally valid assumption, it gets stuck in a sort of dead end and proceeds solely on the basis of this assumption. Imagine what happens when these wrong assumptions are considered valid: 1. the planet’s resources are unlimited, 2. there is no interdependence between systems and peoples, 3. The only valid economic model is liberal capitalism based on profit maximization, 4. museums are about collections and not about society and man. 5. The man, in charge of modern economics, has a calculator in his head, ego instead of heart, money in hand and lives in solitude on a planet without limits.

Unfortunately, science does not always succeed in unhinging erroneous models and concepts like these. The results of a recent survey showed that around 30% of the sample of 12,000 Europeans do not trust or doubt science. Before starting to design and plan for your ecomuseum you need to consider using the other form of thinking of which we are capable, that is, lateral thinking, the one that thinks to think, that breaks the mold, that uses free space beyond the boundaries of the “reasonable” (De Bono, 1990). **Ecomuseums can use and propose to use this lateral thinking since they already practice it through participatory tools and management models such as, for example, the shared management of common goods (Arena, 2006) and co-creative partnerships (Koster, 2020).**

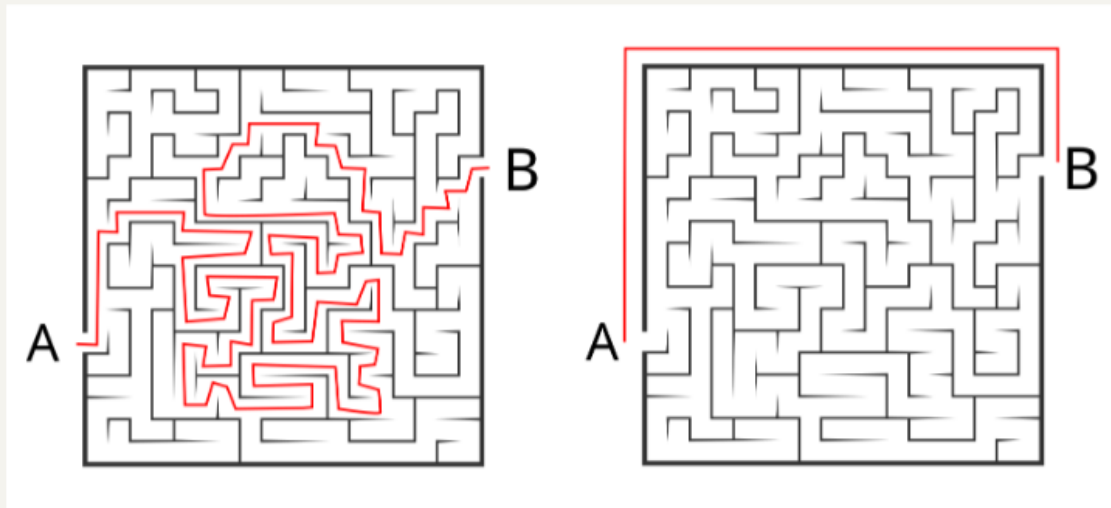
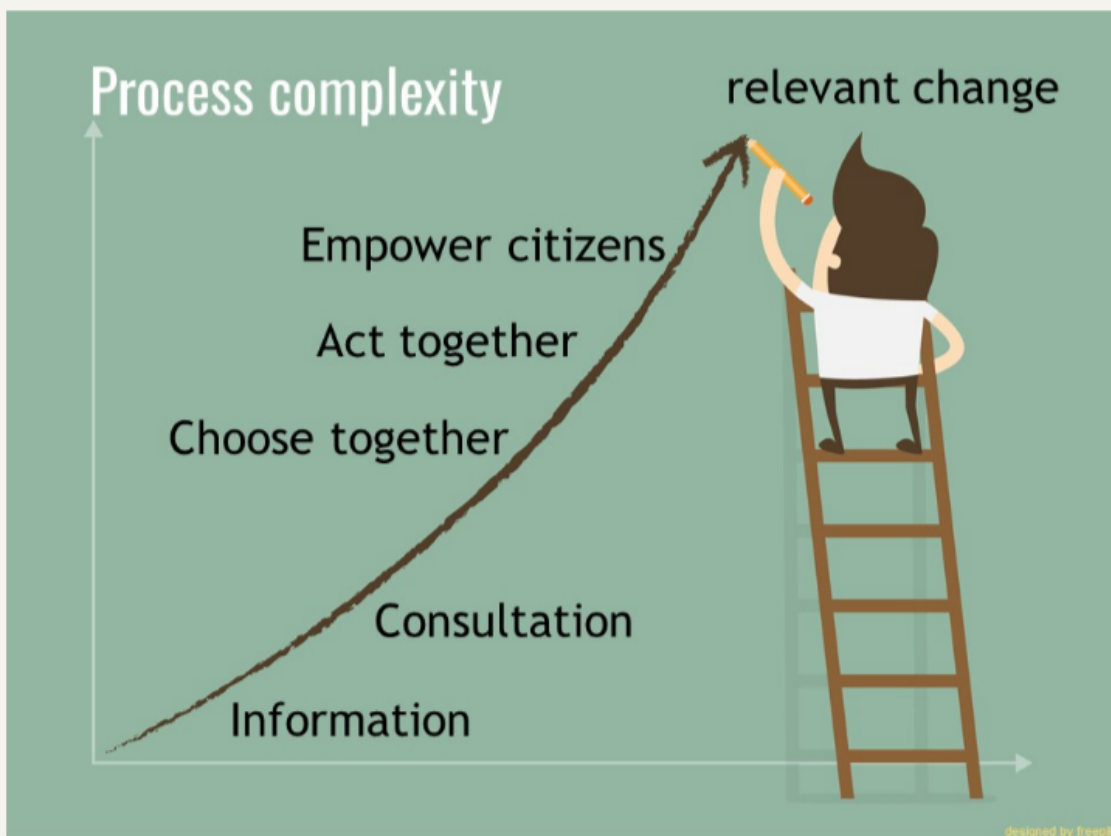


Figure 4. Difference between vertical and lateral thinking. On the left: traditional thinking makes assumptions of what the rules are; on the right: lateral thinking disregards "implied" rules.

Co-creative partnership

Co-creativity is a process that educators understand well: when a teacher promotes in students the ability to make sense (direction and meaning) that draws on their personal experiences, visions and even frustrations. When there is a bond of trust, the student's creativity is unleashed. It often results in new learning for both the teacher and the student, that's why it's co-creative. If a museum collaborates with an organization and if a bond of trust is established, synergy can produce visions, insights and idea generation tools intended to challenge current thought patterns. Moreover, impacts will be significant if museum projects, and programs are geared towards change within the wider living culture and not simply within museum buildings.



Many museums, maybe even yours, have developed a great deal of expertise in very specific areas of interest: history, science, art, etc. Through co-creative partnerships museums, on the one hand, can facilitate knowledge and understanding (i.e., expertise) from a wide range of experiences. On the other hand, they can facilitate the intersection of competence (whose goal is to control) and wisdom (which creates well-being). Through such integration, museums can help their communities to imagine thriving and inclusive futures.

Shared management of the commons

Probably your museum is developing processes of participation for designing “with” the community. To achieve significant cultural changes and impacts, consider experimenting with the highest levels of the scale of participation, up to the support of community projects (empowerment) for the shared management of the commons. The current situation, which due to the poly-crisis sees the drastic reduction of private goods, requires the recognition and enhancement of common goods. However, on the one hand, the community often does not recognize these goods as community heritage: ecomuseums are very active in solving this problem. On the other hand, the obsolete governance model, based on the logic of bipolar administrator-administered management does not allow the community itself to activate its resources to express ideas and implement actions for the solution of problems that, often, because their complexity, cannot be solved by institutions as museums alone (Arena, 2006). Trying to solve this problem is complicated, but it is possible. For example, by implementing the principle of subsidiarity that underlies European rules, it is possible to promote the shared management of common goods.

Good practice: collaboration pacts in Parabiago (MI)

For the Ecomuseum of Parabiago (MI), the co-creative and participatory processes are at least as important as the results and the outcomes of the planned actions. In fact, the interaction of the local actors is essential to create a sense of place and community while maximizing impacts. The aim is not only the realization of participatory activities, but also to trigger cooperation agreements with citizens, for the care, management, and regeneration of the cultural heritage and the landscape. In this way, the ecomuseum becomes a facilitator that enables people to apply their creative and physical energies, while sharing resources inside the community itself – all for the general interest and to produce and develop common goods. The agreements that were concluded over the years have been both formal and informal.

To regulate and promote the shared administration, in 2016 the Municipality of Parabiago (that manages the ecomuseum) approved the Regulation for the active participation of the community, to promote resilience processes for the care, the regeneration of urban spaces, social cohesion and security (fig. z).

Active citizens submitted ‘ideas’ which were first reviewed by the Ecomuseum staff. The ecomuseum:

1. evaluates the general interest of the idea and the coordination with other activated projects.
2. Identify relevant trends that need to be either supported or redirected.
3. Identify stakeholders and the living heritage who need to be involved in the project.
4. Defines the way that projects might be funded, the ways of facilitating, empowering, and training of the active citizens,
5. Identifies and defines the monitoring programme of desired impacts on, and within, the community (identifying what kinds of change are being sought).

#CONDIVIVI THE PATH OF SHARING

Share Parabiago's commons to build community and release energy!
Propose and cooperate in regeneration projects to improve your town

1. I have an Idea

I've got an idea for the town



2. I'll find out

On www.comune.parabiago.mi.it
link "CONDIVIVO",
I read the guidelines



3. I share It

I share my idea

4. We develop It

We develop the proposal.
Has someone thought yet? Go to the step ten!



5. We propose It

We explain the idea.
Is it an occasional activity?
Complete the collaboration
agreement.
Go to the step nine



6. We project it

We project the
proposal with the team
work

7. Who else?

Who else can take part?

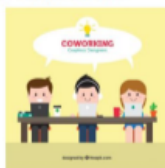
8. We defined It

We define the final project

9. We sign up

10. We collaborate

We achieve the project
and collaborate



We sign the
cooperation
agreement/
Pact and we
publish it on
the website



Designed by freepik.com

1. Agreement: the collaboration is occasional and it is immediately activated, just fill in a document.
2. Pact: the collaboration is continuous, it's necessary agree the project.



Ecomuseo di Parabiago
&
Assessorato all'ecologia

Figure 6: Source: Ecomuseo di Parabiago

When the idea becomes a project achievable, the Municipality council approves it and the ecomuseum and the citizens sign the agreement and start to work together in full autonomy. At the time the ecomuseum empowered 39 projects and some of them were renewed. For these projects the flow chart in fig.6, should be better redefined in a circular way. In fact, the monitoring of the concluded agreement gives feedback to better design the new agreement. If your museum wants to become a catalyst for cultural adaptation, it will need to become very familiar with these processes to find new ways to ensure that the well-being of the entire planet and all its inhabitants remains the overall vision of humanity.

2. How can ecomuseums help achieve SDGs and their targets?

The SDGs provide a useful tool for guiding ecomuseums towards significant cultural impacts. We suggest implementing seven key activities that are aligned with the SDGs (See [McGhie, 2021](#) from page 13):

1. Protect and safeguard cultural and natural heritage, both within museums and more generally.
2. Support Education for Sustainable Development.
3. Promote cultural participation for all.
4. Support sustainable/responsible tourism.
5. Support research for sustainable development, for example by supporting research activity and sharing its results.
6. Direct daily activities and operations towards sustainable development, for example through management, recruitment, resource use, waste management and management approaches and decisions.
7. Create partnerships and collaborations directed to sustainable development.

You can always ask yourself, “how can I develop a goal for better supporting a particular key activity”? or “how can I better support multiple SDGs through this key activity?”.

You can find useful answers in the chapter “Connecting the 21 Principles of Ecomuseums, the Sustainable Development Goals and Climate Action” (McGhie, 2022) in the book “Climate change discourses and practices from ecomuseums” ([link](#)) which illustrates how the ecomuseums can contribute to achieving development goals.

3. Mainstream by SDGs

You can integrate the SDGs into the plans and projects of the ecomuseum, following different methods. Here are some of them:

1. **Integration through the SDGs.** Implement an action plan to integrate one or more SDGs based on the 7 actions above. If you choose this approach, consider also the positive and negative impacts on the other SDGs.
2. **Integration through external initiatives.** Linked to external initiatives developed internationally (international days, years or decades) and implements an action plan based on the 7 actions.
3. **Integration by project.** Use an existing or planned project: understand its sustainable development potential, benefits and costs, and make a plan to maximize benefits and reduce and eliminate negative impacts, using the seven key activities as a guide to programming, delivery and communication.
4. **Integration through partnership:** work with other Cultural Institutions or other actors committed to the same SDG or a set of SDGs, adapted to local circumstances. As with linking to external initiatives, partnership creates greater results because pooling resources and results that cannot be created alone.
5. Develops policies, **schedules, and allocates resources** for sustainable development activities, eliminates unnecessary practices and policies that have negative impacts.
6. **Integration through work, training, and employment practices.** Make sustainable development everyone’s work, ensure that everyone has a clear role and responsibility and their positive and negative impacts on the SDGs. Include sustainable development in your volunteer and staff training and recruitment processes.
7. **Integration through monitoring, evaluation, reporting and communication:** aligns the activities of the ecomuseum with the SDGs. It communicates activities in an open and transparent way in terms of the SDGs, highlighting both positive developments and negative impacts to be addressed.
8. **Integration through experience, familiarity, and everyday use:** seeks to integrate the SDGs and sustainable development by making them a daily practice; the SDGs and sustainable development become part of people’s ways of working and interacting and, where they are properly understood, in the context of the vision of the 2030 Agenda.

Good practice: Circular economy in Parabiago (MI)

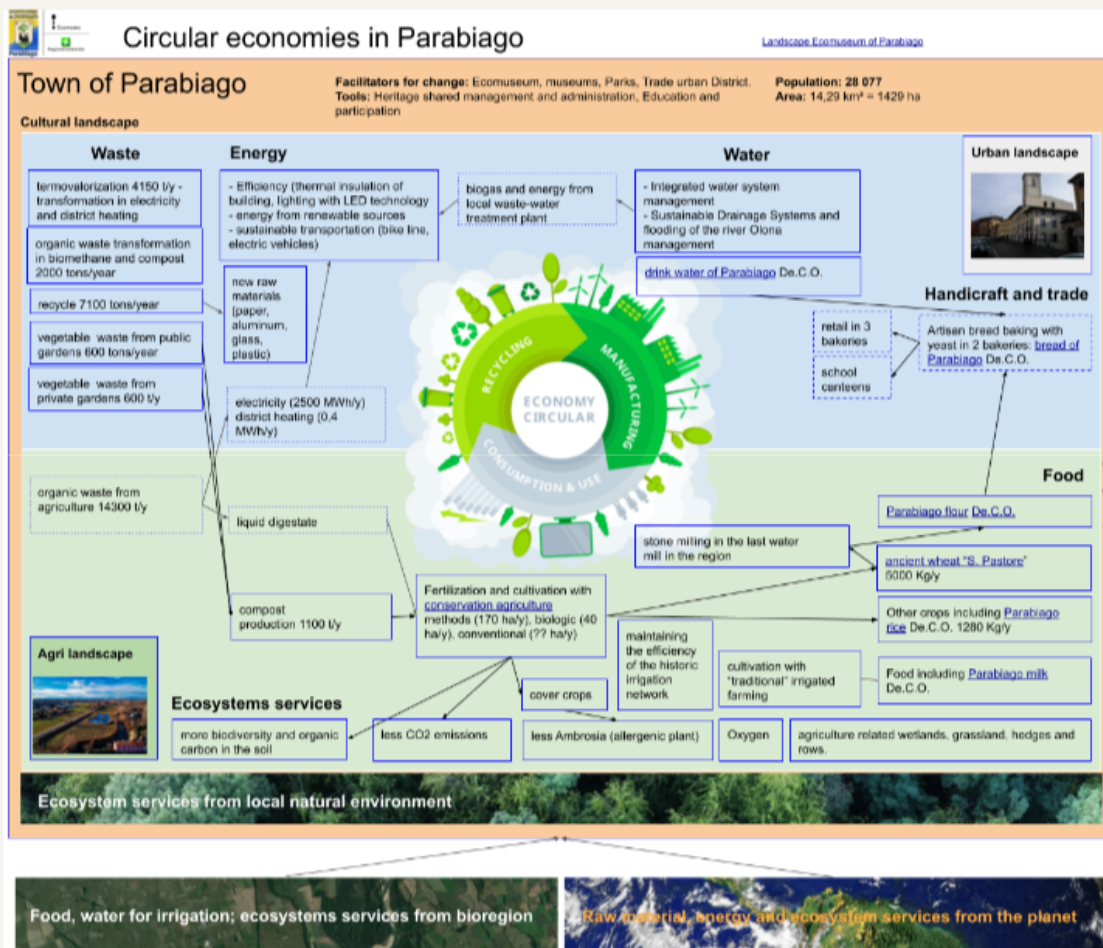
An example of integrating the SDGs through partnership which concerns the circular economy in Parabiago.

Farming is not the main economic activity in Parabiago (MI), but agricultural land is a very important feature of its landscape and a vital link between humans and nature. The Ecomuseum has explored the potential of embracing the principles of a ‘**circular economy**’. In this approach there are three basic principles: to eliminate waste/pollution; to ensure that materials and products can be reused; and that nature is regenerated in this process. Circularity, undoubtedly, must be the feature of a sustainable future. In 2015, the Ecomuseum proposed a project to the local community, for the Milan EXPO “Feeding the planet, Energy for life!”. This project focused on the production of bread, using an entirely local supply chain, including local grains, local processing, and local markets – with a strict attention paid to waste along the value chain. There were many local partners involved, including farmers, bakers, retailers, and consumers. (Dal Santo, 2020).

In a circular economy, the life cycle of materials and products are extended. Circularity means that the waste is always treated as a new input that has value and it is continuously being recycled. Essentially this is the foundational process of Earth's biological systems. Embracing circularity requires a shift in the traditional take-make-waste approach that has become a prevalent part of modern consumer society. The Parabiago Ecomuseum has been working with its partners to develop examples of circular approaches within its local economy (Fig. 7). The goal is that material inputs (new and recycled materials) are efficiently processed to create goods that meet the needs of people, while waste products become new inputs in ongoing processes. The result is that natural and human-made materials continue to circulate in the economy without generating large quantities of waste. Parabiago is advanced in waste and water management, handcraft, and trade, but much less in energy and food production. For this reason, the ecomuseum assessed that the greatest gains could be made in landscape regeneration.

The Parabiago's Ecomuseum is helping farmers draw on local heritage insights, especially cultural landscape knowledge, to adapt agricultural practices so they better meet the evolving needs of the present and the future. It is vital that local stakeholders feel empowered to work in balance with nature. However, the interactions of the Parabiago community with other parts of Italy and of the world remain largely tied to the intractable methods of our unsustainable global market for goods. Ideally, people in a region can meet their needs through their reliance on local natural resources and systems, while dramatically reducing reliance on goods that originate in distant lands. The Ecomuseum established a dialogue with local farmers, retailers, and citizens to experiment with a more sustainable approach to food production, designed to meet local demand.

In embracing the principles of a circular economy, the ecomuseum affirms that it is possible to significantly decoupled carbon emissions, and other forms of waste, from economic growth. However, the goal of sustainability will be undermined if market economies rely on long and complicated supply chains for their goods. This traditional approach to global goods is entirely dependent on relatively cheap and polluting transportation and is driven by corporate and societal demand for maximizing GDP, even at the expense of eroding the Earth's natural systems. With the reality of a globalized economic system outsourcing huge real costs that it doesn't want to be responsible for, it will take great courage for communities to live locally. The more ecomuseums, and traditional museums, can become catalysts for localizing economies and fostering principles of circularity, the faster humanity can breathe a sigh of relief.



Monitoring Impacts, Reporting Sustainability

Short Description

The aim of this unit is to give ecomuseums instruments for monitoring their impacts on sustainability.

To reach such aim, it will be important to debate:

- tools for monitoring ecomuseums outcomes and specially impacts inside and outside the cultural Institution.
- How to write a shared sustainability report to disseminate sustainability actions.

1. Sustainability Reporting

Monitoring, evaluating, reporting, and communicating the project results, outcomes and impacts are very important actions for an ecomuseum.

According to the Global Reporting Initiative (GRI), (2011), sustainability reporting means: “the practice of measuring, disclosing, and being accountable to internal and external stakeholders for organizational performance towards the goal of sustainable development... A sustainability report should provide a balanced and reasonable representation of the sustainability performance of a reporting organization – including both positive and negative contributions” .

Sustainability reporting, in the form of corporate social responsibility reporting, has been around for decades, mainly in the commercial sector, but any type of organization can report on its activity and there are good reasons to do so. Ecomuseums can adopt sustainability reporting principles, to disclose its sustainability commitments and the results obtained. It is possible to draw up a special report or integrate the principles into the documents that the ecomuseum already makes (programs and multi-year reports). This helps to promote public trust and build stakeholder trust. It also helps drive action and build collaboration among staff and between ecomuseums and other partners.

The largest sustainability reporting initiative is managed by the Global Reporting Initiative (GRI). There are several excellent resources to help companies integrate the SDGs into sustainability reporting. These can be applied to all kinds of organizations, including ecomuseums. Writing a GRI compliant report involves a significant investment of time and resources, but according to McGhie (2021) the principles can easily be used by anyone who wants to increase their transparency and be held accountable, presenting openly and honestly their contribution to sustainable development. GRI uses the following principles, which can be implemented by the Ecomuseum in reporting on its actions to help achieve sustainable development, regardless of whether they report to the GRI or not:

1. **Materiality:** i.e., reporting on what matters, also called ‘priority of principle’, reporting on the most salient sustainability impacts, both positive and negative.
2. **Inclusiveness of stakeholders:** stakeholders are clearly identified, and their opinions are sought on what an organization should work for, in terms of meeting the needs and aspirations of stakeholders and in the standard of service provided.
3. **Sustainability context:** The report should present the activity of organizations in the broader context of sustainability.
4. **Completeness:** The report should include content to adequately reflect the positive and negative impacts of an organization in all social, environmental, and economic dimensions, so that stakeholders can adequately understand the sustainability performance of the organization.

According to McGhie (2021) a sustainability report, compliant with the principles of the GRI, will include the following:

Foreword:	Declaration signed by the most senior member of staff, or by the Board of Directors
Organizational profile and governance:	Brief description of the organization, including its mission and governance structure
Strategy and analysis:	A strategic summary outlining how the GLAM relates to the challenges of sustainable development and how these are incorporated into its vision, strategic plan, operational plans, and reporting system
Reporting parameters:	Scope, boundaries (reporting parameters, e.g., sector, location, time, period) and reporting methodology
Environment, Society, Economy	The central argument. This will identify relevant objectives, targets and indicators and report on progress in addressing them. Both positive and negative contributions to each aspect of sustainability should be reported
Conclusions	A summary of the main findings of the report. This can discuss what has been achieved and what has not been achieved and set priorities for future activities.

Online resources: To develop sustainability reporting you can use resources available online such as:

- **Business Reporting on the SDGs: An Analysis of the Goals and Targets** (GRI and UNGC, 2017) ([link](#)). This tool links sustainability reporting requirements to SDGs and suggests activities to be undertaken.
- **Integrating the Sustainable Development Goals into Corporate Reporting: A Practical Guide** (GRI and UNGC, 2018) ([link](#)) This report is primarily aimed at organizations that are already undertaking sustainability reporting.
- Approaches and methodologies for civil society reporting on the SDGs and the 2030 Agenda: TAP Network Spotlight Reporting Guidelines (TAP Network, 2021) ([link](#))
- **SDG Compass** ([link](#))
- **B Impact Assessment tool** ([link](#))

2. Monitoring impacts (internal and external evaluation, self-assessment tools)

The evaluation in some European regions is a law condition for the attribution and maintenance of the “ecomuseum” label. It is also and perhaps above all a way to constantly improve the quality of methods and confirm the reality of social utility of each ecomuseum.

External evaluation. Many Italian regions have approved laws on ecomuseums, but few of them are evaluating the performance of ecomuseums and monitoring the impacts The Lombardy Region, for example, has evaluated ecomuseums both with a questionnaire ([link](#)) and through on-site visits. The Network of Lombard ecomuseums has created the Vademecum for ecomuseums 2.0 to explain and deepen the new minimum requirements for the recognition of ecomuseums in Lombardy ([link](#)).

Self-assessment (internal). If you are part of an ecomuseum that does not have the possibility to be evaluated externally or want to evaluate the activities of the ecomuseum more frequently, you should activate the internal self-assessment. Any self-assessment must be decided, designed, and carried out by the people taking the initiative, and this as far as possible in a collective and contradictory way, in order to reach consensual decisions.

In 2015 De Varine proposed a collective work of self-assessment that should lead to a consensual improvement of objectives, methods, and programs. It is not a question of producing quantitative results or apparently “objective” statistics. It is also in a certain sense a self-training course for the people most involved in the life of the ecomuseum and who often have not obtained a specific professional qualification.

The self-assessment table proposed by De Varine asks ecomuseums to answer three questions that we invite you to address separately:

Evaluation of the structure itself: an ecomuseum is not an ordinary institution, its parameters can, and often must, evolve: the territory, demography, the very concept of heritage, human and material means, the passage of generations, the main and secondary objectives, explicit and implicit, the methods of participation, sometimes even the legal status, as many elements as it is appropriate to reformulate and question periodically, in order to ensure the sustainability of the ecomuseum.

Assessment of the impact on the community, which will allow a measurement of the social utility of the ecomuseum: heritage management is not the only function of the ecomuseum, and it is not only the effect produced on the heritage that must be examined and measured, but the impact on all dimensions of local development in a dynamic way, that is, accompanying the endogenous and exogenous changes affecting the territory and the community.

Evaluation of the ecomuseum process and the methods used, to constantly improve the effectiveness of the action in its various forms: methods of participation.

The evaluation table is available at [this site](#).

Internal Evaluation can also be developed through the seven key activities proposed by McGhie reported in Unit 2, Point 2). They can help you identify your main contributions to sustainable development, both positive and negative (McGhie, 2021).

3. Inside/outside impacts model

Since an ecomuseum embraces the role of “cultural catalyst”, its planning processes must be based on the needs of the present and the future, while being informed and guided by insights from the past. One of the central opportunities for museums today is to expand their focus from generating cultural outputs for public consumption (e.g., exhibitions, programs, publications, etc.), to facilitating public engagement and co-creation processes that have significant outcomes and impacts on individuals, groups, communities, organizations, and more. If you are ready for this radical change in the vision and practice of museums, we suggest you evaluate the impacts of the ecomuseum through the “**Inside-Outside Impacts**” model by Douglas Worts (Fig.8). There are two fundamental components to the model. The first is the “Inside” dimension, which focuses on the physical manifestation of the museum and its contents, as well as the governance, skills, knowledge, wisdom, processes, and passion that are held by its staff (both paid and voluntary). The second dimension of the model is the “Outside”, which involves all the component parts of our living culture: people, communities, places, processes, values, goals, behaviors, systems, trends and more. Culture, in all its forms and manifestations, lives in the whole “external” dimension. The chapter of D Worts and R. Dal Santo in the book “Climate changes discourses and practices from ecomuseums” ([link](#)) illustrates the model in detail.

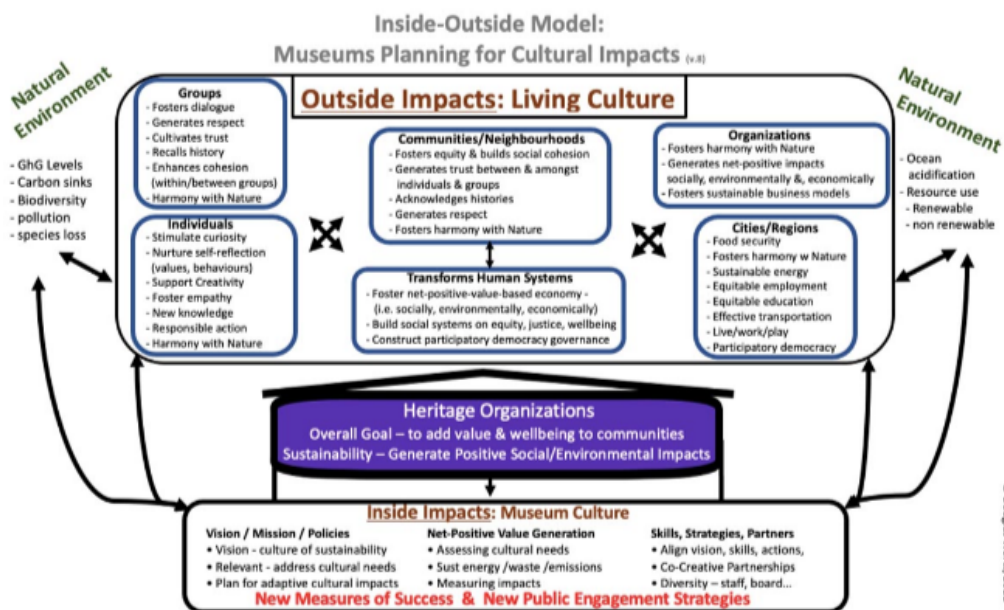


Figure 8: The inside-outside impact model by Douglas Worts.

Good practice: The chapter of R. Dal Santo and D. Worts in the book "Climate changes discourses and practices from ecomuseums" ([link](#)) illustrates the application of the Inside Outside impact model in the case study of the Parabiago ecomuseum. This ecomuseum used the model to guide its work towards co-creative impacts based on sustainability. The Parabiago Ecomuseum has developed a set of strategies to engage many community stakeholders in discussions about the evolving needs of the community and how best to meet them. By adopting a holistic approach, the ecomuseum operates indirectly on diseases of the physical landscape (e.g. loss of biodiversity, water pollution and inappropriate development), through direct interventions on the diseases of the "invisible" cultural landscape (e.g., lack of awareness of how human behavior is degrading natural systems, lack of sense of place).

Number of hours to be dedicated	60 min for texts
	60 min for self-reflection questions
	Minimum 60 min for self-evaluation
	60 min for references and link

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Sitography and practical examples

- Henry McGhie manuals for museums and sustainability: curatingtomorrow.co.uk/resources
- Parish maps: <https://www.commonground.org.uk/parish-maps/> ICCROM “Our Collections Matter” toolkit, provides a set of suggested indicator activities for each SDG target, and links to good-quality tools to help embed sustainable development action into museums and other collections-based institutions. ocm.iccrom.org
- Local 2030 website local2030.org
- SDG Helpdesk contain many excellent resources sdghelpdesk.unescap.org
- Ecological footprint data.footprintnetwork.org
- Sustainability books:
 - rachelcarson.org/SilentSpring.aspx
 - pages.mtu.edu/~asmayer/rural_sustain/governance/Hardin%201968.pdf
 - donellameadows.org/wp-content/userfiles/Limits-to-Growth-digital-scan-version.pdf
- **Understanding the SDGs target and indicators:** unstats.un.org/sdgs/metadata_ & unstats.un.org/sdgs/indicators/indicators-list.
- **Planet boundaries:** stockholmresilience.org/research/planetary-boundaries.html & www.scienzainrete.it/contenuto/articolo/milly-barba-rita-occhipinti-michela-perrone-valentina-tudisca/confini-planetari
- overshootday.org/content/uploads/2022/06/Earth-Overshoot-Day-2022-Nowcast-Report.pdf
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Introduction

Module Description/Presentation

The module is focused on practical approaches and tools that can be useful in the process of designing and develop ecomuseum. It refers to a sequence of stages and steps to be taken in the process of participative planning, from making a vision, carrying out diagnosis of situation, defining mission and goals, finding the solutions and determining necessary activities and tasks, developing action plan. Special attention was paid to the methodology of diagnosis and its tools. In the ecomuseum planning process it is worth including heritage interpretation principles and tools. The final part of the module enables to analyze various aspects of ecomuseum operation that have to be taken into account in the planning process to secure the ecomuseum sustainability.

The main goal of this module is to provide the necessary knowledge concerning development and sustaining of the ecomuseum including:

- planning process and methods to be applied in the development of an ecomuseum
- local community diagnosis to plan ecomuseum: process and tools
- principles of heritage interpretation
- ecomuseum management
- ecomuseum operation: activities, offer, deliverables
- ecomuseum development
- internal and external networking: barriers and benefits

Module Learning Outcomes

The main output will be the understanding of comprehensive development of an ecomuseum step by step. It will deliver models and examples based on ecomuseum Best Practices. It will deliver practical knowledge to be used in all stages of ecomuseum development.

1. Participants will know how to design and plan an ecomuseum basing on the diagnosis of the local community heritage, human and institutional resources
2. Participants will know the principles of heritage interpretation and to apply them in designing of an ecomuseum
3. Participants will analyze an ecomuseum management system basing on existing models
4. Participants will understand the diversity of ecomuseums
5. Participants will consider and integrate the development as a permanent ecomuseum process
6. Participants will analyze aspects of networking in the ecomuseum operation and development

Planning Process and Methods For Ecomuseum

Short Description

Understanding;

- Importance of planning in development of an ecomuseum (in the initial and advanced phases)
- Planning process –steps to be taken
- Methods to be used when carrying out the planning process

Planning is a sequence of steps, a method of achieving goals, a recipe for team work, vision of future that is to be implemented. Due to planning one can predict and avoid difficulties, seize the opportunities, realize the goal of activities, mobilize oneself for mutual undertakings, subordinating behaviors to proprietary objectives. One of important planning effect is making sure if there exists process possible to implement that will serve achieving goals.

The ecomuseum planning process will be always carried out in particular environment that is essential to understand, so this will have to always be the first step.

The planning process is defined differently by various specialists and consists of several steps. In case of an ecomuseum, it is important to start having a general vision before planning.

- **Making a vision of ecomuseum** (content, delivered knowledge and educational values, heritage to be interpreted, main partners, potential management system and financing). The incentive to create an ecomuseum could also be a defined issue, concerning maintenance of heritage.

There are two main approaches to planning, focusing on:

- **PROBLEM** – planning is subjected to define the problems and the whole process serves finding the solutions to solve them. Focusing on a problem might limit the plan to just finding the most simple method to solve it. However, in the process, one of the most important issue is to define problem well distinguishing its essence from its effect.
- **VISION** – planning is based on building a common vision in the defined aspect/area (local transport, village friendly to disabled people). In this case, the process is focused on defining needs and their best meeting. There should be no limitation and it stimulates imagination and unconventional solutions. In the process of planning ecomuseum this approach seems more effective.

- **Making diagnosis** of the natural and cultural resources, tangible and intangible heritage, infrastructure, potential partners. SWOT analysis (see more about making diagnosis in next module).

- **Defining the mission and goals** of ecomuseum creation

The ecomuseum mission refers to the change that the entity wants to introduce in the world and its values. Formulating the ecomuseum mission is the main step to then start defining specific goals, which will be the base for activities to be undertaken.

An appropriate definition of a goal is essential to their implementation. The SMART concept can help us to develop the ecomuseum goals. Its name stands for the first letters of five characteristics of well-defined goal.

S	⇒	SPECIFIC	The goal should be defined in unequivocal way, so no to raise doubts and its understanding is easy
M	⇒	MEASURABLE	Definition of the goal should make it possible to assess the degree of its achievement.
A	⇒	ACCEPTABLE	The goal should be understandable and accepted by all interested in its achievement and engaged in its implementation.
R	⇒	REALISTIC	The goal has to be achievable.
T	⇒	TIME BOUNDED	Its implementation should have specified time, until when it should be achieved.

All objectives should enable the achievement of ecomuseum vision. This is also a good moment to describe the general concept of ecomuseum.

• **Developing an action plan**

Well-defined objectives should be the base for the development of action plan.

OBJECTIVES	TASKS	SUCCESS CRITERIA	TIME FRAME	RESOURCES

The more specific is the action plan is, it would provide better guidelines for its implementation. It will have to be structured in concordance with the objectives, which will include a list of tasks in order to achieve it. The criteria to measure the success should arise from the well-defined objective and enable to assess its achievement. It is important to indicate the deadline to accomplish each task and to set the starting point in order to also define the implementation schedule. Every task implementation will require ensuring all kinds of resources needed e.g. physical, financial, human. In the case of more partners being involved, it is useful to define each task's leader, the person who will be the responsible for its accomplishment.

When working out the action plan it is important to define priorities and tasks must be analyzed taking into account their importance and urgency. It is important to specify which are those tasks that are the more relevant for the whole concept or to the accomplishment of other tasks. Some tasks might require significant financial outlays thus have to be postponed until the funds are raised (fundraising itself can also be a task in this case).

	URGENT	NOT URGENT
IMPORTANT	DO	SCHEDULE
NOT IMPORTANT	DELEGATE	DELETE ...or re-schedule

In order to involve local institutions, organizations, enterprises and people from local communities, the ecomuseum planning process should follow a participative approach. This planning should be based on meetings, workshops, field works – allowing an exchange of information, thoughts, ideas and generating new, often innovative approaches and means of implementation. Those conclusions taken from diagnosis should be used as a starting point.

Planning should not be limited to an initial phase of ecomuseum development as ecomuseum is a dynamic undertaking. Ecomuseum's operation, management and effectiveness should be regularly monitored and evaluated. The evaluation conclusions and recommendations should be the base for planning process and it can refer to the whole ecomuseum (some systemic changes) or selected aspects of ecomuseum operation and management.

Learning Unit 2

Diagnosis of Situation

Short Description

Understanding:

- diagnosis of situation and its role in designing/planning process in ecomuseum
- process of diagnosis – step by step
- Methods and tools of diagnosis
- What to diagnose in case of an ecomuseum? Diagnostic methods for ecomuseum

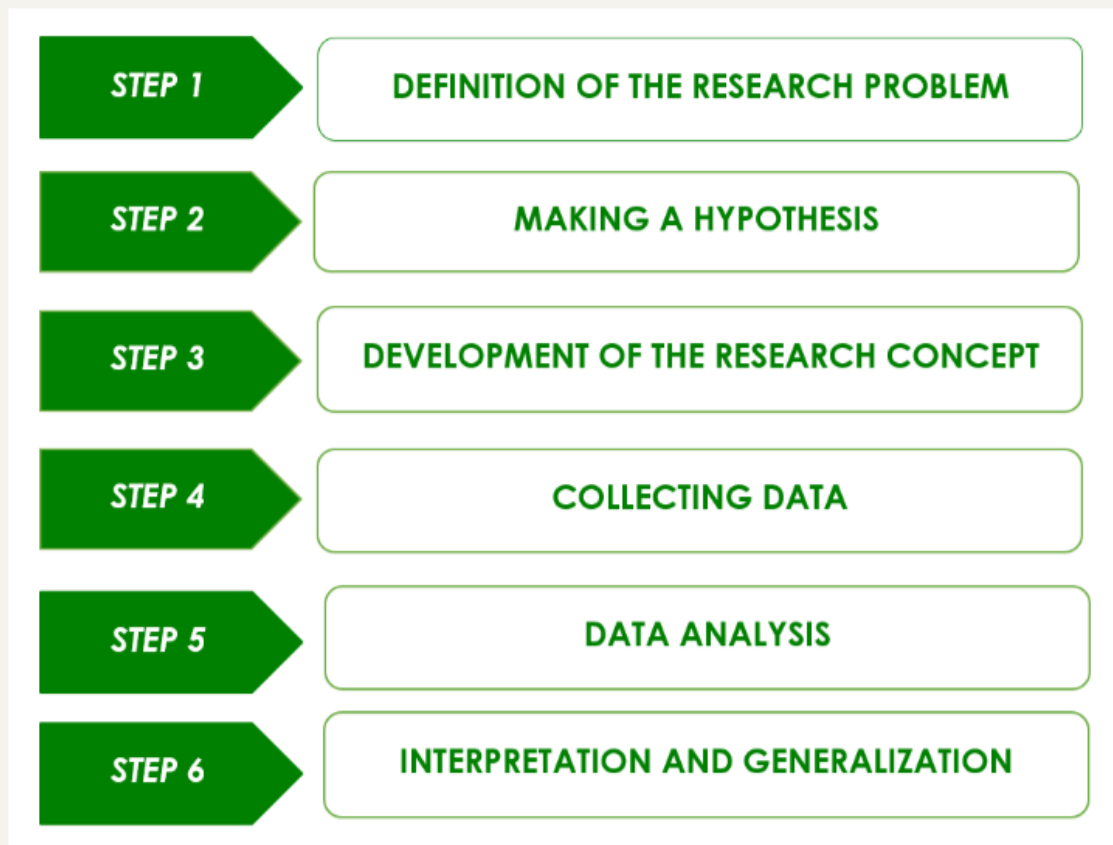
Diagnosis serves learning about the situation and assess possibilities of developing community and area aspects and solving problems including better understanding of its essence and causes. It allows to get to know diverse community opinions and views and gather ideas and suggestions of various people and institutions. It is a way to collect, analyze and interpret data. It is also a good opportunity to spread information about the idea of launching and developing an ecomuseum.

The ecomuseum diagnosis should include complex analysis of heritage potential, its specific characteristics, its state of preservation, elements that are endangered and resources that could be taken into account (e.g. infrastructure, its state of ownership). It is very important to see heritage widely and research into its natural and cultural aspects, tangible and intangible. It is important to design the diagnosis range and procedure in order to get key information and data to be used in making a project and developing an ecomuseum.

Diagnosis allows:

- to understand the situation and the perception of heritage by local community
- to involve people and gain allies to ecomuseum
- better determination of needs, competences, motives and possibilities
- to confront views and opinions with empiric data
- better use of resources and people's energy
- to follow trends, changes and processes.

The diagnosis consists of several steps:



Main diagnosis tools are:

- Analysis of documents (desk research)
- Survey research
- Interviews
- Observation

Documents Analysis

Documents analysis is the first step to understand the situation and prepare further research activities. All those documents that can be useful and deliver information important in the process of planning ecomuseum (reports, elaborations, articles, strategies, maps etc.) must be included in the analysis.

Survey Research

Survey research allows to collect quantitative data, get to know opinions, tendencies and attitudes towards heritage resources, their values, ideas to protect and maintain, potential. It is a good method to reach wider audience. There are various techniques to carry out the survey:

- PAPI (Paper and Pencil Interview) – pollsters lead interviews and register answers
- CATI (Computer Assisted Telephone Interview) – pollsters ask question by phone and registers answer on the computer
- CAWI (Computer Assisted Web Interviewing – on-line survey
- CAPI (Computer Assisted Personal Interview) – survey carried out in respondent's house.

One of the most difficult parts is designing the questionnaire in a way that questions are clearly understandable and useful to collect necessary interpretable data. Gathered information tends to be schematic and does not provide a completely cohesive picture, but do show the views shared by wider group of stakeholders.

Interviews

To deepen the knowledge and better understand the processes it is recommended to plan a series of interviews with a group of people who can deliver interesting points, new perspectives and throw maybe new light on the situation and possible direction in development of the ecomuseum. Interviews should be carried out according to the earlier prepared scenario, but this technique allows to introduce more questions and follow new ideas proposed by the interlocutor. Interviews are the source of qualitative data. Interviews can be led in two forms:

- IDI (In-Depth Interview) – individual, direct conversation with the respondent, it brings deepened answers
- FGI (Focus Group Interview) – interview carried out with several people in the same time according to specific scenario

Observations

Observation is a method of planned, regular watching phenomena and issues directly or indirectly related to the research subject or influencing it. It is often underestimated and overlooked as method of collecting knowledge. Nevertheless, it allows taking an objective look at the situation, unencumbered with any form of assessment or subjective feeling. It is important to carry out observations systematically, as thanks to that way tendencies can be distinguished from single events. *Collected information is reliable and have research value.*

During the diagnosis it is worth to:

- avoid excess of information and focus on the main objective
- use information to support hypotheses and better understanding of the situation and its possible changes
- use the knowledge of others
- consult gathered knowledge with community, experts and practitioners
- not to avoid conflicts, difficult and controversial issues
- keep being curious about the environment and people.

Data Analysis, Interpretation and Generalization

Collected data should be analyzed and interpreted in respect to the plan of ecomuseum development and the potential ideas and solutions set to achieve the goal. The results of the diagnosis are orderly conclusions and recommendations. All data in numbers and the most relevant opinions that were the base for the conclusions and recommendations should be presented in a diagnosis report. The diagnosis should enable e.g.:

- learn more about heritage resources
- see what local values are important for the community
- find out what people think about development of ecomuseum (they will have opportunities to learn what ecomuseum is)
- learn how the community can contribute to the ecomuseum.

Heritage Interpretation

Short Description

Understanding:

- heritage interpretation concept
- principles of heritage interpretation
- heritage interpretation process

Heritage interpretation is an educational activity which aims to reveal meanings and relationships through the use of original objects, by firsthand experience, and by illustrative media, rather than simply to communicate factual information – according to the definition of Freeman Tilden, who set down the principles and theories of heritage interpretation in his 1957 book *Interpreting Our Heritage*. His work with the United States **National Park Service** (NPS) inspired generations of interpreters across the world and continues to be a definitive text for the discipline.

Difference between heritage interpretation and information:

According to **Freeman Tilden**, “Information is not necessarily interpretation, however all heritage interpretation contains information”. Effective heritage interpretation is not about what you say to an audience, but rather the way you say or present it. Information presented to visitors is just that, straight facts; data, specifications, categories, figures and dates. Heritage interpretation is an objective driven, audience-focused process that accomplishes results. Interpretation uses marketing and advertising techniques, journalism strategies, and a host of other tools to deliver an interpretive outcome. Well executed interpretation is a fun, inspiring and motivating recreational learning experience.

The goal of interpretation is to improve and enrich the visitor experience by helping site visitors understand the significance of the place they are visiting, and connecting those meanings to visitors’ own personal lives. By weaving compelling, thematic stories about environmental phenomena and historical events, interpreters aim visitors to learn and think about their own experiences. Effective interpretation enables the visitors to make associations between the received information and their previous perceptions. Interpretation is often used by landowning government agencies and NGOs to promote environmental stewardship of the lands they manage.

In his 1957 book, “*Interpreting Our Heritage*”, **Freeman Tilden** defined the six principles of interpretation:

1. Any interpretation that does not somehow relate what is being displayed to something within the personality or experience of the visitor will be sterile.
2. Information, as such, is not interpretation. Interpretation is revelation based upon information. But they are entirely different things. However all interpretation includes information.
3. Interpretation is an art, which combines many arts, whether the materials presented are scientific, historical or architectural. Any art is in some degree teachable.
4. The chief aim of interpretation is not instruction, but provocation.
5. Interpretation should aim to present and address to a whole rather than just a part or phase.
6. Interpretation addressed to children (say up to the age of twelve) should not be a dilution of the presentation to adults, it should follow a fundamentally different approach. To be at its best it will require a separate program.

Interpretive communication or heritage interpretation communication is not simply a way of presenting information. Heritage interpretation is a specific communication process that is used to translate raw information, from the technical language of the expert, to the everyday language of the audience, in an inspiring and engaging in a way that leaves a lasting and profound change in the audience.

The interpretive communication process is much more than the provision of a few panels around a heritage site. Heritage interpretation communication is an all encompassing, and all embracing process that reaches deep inside people at a very personal and meaningful level and leaves a positive, long lasting impression that changes the way people understand and think about things. Heritage interpretation is a philosophy, a teaching technique, an engagement strategy and a management tool.

In trying to understand what interpretation is, it is helpful to look at a process model of interpretation. This process developed by the [HDC team](#) is known as the Veverka Interpretation Model or the Veverka Interpretive Process.

Mission And Objectives	The 'why?' What do you want your interpretative programs or services to accomplish?
Theme, Message And Stories	The 'what?' What is the main interpretative message you want the visitors to leave your program or activity with – and REMEMBER?
Visitor	The 'who?' Who is your target audience – anglers, boaters, school groups, local residents, heritage tourists, etc.
Media And Services	After you have decided on your objectives, your theme, and once you already know your target audience, you will need to relate to, the next part of the planning process. You now need to determine the method to present the program and accomplish your objectives. This might include: live programs, visitor center exhibit, interpretive panels, self-guiding trails, or other media/services.
Implementation And Operations	This part of the planning process is where you determine just what it will take to make the program or service happen. What teaching aides will you need to present program? Any handout materials or props?
Evaluation And Feedback	Part of the interpretative process involves evaluation to see if the objectives of your program were accomplished. There are several ways you can get feedback.

The following are 12 good reasons why heritage interpretation is a critical element in the success or failure of **heritage sites**

- Heritage interpretation demonstrates how a heritage site has value to the visitor.
- Heritage interpretation can inspire visitors and create a sense of individual and community pride.
- Heritage interpretation is the reason that visitors come to the heritage site. They pay good money for the story and site experience.
- Without heritage interpretation historic sites are, in the eyes of the visitor, just another OLD site!
- Heritage interpretation gets visitors to CARE about heritage.
- Heritage interpretation programs, events and services are the reasons visitors return to heritage sites.
- Heritage interpretation programs, events and services can increase visitation by increasing the perception of BENEFITS tourists receive by going to a particular heritage site.
- Heritage interpretation programs, events and services can produce reductions in site maintenance, and reduce negative management issues when used as a management tool.
- Well-designed heritage interpretation presentations and programs increases visitor dwell time increasing the need for catering and shop sales.
- Heritage interpretation provides added value to any heritage tourism experience, and heritage site marketing efforts.

Learning Unit 4

Ecomuseum Content and Management

Short Description

Models of ecomuseum management (management system, staff, financing communication)

Models of ecomuseum operations. What Ecomuseum deliverables in education, tourism, local development

The planning process should include various aspects of the ecomuseum operation and management and it should fit to local circumstances (e.g. heritage, human, institutional resources).

I. Content

The content depends on ecomuseum goals, heritage resources, infrastructure available, audience, education program, tourism offer.

I.1. Goals

One of the most important issues is the definition of the ecomuseum goals. They will determine ecomuseum's profile, development directions, activities, structure and management system. Goals depend on local situation and circumstances, heritage resources and their state, ecomuseum leader and partners. Below there is a selection of goals declared by ecomuseums.

EXAMPLES OF ECOMUSEUM GOALS

- Safeguard of heritage
- Interpretation of heritage
- Promote heritage in situ
- Support community economic activities
- Support school programs
- Promote tourism
- Consolidate and enhance local identity
- Organize collections
- Heritage handling to promote local development
- Offer activities
- Organize exhibitions
- Promote human rights and social inclusion
- Address societal challenges, local, national, international

Each ecomuseum should define its individual goals and mission. Even if they can seem obvious for the leaders, objectives and mission should be specified and written down.

I.2. Heritage resources

In the phase of diagnosis local heritage, resources are identified and analyzed. This is the starting point to design what resources will be the base for the ecomuseum and in what way they will be interpreted and shared. There is a wide range of tools and technologies to be used to interpret the heritage.

POSSIBLE INTERPRETIVE TOOLS

- Interactive workshops
- Demonstrations, tastings
- Hands-on activities
- Educational games
- Story telling
- Historical reconstructions
- Interpretive panels
- Self-guarding trails
- Exhibitions
- Ecomuseum lessons
- Lectures, presentations
- Guided tours
- Others

POSSIBLE TECHNOLOGICAL RESOURCES

- Multi-touch surfaces
- Interactive kiosk
- Mobile Guides
- Videos
- QR Code
- Interactive projections
- Games
- Sounds / sound information
- Augmented Reality
- Virtual Reality
- Virtual Ecomuseum
- Gamification

The choice of tools and technologies will depend on the character of heritage, human resources, funds, available infrastructure, target groups....

1.3. Audience

In designing ecomuseum it is important to define the potential audience. According to heritage interpretation, the message should be formulated and provided in a way that is relevant to the selected specific segment of audience.

Target group	Specific needs
Children	The program should be customized to various age groups considering level of their knowledge and skills
Youth	The program should be tailored in the way attractive to this group (e.g. challenging, including rivalry)
Seniors	The program should take into account potential limitations
Families	The program should encourage common activities, involving all family members
Local community	The program should include potential exchange and contribution
Foreigners	The program requires the communication in foreign language (depending on potential international audience) and additional information (historical and cultural background)

1.4. Infrastructure

Infrastructure includes all sorts of indoor and outdoor spaces that can be used for the ecomuseum purposes. Its diagnose should show the potential and needs. The next step is to assess which resources are ready to be used, which need adaptation or creation. The needs depend on the planned activities and character of heritage resources to be interpreted and shared.

Indoor infrastructure	The indoor space might be used for exhibitions, collections, library, workshop venue, training/seminars venue, meetings, administrations, film/presentations, theatre performance, archive, store etc. It could also include special purpose buildings (e.g. mills, smithies, castles, bakeries, factories, mines etc.) that can display maintained authentic equipped spaces.
Outdoor infrastructure	The outdoor space might include: gardens, parks, trails, educational paths, specific landscape, urban or rural layouts, monuments, cemeteries, archaeological sites, apiary, etc.

The interpretation and use of the existing infrastructure should follow the overall concept of the ecomuseum.

I.5. Human resources

Specific human resources are needed to develop the ecomuseum and its educational program. They include not only specialists in certain areas and fields, but also people with specific skills, practice, experience and talents. You can consult the ecomuseum program with internal and external professionals, but you will also need the local community to develop specific knowledge, skills and experience.

Specialists and researchers	This group includes a wide scope of professionals e.g. museologists, archaeologists, ethnographers, historians, regionalists, specialist in tourism and education (pedagogues) but also specialists in management and marketing. You can also cooperate with professional specialist in heritage interpretation. It is also important to have the special programs to cooperate with senior since they are depositaries of a disappearing knowledge, skills and experiences.
Local community	You have to search for local artists, artisans, farmers, producers, as well as people that cultivate local tradition, customs, music, songs, dances, games. It is important to cooperate with people that collect local stories, legends, fairy tales – maybe there are talented story-tellers. You can include local festivals, fairs and performances as well as cooperate with historic reconstruction groups.

The cooperation of various specialist, technicians, professionals and volunteers is necessary to deliver reliable educational values, knowledge, skills in attractive and involving way.

The ecomuseum evolution should be also focused on the development of human resources. The program should be based on systematic monitoring of needs and tailored according to them. Various methods and educational tools could be used:

Regular trainings – organized for ecomuseum staff and volunteers as well as participation in available training (paid or free of charge)

Online courses – there are more possibilities to participate in the online courses and seminars organized by a wide range of specialists (e.g. e-learning)

Guidance materials – access to all kind of professional literature and manuals

Online Training (e.g. webinar, tutorials, videos) – promote and encourage participation in various online trainings

Expert assistance in developing new projects – finding experts that can assist in new undertaking, esp. introducing innovative methods and approaches.

Exchange of knowledge and experiences – organization of study visits to museums and ecomuseum, organization/participation in conferences and seminars.

I.6. Tourism facilities

Additionally, the ecomuseum might cooperate with typical tourist services and facilities like accommodations, restaurants and caterings as well other in the area e.g. bike rentals. However, it is important that those places respect and promote local culture and traditions (e.g. use local resources, are environmentally friendly, respect local cultural landscape, offer local cuisine etc.).

II. MANAGEMENT

Management includes various aspects of the ecomuseum organization and functioning like: institutional character, decision-making process, human resources, communication, finance, relation to the community).

II.1. Institutional character

The institutional character depends on local conditions and possibilities. It can represent:

- a public body – institution responsible for ecomuseum operation (e.g. a museum – Ecomuseu do Corvo, Ecomuseu de les Valls d'Àneu, a municipality, a museum network – Rede Museológica do Concelho de Peniche)
- an association – in this case a new entity is established to manage the ecomuseum and it usually have the form of an association (Ecomuseo Casilino Ad Duas Lauros, Lis Aganis Ecomuseo delle Dolomiti Friulane) or social enterprise (Museu do Traje de São Brás de Alportel)
- private entity – an ecomuseum is established and run by private enterprise or people (e.g. family ecomuseum)
- informal collective – it can have a form of multisector partnership composed of diverse entities (public institutions, organizations, enterprises and people) that declared (membership declaration) to cooperate basing on common values and quality standards (e.g. Ekomuzeum Doliny Karpia, Ekomuzeum "Dziedziny Dunajca"). In both mentioned cases there is a leading organization (association) that support ecomuseum operation.

It is worth mentioning that Italy is the only country that worked out a specific law related to ecomuseum.

II.2. The structure and decision-making process

The decision-making process depends on the adopted institutional character and structure. As ecomuseum deals with community valuable heritage, it is important to use democratic rules and apply public participation mechanisms involving wider society in the process.

Ecomuseum structure might include:

- Executive board – responsible for the operational management of the ecomuseum
- Scientific council – advisory body, responsible for reliability and quality of the ecomuseum deliverables
- Work groups – responsible for the design and implementation of certain aspects of ecomuseum activities and development (e.g. trainings, promotion, public participation, networking, fundraising etc.)
- Fan clubs – gathering people interested in ecomuseum operation and ready to support.

Each ecomuseum might develop other structural units to make the operation and management system more efficient and effective.

II.4. Communication

Communication is one of the main important issues in the ecomuseum management. It should be well planned and systematically implemented. It includes internal communication (within the ecomuseum staff and all involved, e.g. volunteers), and external communication both with the community and the ecomuseum's audience.

Printed materials: leaflets, posters, maps, books, guidebooks,

Official website, mailing, blogs, e-guidebooks

Newsletter

Mobile app

Audio and video materials

Social media: Facebook, Twitter, Instagram, Pinterest, WhatsApp

Cooperation with bloggers, influencers, instagramers

Meetings, seminars, conferences

Networking

The list of methods, tools and channels is open and ecomuseums should adapt it to be relevant to the target groups and message to be delivered.

II.5. Finance

To manage financial issues, the ecomuseum should firstly define which are its permanent costs (e.g. staff, maintenance) and its occasional costs (e.g. events organization, training, issuing publications). It is essential to estimate necessary cost to plan fundraising and plan ecomuseum's budget.

The ecomuseum financial capacity depends on its status and structure. Ecomuseums differ between one another in this aspect. While some of them have permanent financing and a regular annual budget, others' operation is project-based and their budget can fluctuate periodically depending on their activeness and effectiveness. To have the budget based on projects means a great degree of independence for the ecomuseum but can be risky in case it is not effective in raising funds.

In general ecomuseums use diverse sources of finances:

External resources (grants, donations and subventions from various institution, organizations and companies)

Own resources (e.g. membership fees, income from delivering services and products)

Community resources (e.g. donations, voluntary work)

National competitive projects (grants)

International competitive projects (grants)

Resources under cultural patronage laws (subventions)

The Ecomuseum is dependent on an external institution (public or private)

II.6. Relation with the local community

In the process of planning the ecomuseum development, one important issue is building and maintaining relations with the community. More about this aspect of ecomuseum operation is presented in the module Participation and active citizenship. Participatory Processes.

II.7. Internal and external networking

Ecomuseum operates in a certain area, which can limit its knowledge about other ecomuseums models, solutions, ideas, innovative methods and tools. This knowledge and skills can be developed and raised through participation in networks. It serves well exchange of experiences and build the communities of ecomuseums on various levels (regional, national, international). To start with, the ecomuseum can launch or participate in local networks of entities (public, private, social) to encourage local cooperation. Next step is to start cooperation with other ecomuseums or similar initiatives in the region and country. If there is sufficient capacity, in time partners might decide to establish a network (it is recommended to have an entity ready to play the role of a leader/coordinator of the network). But you need to be aware that participation in network is not only profitable, but it also demand extra work and engagement and ecomuseum needs enough capacity to be part of a network.

A network of local institutions / associations

Ecomuseums network at the regional level (e.g. Ecomuseum Network in Lombardy)

Ecomuseums network at the state level (e.g. Fédération des Écomusées et des Musées de Société, Italian Network of Ecomuseums)

International network (e.g. international platforms EEON, DROP)

A good example of a network is the French network – Fédération des Écomusées et des Musées de Société (<https://fems.asso.fr>) which gathers 139 members representing ecomuseums, community museums and interpretation centers. Another example is Italian Network of Ecomuseums that has published The Strategic Manifesto of Italian Ecomuseums in 2017

There are also platforms dedicated to ecomuseums to foster and encourage their development, cooperation and exchange between them:

- European Ecomuseums Online Network – EEON (<https://ecoheritage.eu/european-ecomuseums-online-network-eeon/>) developed thanks to EcoHeritage: Ecomuseums as a collaborative approach to recognition, management and protection of cultural and natural heritage
- DROPS World Platform for Ecomuseums and Community Museums (<https://sites.google.com/view/drops-platform/home>)

It is important to carry out systematic and detailed ecomuseum planning proces in participatory way:

- It allows to identify well the heritage resources in a comprehensive way and assess their state and needs too improve and sustaine
- It involves various stakeholder and representatives of the community
- It assesses the potential and capacities, define challenges and barriers
- It servses creation of ecomuseum vision
- It leads to determin the activities and tasks to achieve the goals (implement the vision)
- It attracts people appreciating heritage and fosters cooperation
- It allows defining needs: social, financial, qualifications, organizational etc.
- It brings the best solutions to protect, maintaine and present the heritage
- It develops education program that can raise the awareness of local natural, cultural and historic values and enhance the sense of identity and pride
- It leads to estimate and plan financial sources to ensure necessary funds to sustaine ecomuseum.

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- **DROPS World Platform for Ecomuseums and Community Museums** (<https://sites.google.com/view/drops-platform/home>)
- **Social Research:** <https://www.questionpro.com/blog/social-research>



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Participation and active Citizenship. Participatory Processes

Introduction

Module Description/Presentation

An ecomuseum is an experience with an aim to generate social engagement among the inhabitants of a community through participation strategies and processes activation. **From the point of view of ecomuseology, participation consists on providing individuals and communities the opportunity to take part in decision-making processes without intermediaries**, fundamentally in local policies and in those issues affecting their lives. In this sense, participation is the citizen's assumption of his political power, not its replacement, but the creation of structures of direct (cultural) democracy.

Nevertheless, the concept of participation is as fragile as powerful, as resilient as manipulable and permeable and as unique as ethereal. It is as polyphonic a concept just as community or citizenship concepts are. Communities are diverse and so are the ways of understanding participation, its levels and the methodologies for applying it.

The main objective of this training module is to understand the meaning of participation in the creation and management of ecomuseums. For this purpose, the module is structured around four essential questions:

1. *What is participation?*
2. *What types and levels of participation exist?*
3. *Who are those agents involved in participation?*
4. *What is the process of participation?*

The aim is to develop and deepen the mechanisms that allow communities to be one of the main agents in the decision-making for development towards the future. To this end, emphasis will be placed on concepts such as citizenship, community and participation from the point of view of the New Museology and sociomuseology, on the forms of organisation of civil society, the scales of participation and the methodological possibilities for implementing it.

Module Learning Outcomes

Competences students should acquire:

1. Possess and understand knowledge of participation and citizenship.
2. Understand the different types and levels of participation.
3. To be able to know and handle the main methodologies of community participation.
4. Develop the capacity to innovate in the strategies and methodologies of community work.
5. Apply the knowledge acquired, as well as participatory processes.
6. Capacity to monitor and evaluate the community engagement strategy.

Participation and Ecomuseology

Short Description

This unit corresponds to the question of **what participation is**. The aim of this unit is to understand and analyse the idea of community and participation in ecomuseums. To do so, we will look in depth at how ecomuseology understands the idea of participation and community processes.

Participation from an ecomuseum point of view

Citizen participation in the field of heritage, museums and culture can be understood in different ways and with different scales depending on the scope that one population can have in cultural actions and planning. In our case, we will understand it as **the involvement of citizens and civil society in the design and development of policies and in the empowerment of decision-making**.

The involvement of citizens and civil society in policy-making has grown over the last decades. This is not a new phenomenon. Since the end of the Second World War and the democratisation of culture, unilateral policies have been disappearing. Today, every individual expresses himself or herself through participation, its essential pillars are:

- *Participation is not open to question. Its model, scope and processes can be questioned, but participation has become a "right" derived directly from a democratic state.*
- *Participation is a social fact. To participate is to build society and this leads to cultural construction. Participation, in relation to the first point, is a democratic act.*
- *To speak about participation means speaking about multiculturalism. Our societies are not watertight or closed homogeneous human groups – and they have never been- but a tangle of social and cultural interconnections in continuous movement.*
- *Culture management is participation management. Cultural management (where museums come in) is the management of people, of citizenship.*

In order to assume these premises, we must bear in mind that the concept of culture today and from which ecomuseology is based: (1) is a complex, social process that depends on numerous factors, in some cases random; (2) is immersed within neoliberal and market dynamics, which means that it is directly or indirectly commodified; (3) is a contradictory territory that is in continuous tension between the new and the old, national identity versus group identity, intellectualism versus the popular, what is lost and what is preserved, etc., that is to say, culture does not stop; (4) and it is a contaminated concept and sector, since it is closely related to the immersions of economic, educational, political factors, etc. (Based on López de Aguilera, 2000: 23-24).

Participation as a citizen's right

Citizen participation in the elaboration, implementation and evaluation of political decisions is therefore no longer a mere option, but a feature of today's democracies. Indeed, citizens take on public responsibilities voluntarily with the aim of improving their social, cultural and economic situation. Beyond theory, however, the reality is somehow more diffuse. As shown in one of the latest studies on participation in Europe ([BBVA Foundation's European Mindset Study for 2010](#)), the level of political and social participation in Europe is relatively low as a whole, although there are important differences between countries. In 2010, 34% of Europeans carried out some form of political and social participation activity, such as signing petitions, taking part in demonstrations, mobilisations, etc.). Sweden and Denmark achieved the highest levels of civic participation, over 55%, while Bulgaria and Portugal, with less than 20%, were at the bottom of this ranking. The data are similar if we look at membership of associations. Danish and Swedish societies reach figures of 70% in terms of participation in civic groups and associations. The countries with the lowest participation rates were Bulgaria, Poland, Turkey and Greece (with less than 20%).

These data leaves us with a gap between a theoretical part of what democratic and participatory societies are or should be, and a part of reality where people's awareness of the right to participation and its processes is negligible. Post-industrial societies still face the challenge of truly internalising participation in order to maintain – if not build – a welfare society, one involved in public affairs. One of the main examples of the actual use of the right of participation and a demonstration of an assumption of the social role of citizens in *public affairs* is the "Icelandic revolution" of 2008-2011, where a society that forced the resignation of a government, put those responsible for the crisis in the dock and decided by itself to refuse in a referendum to accept the conditions imposed on them for the payment of the debt accumulated by their banking companies.

As mentioned at the beginning of this unit, participation is not "questionable", but its definition, implications, develop and impact on the reality of a territory and its social, cultural and economic conditions is wide and diverse. Nor can we blame the lack of participation on an administrative and governmental system that impedes this right. It is not that the administrative and legal frameworks do not allow participation, but rather that citizens do not demand it, which leads to a delegation of these functions to the administration. This dynamic constrains administrations in standardised and bureaucratic processes, for which breaking out of them means introducing innovative measures and "risky" political decisions.

Participation from the point of view of ecomuseums will strengthen innovation processes within the established dynamics of governance, recovering spaces for citizen involvement and, of course, for dialogue with political representatives and public administrations.

Learning Unit 2

Types of Participation

Short Description

This unit corresponds to the question of **what levels and types of participation exist**. The unit is aimed at analysing the different types and levels of participation that can be developed with citizens and communities.

Objective and goals of participation

We have seen that the concept of participation is polysemic and malleable. We talk about social, cultural, political, community participation, etc., without being exactly clear about the limits between one and the other, and without being able, therefore, to define them beyond the pretensions and interests of those who have decided to make one or the other taxonomy.

In our case, we will always refer to participation in the field of culture, which obviously has social and political implications. As we saw in Unit 1, our sense of participation is ultimately aimed at empowerment, the breaking down of hierarchies and decision-making by the civilian population.



Illustration 1. Objectives of participatory approaches. Source: own elaboration based on Delargue, 2018: 162-163.

All participation means should aim to generate processes that help ecomuseum organisations to address the needs and issues of their communities and territories, and to be able to adapt and face the challenges of today's societies: social justice, gender equality, social inclusion, coloniality, etc. We understand that participatory processes aim to build audiences of citizens capable of thinking and acting (Delargue, 2018: 162-163).

Types of participation

In the history of ecomuseums, participation has always been one of their defining banners and proclamations, together with concepts of 'community', 'territory' or 'heritage'. However, this has not meant that all ecomuseum and ecomuseum professionals understand participation in the same way. We could divide the understanding of participation in ecomuseological processes into 'participation to legitimise' and 'participation to transform'.

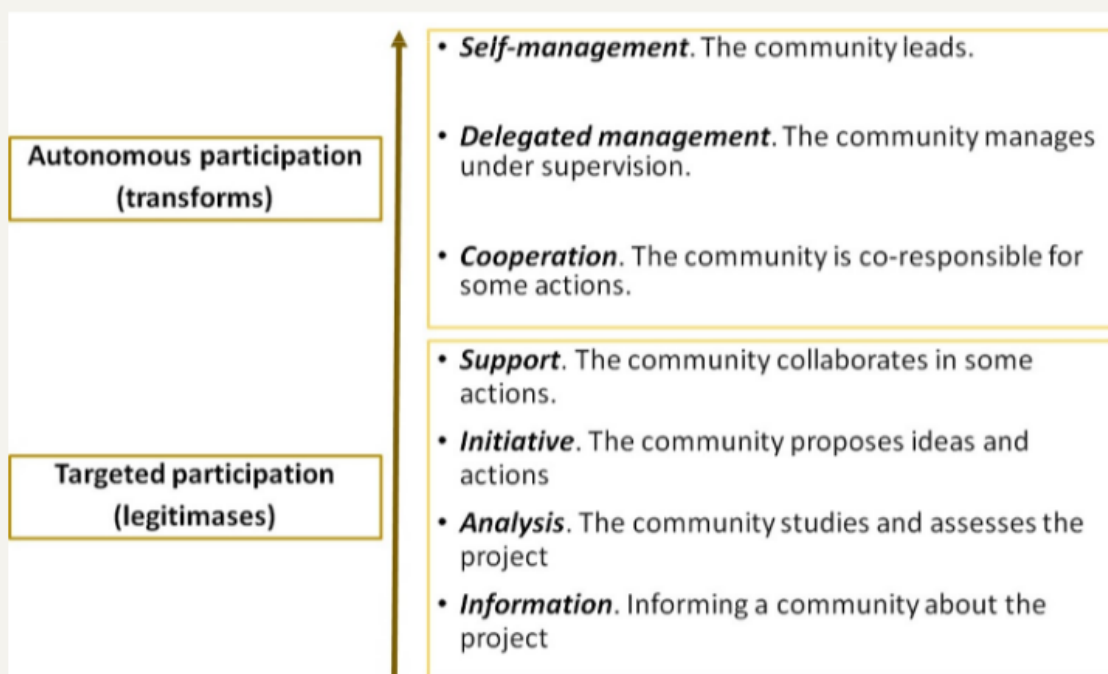


Illustration 2. Types and levels of participation. Source: own elaboration based on Rowan, 2016; Varine, 1991; and Ventosa, 2002.

Participation for legitimisation is based on directed processes where there is an entity guiding the participatory actions and the population is the recipient of these actions. This category can be divided into:

- **Information.** This is the most basic level of participation. The community is informed about the project and the actions to be carried out.
- **Analysis.** The community studies and evaluates the projects, actions and activities. Not only is information provided on what is to be carried out, but also qualitative and quantitative primary sources are generated in order to ascertain the population's opinion.
- **Initiative.** The community proposes ideas and actions. At this level of targeted participation, the population is invited to meetings and workshops (focus groups) to get their opinion in situ and to take their opinions and comments into account when planning and implementing the final project.
- **Support.** The community collaborates in some actions. In the last link of targeted and legitimising participation, the aim is to actively involve groups and associations in the implementation of activities and actions.

Transformative participation is based on the protagonism of the population and its social organisations in the planning, execution and management of the different actions. This type of participation can be subdivided into:

- **Cooperation.** The community is co-responsible for some actions. In this case the community is involved for cooperation in the different tasks under the technical advice of specialists.
- **Delegated management.** The community manages under supervision. One of the ways of raising awareness among the population and involving them in decision-making and heritage and territorial management is through co-management or delegated management of community spaces. At this level, collectives, associations, agents and/or the community have full freedom of action.
- **Self-management.** The community is the leader. This is the ultimate level of community participatory management. At this level, the community leads the processes, planning and management of actions and activities. It is considered the level of democratic pact and horizontal dialogue between the actors (public and private) and the community.

In managing the participation of ecomuseums, we will always assume that the ultimate goal is to achieve a status of autarky, i.e. the level of participation of "self-management" or, failing that, that of "delegated management".

Learning Unit 3

Social organisation and Spaces for Participation

Short Description

This unit corresponds to the question of **who participates**. The aim is to analyse and understand the spaces of representation and the power of civil society. If ecomuseums were framed in a specific global context: the sixties and seventies of the twentieth century; the drift of postmodernity has caused social dynamics to evolve and transform. Thus, we will deal, among other aspects, with the agents involved and the collective organisations, the spaces of co-management or the commons.

Citizen participation and accountability

Up to this unit we have talked about what participation is, its typologies, levels and what is considered participation for ecomuseums, but: can we participate, and what implications can and/or should this participation have?

The existence of a solid civil society, which is actually the backbone of democracy, marked by a concern for human solidarity, is a must for the participation of the type we have been previously developing. This means participation in local cultural spheres through participatory techniques, restricting the role of experts and inviting the population and citizens directly affected by the issues to be addressed (Mayrand, 2004; Varine, 1989, 1991 and 2017).

Participation has always both a reason and an objective. It is up to the members of the community to identify the needs and problems of their environment and society and to take the lead in addressing them. To this end, we understand participation as an act of citizen responsibility and an act of direct democracy as opposed to delegation. Hugues de Varine explained it as follows:

“Everything that happens in our daily lives is as if we had abdicated our social responsibilities to specialists trained for this purpose (...). It follows that all fundamental decisions are taken outside of us, while their implementation is the subject of rules that are imposed on each other (...) for our own good. They tell us how to live and die, how to conduct our relations with others or with the environment, how to consume, how to work, how to use our free time. They protect us from ourselves and from others, from environmental risks, and even from the unexpected”
(Varine-Bohan, 1991: 17-18).

Participation in the management of public affairs is a right of citizens beyond their participation as voters of political representatives. The social role of an individual – the social time that this individual consecrates – depends on the degree of consciousness in the sense, as understood by Paulo Freire which refers to the capacity to exercise a consciousness of mastery of oneself, of one’s present and future, of no longer being an object, but the subject of one’s development and of one’s human condition (Varine-Bohan, 1991: 75). This participation understanding as a way of self-managing personal time is directly linked to the right to culture and cultural freedom of the Universal Rights (UNESCO, 1948). **Cultural freedom is achieved in an individual through a process that links emotion with critical knowledge**, and each individual with his or her territory. We would even dare to say that an individual responsibility is undoubtedly necessary to conquer these freedoms.

Spaces for participation

Where can citizens exercise their right to cultural freedom? **Where can citizen participation be exercised?** In ecomuseology, participation is realised by considering heritage spaces as communal. Communal spaces belong to the theories of the commons:

“When we say that everything that belongs to everyone and to no one at the same time belongs to the commons, we are thinking of a good that is taken out of the market and that, consequently, is not governed by its rules. The commons cannot be assimilated to the notion of merchandise. This is also what happens with heritage, made up of all those goods (paintings, books, archaeological remains, and also rocks or plants) that we preserve in museums, libraries or botanical gardens”
(Lafuente, 2007: 15).

Collective property is still alive and well in current legislation. For example, article 132 of the Spanish Constitution states that the law shall regulate the legal regime of communal property, inspired by the principles of inalienability, imprescriptibility and non-seizability. Why can’t cultural heritage be regulated as a common good? This **could contribute to the creation of horizontal and democratic political decision-making bodies**, supported in their management by different social agents and institutions: heritage technicians, jurists, the Church, citizens, etc.

One solution is to facilitate the shared management of this heritage with civil organisations pursuing social goals and with companies in the social economy sector. A change in the definition of heritage, not as a public good, but as a collective, common good, could help to facilitate this process. The difference is that the former belongs to the state and the responsibility for its management lies exclusively in the administrations. The second belongs to a “community” that takes care and makes use of it; it is not only public (shared), but also common, and this makes it necessary to establish consensual management formulas, opening up participation to more actors: the citizenry, through associations, neighbourhood councils, foundations, cooperatives, etc. This heritage is inalienable, as were, for example, the communal forests. In this way, any income generated will always be reinvested for social and non-profit purposes. If there is any use, it will be by some kind of organisation, foundation or local community, which we can group together under the name of “social enterprises of culture and knowledge”. In contrast, the privatisation of the public sphere, which is the solution proposed by the current neoliberal agenda in the face of the state debt crisis, results in the exploitation of collective resources for purely profit-making purposes, in which local communities do not usually participate as active subjects. We are talking here about the so-called “cultural industries”, in which culture is treated as a mere object of consumption.

For all these reasons, we believe that it is essential to set in motion experimentation and social innovation processes configured as “**social enterprises of knowledge**”. This means that we understand the spaces in three dimensions: (1) as “enterprises”, because they are managed following an economic rationality, as a development for the community; (2) “social”, because they are based on a community management model and do not pursue profit-making ends; and “knowledge” because science and technology are central to the research process, and as Rivard and Mayrand pointed out, it is a process of Critical Culture, in which technical and academic knowledge converge with community knowledge. All this provides us with a propitious scenario to consider community participation in ecomuseums as a “laboratory”, “conceived, implemented and led by a civil organisation. We are therefore talking about technology and innovation, but not of a “technological base”, but of a “social base”, civic, locally anchored and open. The aim is to make heritage the central argument around which all these processes of social innovation are set in motion” (Fernández, Alonso and Navajas, 2015: 118).

Learning Unit 4

Participatory Process

Short Description

This unit corresponds to the question of **how participation is done**. The different steps to develop a participatory process will be explained.

Participatory planning

We define all participatory planning processes as a strategy aimed at promoting or enhancing the impact and involvement of citizens in public policies. We must bear in mind that the starting point of citizen participation is not methodological (how to carry it out) but political (what it is to be promoted for) and that it entails values (political aims) generating an educational process for society. Let us recall at this point that from an ecomuseological point of view, participation is not an option, but the *raison d'être*.

The purpose of a participatory planning process is to establish communication links between the different community agents (public and private) and the community itself, to establish a space for democratic decision-making that serves to build a common future, and to generate awareness and co-responsibility between the agents and the community for territorial and community management and development. It is about a process of community autarchy and that it is the community that is part of the decision-making process that involves future policies.

One of the ways to carry out the process of participation planning is through the following five phases

Phase 1: Why and for what purpose do we carry out the participatory process?

In community management, and specifically in the creation of ecomuseums, it is essential to ask ourselves the reason why we wish to generate a process of community participation. Community ecomuseums are entities that start from the idea of transforming the social reality in which they are inserted, alleviating the needs and problems that are diagnosed in the territory. Hence, the “what for” becomes a transcendental question in the ecomuseological project. A long-term project, whose goal is territorial and community development and which involves a community in all aspects of it, should not be limited to a short-term vision or to goals aimed at the traditional atomisation of the management of heritage assets.

In this first phase, a promoter group should be created, composed of those members of the community and agents who promoted the eco-museum initiative and also of those who wish to establish the main objective and the goal to be achieved in the participatory process.

Phase 2: Who will (and who will not) participate in the process?

Once we have objectified and focused on the final goal of the participatory process, it is necessary to establish the actors who will intervene. Since its beginnings, ecomuseological theory has established that ecomuseums are a pact between the different public and private agents and the population itself (Maggi, 2004 and 2006), which means that the population must form part, together with the technicians, of the different working groups of the ecomuseum, from the planning of the activities to the execution, management and evaluation (Mayrand, 2004, Varine: 1991 and 2017).

Of course, we must move away from utopian assumptions that the whole population will participate. When we talk about community we are really talking about communities, just as when we talk about participatory process we are really referring to a multiplicity of processes that can either involve the whole population or different groups within the community (youth, adults, women, etc.).

Depending on the purpose established in Phase 1, informative meetings, discussion groups, collaborative workshops should be set up in order to detect the agents and members of the population who wish and will participate, as well as the characteristics of their participation: knowledge, time of dedication and commitment, etc. It is important to remember that these active members will also be the final recipients of the actions developed.

Finally, "non-participation" must be taken into account. The actors and members of the population who are reluctant to participate in the project or to participate are a crucial sector to consider the parameters of the participatory project and what are the circumstances that lead them to non-participation.

Phase 3: How are we going to do it?

The participatory planning process can concern the whole ecomuseum project (see module 3), or specific actions and activities. Depending on the different actions to be carried out, a different methodology will be established. The methodologies to be used are developed in unit 5 of this module.

Phase 4. When and where are we going to carry out the participatory process?

The methodology established in Phase 3 of the process will indicate the times and spaces necessary to develop the participatory process. For time planning, it is recommended that a chronogram of actions, objectives and agents in charge of carrying them out be drawn up. This will allow us to control the actions and the execution process. Tools such as the **Canvas** are favourable for having a global vision of the planning.

In terms of spaces, we must consider those locations in the territory that are favourable for the development of the actions and that in some way are linked to the identity of the population. Likewise, dialogue and collaboration with public and private agents is key in order to have access to a wide range of spaces. The choice of the physical spaces where the participatory process will take place is of enormous importance in the response and dynamics of the people who participate, as they will be spaces of identity and collective memory in the future.

Phase 5: What resources will we use?

Any participatory process results in the use of a specific methodology of community action, which ultimately implies the allocation of resources to carry it out. Access to or availability of different resources will condition the participatory process itself, but not its essence or the purpose set out in Phase 1.

We need to define quantitatively the following aspects:

- **Personnel.** Technical staff needed to advise and monitor the participatory process.
- **Financial resources.** Establish possible sources of funding and/or alternatives for the implementation of the project if it is non-existent or insufficient.
- **Technologies.** Technological elements and devices, as well as digital actions necessary according to the methodology to be used.
- **Material resources.** Plan all consumable and inventoriable materials necessary for the implementation of the participatory process.

Participatory Methodologies

Short Description

The last learning unit follows the line of the previous one and focuses on developing and explaining the various **participatory methodologies**: Participatory workshops, Citizen Labs, etc.

Participatory and collaborative workshops

Workshops are spaces for contrast and debate and are also frameworks for the construction of collective identity, especially thanks to the older members of the community. Conceived as a spaces for sharing knowledge through the experience of the components of the community, these workshops will serve to recover and enhance, from a participatory perspective, the direct knowledge of the members of the community group. Workshops are spaces for contrast and debate and also frameworks for the construction of collective identity through the exercise of oral memory, especially thanks to the elders of the community.

Community

Exhibition is an essential instrument to present heritage and investigate new languages and museum techniques. With a view to the further development of an ecomuseum, the exhibition is positioned as one of the most useful methods of heritage appropriation and dialogue between the community and the technical-specialists. Exhibition initiates the process of community action that leads to heritage awareness and the construction of an identity through which the community becomes involved in making decisions about its future and that of its territory. In conclusion, the (community) museum space becomes a social and cultural laboratory. In short, an exhibition is a knowledge and communication strategy which, from a community point of view, is a method for sharing, collaborating and participating with the members of the community. It should, therefore, generate more questions, interrogations and dialogues than answers and closed narratives.

Participatory Diagnosis

Participatory diagnosis is one of the tools assumed as essential by most ecomuseologists (Pierre Mayrad, Raul Méndez, Hugues de Varine, etc.), but it is also more complex. Diagnosis should be one of the initial phases in the creation of an ecomuseum, since it involves researching, analysing and reflecting on: the territory, heritage, cultural identity, problems and needs of the territory and the community. In administrative and business terms, we would be faced with a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats and Strengths) and a PEST analysis (Policy, Economy, Society, Technology); however, in the case of ecomuseums, this must be done in a collaborative and horizontal way. Technicians and specialists must interact with the population and involve them in order to carry out a truly effective diagnosis.

Community Maps / Parish Map

The direct antecedent of community maps can be found in the **Parish Maps**. The Anglo-Saxon version was exploited by ecomuseums following the ideas of heritage for life of Hugues de Varine (2017) and Pierre Mayrand (2009). Community mapping or, if preferred, community inventory is the main tool for local communities to become aware of their own territory and their heritage. It is also one of the preliminary steps for the interpretation of the heritage of the territory of the future ecomuseum.

Participatory – Action – Research

Participatory – Action – Research (PAR) is a tool that aims to enhance the participation and collaboration of community members in actions aimed at transforming the community. This implies that people should be an active part of all intervention processes, as well as in decision-making. This type of research aims to take into account social needs and problems, but whose actions are carried out by citizen initiative. Its methodological and theoretical roots are to be found in the pedagogical processes of Paulo Freire, in the militant sociology of Orlando Fals Borda, in community development and in the Critical Culture of the New Museology and Sociomuseology presuppositions.

Co-creation

Co-creation is a form of shared project management. Its purpose is based on collaborative innovation. This concept is based on sharing ideas with local collectives and associations with the intention of **generating shared and inclusive projects**.

Educational and social action laboratories

Spaces for collaborative work, developed by technicians, professionals and social and community entities. The main objective is to generate pedagogical material with a vision of social inclusion, responsibility and commitment to the most vulnerable or the least represented, especially in the activities developed by the museum. To this end, cooperation with (local) **social agents is essential**.

Citizen's Lab

A citizen laboratory is a collaborative space for the production, research and dissemination of cultural projects. These laboratories explore forms of communal learning, innovation and experimentation. The aim is to start from an idea that can be developed in a communal way and that **has a direct impact on the social reality**.

Citizen labs are based on generating proposals from citizens, with the addition of collaborators; this generates prototypes and learning communities. The entire process of a citizen laboratory is documented (with an open licence) so that it can be used by other communities: researchers, producers, other citizen initiatives, administrations, etc.

METHODOLOGY	LEVEL OF PARTICIPATION
Participatory and collaborative workshops	<ul style="list-style-type: none"> • Cooperation • Support • Initiative
Community museography	<ul style="list-style-type: none"> • Self-management • Delegated management • Cooperation
Participatory Diagnosis	<ul style="list-style-type: none"> • Self-management • Delegated management • Cooperation • Support
Community Maps / Parish Map	<ul style="list-style-type: none"> • Self-management • Delegated management • Cooperation • Support
Participatory - Action - Research	<ul style="list-style-type: none"> • Self-management • Delegated management
Co-creation	<ul style="list-style-type: none"> • Self-management • Delegated management • Cooperation • Support
Educational and social action laboratories	<ul style="list-style-type: none"> • Cooperation • Support • Initiative • Analysis • Information
Citizen's Laboratory	<ul style="list-style-type: none"> • Self-management • Delegated management

OBJECTIVES:

- Give everyone a voice.
- Building citizens who are able to engage, think and act.
- New themes and diversify the sources of knowledge, listening to and taking into account all citizens, in their great diversity.
- Create dynamics of action around heritage.
- Build strong social relationships within communities.
- To constitute communities of thought, i.e. "forming a society".

Source: own elaboration.

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Páginas web con proyectos

- La Ponte-Ecomuséu: <https://laponte.org>
- Proyecto europeo Ecoheritage: <https://ecoheritage.eu>
- Observatorio de experiencias social y comunitarias HESIOD: <https://hesiod.eu/es/>
- Museo Montes de María: <https://mimemoria.org/>
- Museu de Favela : <https://www.museudefavela.org/>
- *Huelva te mira*: <https://www.facebook.com/huelvatemira/>
- Centro social Rey Heredia: <http://185.198.182.77:8086/>
- Universidad rural – Ecomuseo Alma Serrana: <https://lugaresmiticosdejaen.com/es/articulos/lugares/ecomuseo-alma-serrana>
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