European Commission

COVER PAGE

SoPHIA – Social Platform for Holistic Heritage Impact Assessment

SECTIONS 1-3

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List of participants

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5	National Technical University of Athens - NTUA	GREECE
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1.   EXCELLENCE
1.1   Objectives

The general assumption on which our proposal is based is that, since the second half of the last century, culture, including cultural heritage, has experienced a profound mutation through which both its position and role in social dynamics have been transformed. Indeed, it has been widely recognized that culture and cultural heritage have strong impacts on society, in terms of social inclusion, integration and sustainable human development.

A fundamental document, among many others, that acknowledges the social value of cultural heritage is the Council of Europe's *Framework Convention on the Value of Cultural Heritage for Society*, called the Faro Convention, which came into force on 1 June 2011. This document is a milestone for the understanding of the role of cultural heritage in contemporary society: starting from the concept that the use of cultural heritage falls between the rights of the individual to come into the cultural life of the community and enjoy the arts, as enshrined in the Universal Declaration of Human Rights of 1948, the Faro Convention represents a step forward since it enables citizens and communities to play an active role in recognizing the values of cultural heritage and invites States to promote participatory processes, based on synergies between public institutions, private citizens, associations.

The main innovative element of the Faro Convention is precisely that it shifts attention from the object - cultural heritage - to the subject, citizens and community: art. 12 of the Convention in fact affirms that the parties undertake to "take into consideration the value attributed by each patrimonial community to the cultural heritage in which it identifies" and "to promote actions to improve access to cultural heritage, in particular for young people and disadvantaged people, in order to raise awareness of its value, the need to conserve and preserve it and the benefits that can derive from it". Indeed, the Convention sees in the participation of citizens and communities the key to increase awareness in Europe about the value of cultural heritage and its contribution to well-being and the quality of life. Its key points are, therefore, the notion of cultural heritage as a common good; the definition of "community of inheritance" and the concept of value as a social construct. Regarding the first point, the term "common good" describes a specific "good" that is shared by and beneficial for everyone - or for most - of the members of a given community. This also applies to cultural heritage that, ultimately, belongs to humanity and is preserved for future generations. Water, air, environment are "common goods" in a global sense, but the historic centre of a city, a monument, a local museum, a public garden, a landscape, are "goods" that benefit specific communities and can be key elements for local development, helping to improve the quality of life of that community and producing integration, social cohesion as well as a sense of belonging. The second point concerns "heritage communities", which the Convention defines as "a group of people who attribute value to specific aspects of cultural heritage, and who wish, in the framework of public action, to support them and pass them on to future generations". It is clear that the concept of "community" can be understood in a broader sense but it is anyway closely linked to the notions of access, participation and representation. As for the third point, communities play a fundamental role in the valorisation of heritage since - through participatory processes - they consciously appropriate the values which are connected to it, redefining them: in fact, the concept of "value" is a socially constructed concept that changes over time and which depends on historical, social and cultural factors. A further strengthening of this concept passes through the 2015 UNESCO Recommendation , in which cultural heritage is defined as a set of material and immaterial values recognized by the populations, key actors of the processes in identifying what heritage is.

It is with these premises that this proposal aligns itself with the Topic "Social platform on the impact assessment and the quality of interventions in European historical environment and cultural heritage sites", by taking into consideration the "public value of culture" in all its multifaceted and multidimensional nature and, therefore, the impacts and consequences that interventions on cultural heritage can cause on societies, their identities and their well-being.

While in the past interventions on cultural heritage were assessed and evaluated mainly for their technical quality, from an engineering and architectural point of view, the above mentioned changes in the perception of the value of culture have called for a multidimensional assessment that considers also consequences of cultural interventions on the social, cultural, economic and environmental dimensions of public life and societies, including the analysis of the role of new technologies and digital interventions on cultural heritage.

In this framework, it is necessary to ensure that interventions in cultural heritage at local, national and European level have positive impacts on all dimensions of society and, consequently, to support cultural operators, practitioners, academics and policy makers to, on the one hand, identify the most effective instruments and tools to measure the impacts of such interventions and, on the other, to establish shared quality standards that address

both the creation of policies and the direct interventions.

Against this background, the **overall objective** of the project is to promote **collective reflection** within the cultural and political sector in Europe on the **impact and quality of interventions in European historical environment and cultural heritage sites at urban level** in order to promote a **holistic impact assessment model**, indicators and standards.

The project intends to make a decisive contribution to this endeavour, laying the basis for an articulated vision shared by all the stakeholders in the sector and to help define the most important challenges and opportunities in this field in order to contribute to the development of strategic and integrated European and international policies and interventions.

This main objective will, in turn, be articulated in a number of more **specific and substantive objectives**, namely:

- To make an extensive **review** of the impact assessments, research, policies and best practices related to interventions undertaken in European historical environment and cultural heritage sites in EU 28 (or 27 taking into account the possible withdrawal of the United Kingdom).
- To identify **gaps and main issues** related to the impact assessment of interventions on cultural heritage.
- To propose shared **quality standards** to be required for restoration and other interventions in European historical environment and cultural heritage sites.
- To develop a **model for holistic impact assessment** of interventions on cultural heritage disaggregated in 4 main interconnected domains, social, cultural, economic and environmental, and test it on comparable observation units with similar characteristics albeit in different contexts.
- To develop a shared view within the **social platform** on the more important and policy relevant issues in this field for Europe in the coming years and the best way to address them.
- To produce **toolkits, recommendations, an action plan and policy guidelines** in this domains to support the EU's future action in this field.

The project will set up a social platform that will support the achievement the overall and specific objectives: its title is "Social Platform for Holistic Heritage Impact Assessment - SoPHIA". We consider that the acronym SoPHIA conveys, to its fullest extent, the values and notions that underpin the project proposal.

Indeed, the Ancient Greek word *sophia* (σοφία, sophía) is the abstract noun of *σοφός* (sophós), with an initial meaning of "clever, skillful, intelligent and wise". Both words share the same root as the Latin verb *sapere* (lit. "to taste; discern"). Homer and Pindar use the word to refer to the technical skills of deities such as Hephaestus and Athena; with Plato, the word takes on the meaning of "sound judgment, intelligence, practical wisdom". Moving in time, in the Library of Celsus in Ephesus (II century b.C.), there were four statues of female allegories: wisdom (Sophia), knowledge (Episteme), intelligence (Ennoia) and valour (Arete) and, in the same period, for Gnosticism Sophia assumes the aspect of a goddess or angelic power: she is a feminine figure, analogous to the human soul but also simultaneously one of the feminine aspects of God.

Beyond its ancient philosophical and religious meaning, Sophia is a word which is used also in contemporary contexts of reference. It is a main belt asteroid or minor planet of the inner Solar system (251 Sophia) and a social humanoid robot, developed by Hanson Robotics, who made its first public appearance at the South by Southwest Festival (SXSW) in 2016. Using Artificial Intelligence (AI) the robot is able to display facial expressions, has featured in the media and has participated in many high-profile interviews: in November 2017, Sophia was named the United Nations Development Programme's first ever Innovation Champion, and is the first non-human to be given any United Nations title. Finally, SOFIA is also NASA's "Stratospheric Observatory for Infrared Astronomy", which took off for its first science flight in 2004, or "Operation Sophia - EU Nav for Med", the 2015 European Union Naval Force operation in the Mediterranean.

For all these reasons SoPHIA echoes both the interest for ancient history as well as the relevance for contemporary societies.

Within SoPHIA, our work is aimed at creating a **Social Platform**, a vast and diverse community of stakeholders from different fields and disciplines interested in interventions in historical environment and cultural heritage sites in Europe, that will work together towards the definition of quality standards and of guidelines for future policies and programmes.

With the constant active participation of the social platform, our work on the research and policies developed in this field will be organized around four main analytical dimensions – social, cultural, economic and

environmental impact - which constitute perspectives to identify the most important challenges and opportunities linked to cultural heritage interventions in Europe. We will structure the analysis through a targeting process in two stages: a first exploration of the general topic and the current situation as regards policies, assessment and quality of interventions, including best practices, and the creation of a draft holistic impact assessment model; and a second moment that involves going into specific topics in depth by analysing specific case studies selected during the first phase to confirm or adjust the first phase findings. The second stage will analyse case studies with the model based on 3 axes: people, domains and time.

The final step of the project will consist in synthetizing the findings against the results of the analyses performed and drafting recommendations for both practitioners and policy makers for the future of good quality interventions in cultural heritage. The analysis and policy papers will focus on European heritage, however, the final aim is to propose models and standards that can potentially be applied internationally.

The ultimate backdrop to SoPHIA, as referred to in the title and also in the paragraphs above, is the constitution of a **social platform** intended as a place for stakeholders' exchange and interrelation for the co-creation and validation of the project's outputs (see section 1.3.a.4.).

Figure 1 Conceptual categories
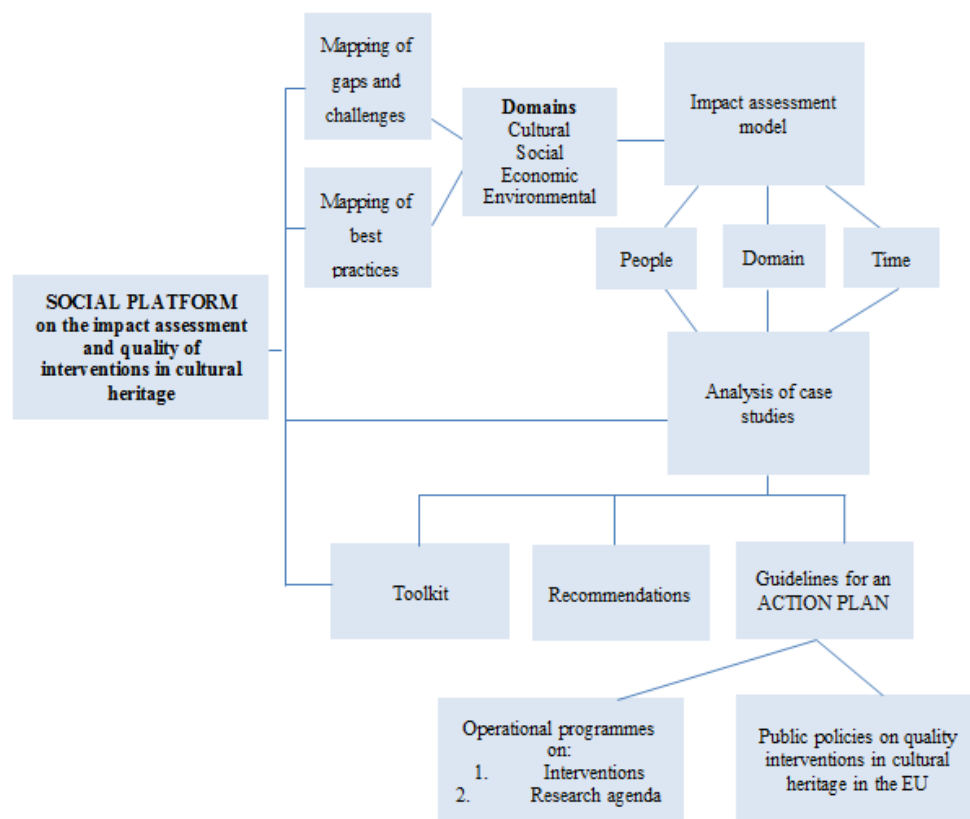
1.2 Relation to the work programme

The Horizon 2020 work programme 2018-2020 "Europe in a changing world: inclusive, innovative and reflective societies" goes beyond mentioning some of the most important challenges in Europe: it calls for solutions to "support inclusive, innovative and reflective European societies in a context of unprecedented transformations and growing global interdependencies".

SoPHIA responds to the REFLECTIVE strand within the above-mentioned Work Programme. This social platform has been conceived as a double-shaped process enabling interactions and work dynamics stemming from the shared identification and formulation of the most urgent topics and issues to be addressed in further research initiatives, policies and practices relating to the interventions on cultural heritage. Therefore, the impact of SoPHIA will be both **substantive** (research to understand the impact of interventions in cultural heritage and the processes involved in the changes that these interventions may generate) and **formal** (the process whereby these topics are identified, brought to the table, discussed, and agreed upon, as well as how the platform itself

addresses its own survival beyond the EC-infused initial impulse). Such impact, however, should not be limited to an intellectual exchange but should be contrasted with stakeholders and should consider the creation of a space for cohesion and solidarity among citizens within any policy or praxis follow-up.

In addition, the project also focuses on the INNOVATIVE strand by focusing on the different domains affected by cultural heritage interventions and including, in the overall discourse and analysis, new technologies and digital heritage as representative of the fourth industrial revolution. In this sense, it clearly takes into account the social, cultural and economic benefits of the current tools available to the different professionals for undertaking interventions on cultural heritage.

On the other hand, the third step of the project addresses the issue related to the waning of "citizens' trust in many public institutions and their capacities to address effectively these challenges" by drafting research agendas and action plans for future European action aiming at improving citizens' perception of the EU relating to quality of interventions undertaken in the framework of its policies, programmes, funding and guidance.

It is worth mentioning that quality interventions on cultural heritage that consider all axes and domains, therefore all possible impacts in a cross-cutting perspective, better respond to current needs of societies, characterised by new challenges determined by increasing cultural diversity and migration. Cultural heritage, if well managed and with such an aim, may contribute to increasing social inclusion, intercultural dialogue, mutual understanding and integration. This aspect, though marginal and mainly tackled by other calls of the work programme, will nevertheless be taken into account also by SoPHIA.

The proposed project aligns with the Call which addresses "Socioeconomic and cultural transformations in the context of the fourth industrial revolution", as it will provide alternative policy options that are based on a bottom-up process that involves diverse stakeholders in the different steps that will lead to their formulation.

It will also contribute to the objectives and legacy of the European Year of Cultural Heritage 2018, as it is related to people's understanding and perception of Europe's rich and diverse cultural heritage and to the public value of culture for our societies; it will also consider EYCH 2018 related initiatives for testing the impact assessment model. Finally, it will relate to the UN's Sustainable Development Goals (SDGs), in particular: 8. Decent work and economic growth, 11. Sustainable cities and communities; 12. Climate action. It is, nevertheless, also cross-setting since culture transversally present in different SDGs, as explained in chapter 1.3.

In addition to the abovementioned work programme, the relevance of cultural heritage for societies is emphasized in the Creative Europe legal basis[1]: the official European Parliament and Council document states the aim of this framework programme supporting culture in Europe to be "to promote cultural diversity and intercultural dialogue, culture as a catalyst for creativity in the framework for growth and jobs and culture as a vital element in the Union's international relations" (p.1). In addition to a budget devoted to support the development of the cultural industries and cultural production in Europe, concrete actions in accordance with the various UNESCO Conventions on heritage will also be developed (i.e. the "European Heritage Label action", which will be taken in to account for the selection of case studies). SoPHIA will contribute to some of the issues identified in Creative Europe by:

> 1. Addressing some of challenges identified in the previous culture programs of the EU (MEDIA, Culture and MEDIA Mundus), namely the impact of the digital shift and globalisation, market fragmentation caused by linguistic diversity, barriers to adequate finance, a shortage of comparable data, limited mobility and transnational circulation of cultural and creative works causing geographical imbalances, etc.;

> 2. Promoting cross-discipline and cross-sector collaboration via a focussed work plan between key European cultural actors;

> 3. Initiating a network and implementing a good governance system so as to support its sustainability beyond the funding period;

> 4. Acknowledging the diversity of Europe's cultural heritage and identifying possible future action lines that strengthen the different cultural traditions of European heritage.

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[1] Regulation (EU) No 1295/2013 of the European Parliament and of the Council of 11 December 2013 establishing the Creative Europe Programme (2014 to 2020) and repealing Decisions No 1718/2006/EC, No 1855/2006/EC and No 1041/2009/EC.

1.3   Concept and methodology; quality of the measures

1.3.a Analytical Concept

Recent studies have raised the awareness of the importance of impact evaluation of cultural initiatives, including interventions in European historical environment and cultural heritage sites. On the basis of these results, some of which stem from EU interventions (see EU 2015[2], European Parliament 2015[3], EC 2017[4], 2018[5]), there is a widespread debate among practitioners, academics, and policy makers in relation to the current understanding of the quality of restoration and other interventions in historical environment and cultural heritage sites in Europe and the appropriateness of their related impact assessment.

Since the 1990s, cultural heritage policies have evolved from an object-oriented approach, focussing on the physical conservation and "intrinsic value" of the so called "immovable heritage" towards a more subject or value-oriented approach, based on a broader definition of cultural heritage that encompasses both tangible and intangible aspects: the associational (i.e. symbolic, social and cultural) values brought to cultural heritage by local communities (Koziol, 2008[6]; CHCfE, 2015[7]). As a result of this heritage discourse evolution, there has been a change in the idea of the quality of protection/conservation interventions: they are no longer exclusively related to the technical quality of the restoration of the historical built heritage but encompass other kinds of interventions aimed at maintaining the historic urban environment, understood as an inclusive subject that brings together movable and immovable, tangible and intangible, natural and cultural elements to be maintained through an integrated approach (Bouchenaki, 2003[8]; Araoz, 2011[9] Orbaşli, 2017[10]).

Strictly connected with this new perspective, the idea that investments in cultural heritage can produce value for the wider society helping to achieve goals that affect its development and well-being has taken ground (Van der Auwera, Schramme, 2014[11]) .

Referring to the impact assessment of cultural heritage interventions a plethora of understandings inform reports, papers, documents, as well as practice highlighting "the multi impact field of cultural heritage" have been produced (CHCfE, 2015, p.195)[12].

Now is the time to come up with a shared understanding of the requirements for the quality of interventions in European historical environment and cultural heritage sites at urban level and to promote collective reflection on the impact assessment models.

To this aim, our proposal will start from the current state of research on the impact assessment of interventions undertaken in cultural heritage.

Initially, in literature, 'impact' has been used mainly in a negative sense (as in *environmental impact*), with the induced changes mainly understood as loss or shock or collapse and subsequent positive or negative feedback on the side of the impacted system. More recently the theory of change (Rogers, 2014)[13] defines 'impact' as those social changes that are reached and maintained in the long-term through the interaction of a given programme or project and the changes they have generated with other factors and conditions.

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[2] European Union (2015). *Getting cultural heritage to work for Europe Report of the Horizon 2020* Expert Group on Cultural. Luxembourg: Publications Office of the European Union, 2015. ISBN 978-92-79-46046-3.

[3] European Parliament (2015). *Towards an integrated approach to cultural heritage for Europe*. Resolution of 8 September 2015 (2014/2149(INI)).

[4] European Commission. (2017). *Mapping of Cultural Heritage actions in European Union policies, programmes and activities* Latest update: August 2017 Retrieved from https://ec.europa.eu/culture.

[5] European Commission. (2018). *Supporting cultural heritage*. Retrieved from https://ec.europa.eu/culture/policy/culture-policies/cultural-heritage.

[6] Koziol, C. (2008) "Historic Preservation ideology: A critical mapping of contemporary heritage policy discourse." *Preservation Education and Research* 1(1): 41-50.

[7] CHCfE Consortium (2015). "Cultural heritage counts for Europe." CHCfE Consortium: Krakow, Poland.

[8] Bouchenaki, M. (2003) "The interdependency of the tangible and intangible cultural heritage." ICOMOS XIV General Assembly and Scientific Symposium: 1-5.

[9] Araoz, G.F. (2011) "Preserving heritage places under a new paradigm." *Journal of cultural heritage management and sustainable development* 1(1): 55-60.

[10] Orbaşli, A. (2017). "Conservation theory in the twenty-first century: slow evolution or a paradigm shift?." *Journal of Architectural Conservation* 23 (3): 157-170.

[11] Van der Auwera S., Schramme A. (2014) Cultural heritage policies as a tool for development: discourse or harmony? *ENACT Journal of cultural and policy* 4 (1): 3-8.

[12] CHCfE Consortium (2015). *Ibidem*.

[13] Rogers P. (2014). Theory of Change: Methodological Briefs-Impact Evaluation No. 2 *innpub747*.

In our specific case, we will consider the positive and negative changes produced by a cultural heritage intervention, directly or indirectly, intendedly or unintendedly. Hence, when evaluating the impact of a programme or a project, it is useful to consider the following questions:

- What has happened as a result of the programme or project?
- What real difference has the activity made to the beneficiaries?
- How many people have been affected?

This implies analysing and understanding the main impacts and effects resulting from the activity on the local cultural, social, economic, environmental context. It is a "dynamic concept" which pre-supposes a relationship of cause and effect. It can be measured through the evaluation of the outcomes of particular actions, be that an initiative, "a set of initiatives forming a policy or set of policies which form a strategy" (Landry *et al*., 1993)[14]. Lingayah *et al* (1996)[15], suggest that the starting point for measuring outcomes should be a definition of the purpose of cultural activities, against which their effectiveness or impact can be evaluated.

The debate on cultural heritage impact assessment underlines two main principles that shape the framework within which research on impact assessment unfolds: (1) the value of cultural heritage as a driver for **sustainable development** (2) its value as a **legacy for future generations.**

1.3. a.1 Cultural Heritage for sustainable development

It is widely accepted that cultural heritage is an important driver for sustainable development in Europe (Damien, Galeazzi, 2016)[16]. In fact, the EU has progressively incorporated culture in its development policies, considering culture as a basic element driving the success of other development goals (human development, social cohesion, green environment and gender-balanced opportunities). Indeed, promoting culture has been, since 2007, one of the three main objectives of the European Agenda for Culture in which the cultural sector is regarded as an increasing source of job creation, contributing to growth in Europe. Moreover, the European Parliament Resolution of 8 September 2015[17] *Towards an integrated approach to cultural heritage for Europe* underlined the importance of maximising the intrinsic, economic, and societal value of cultural heritage, in order to promote cultural diversity and inter-cultural dialogue.

Towards an integrated approach to cultural heritage for Europe has been supported by numerous methods and programmes from different sectors: in the cultural field through the Open Method of Coordination groups (OMC), Culture statistics, the European Year of Cultural Heritage 2018 (EYCH 2018), the Creative Europe programme (2014-2020), European Heritage Days (EHD) – Joint Action with the Council of Europe (CoE), the European Capitals of Culture (ECOC), the European Heritage Label (EHL), The EU Prize for Cultural Heritage / Europa Nostra Awards; in the education field through the ERASMUS+ programme, while the EU structural funds 2014-2020 are implementing a cohesion policy.

Arts and culture provide "socially valuable" leisure activities, "elevate" people's thinking and contribute positively to their psychological and social wellbeing and enhance their sensitivity[18]. Moreover, they are also understood as contributing to civic pride and responsibility, social cohesion, identity. For this reason, the arts and cultural sectors have been accorded exceptional protections, not only by the UNESCO Convention on Cultural Diversity (2005)[19] but also by various trade agreements forged within the GATT rounds (Galperin, 1999)[20] and the WTO (Voon, 2006)[21].

Worldwide, among politicians, professionals, academics and civil society there is deep understanding, knowledge and awareness of the full potential of cultural heritage as a key resource for sustainable development. In 2010 the United Cities and Local Governments (UCLG) network advocated for culture to be considered as the fourth pillar of sustainable development. [22] Since, the network aims at fostering culture through international awareness raising activities and the local implementation of concrete commitments and actions for culture

[14] Landry C, Bianchini F, Maguire M & Warpole K (1993) The Social Impact of the Arts. A discussion document. Stroud: Comedia

[15] Lingayah, S., Mac Gillivray, A. and Raynard, P. (1996) Creative Accounting; Beyond the Bottom Line (Comedia).

[16] Damien H., Galeazzi G. (2016). Culture in EU developement policies and external action, *Briefing notes, Ecdpm,* n. 92.

[17] European Parliament (2015). *ibidem*.

[18] Cicerchia, A. (2015) "Why we should measure, what we should measure." *Economia della cultura* 25 (1): 11-22.

[19] UNESCO (2005). Convention on Cultural Diversity. Retrieved from https://en.unesco.org/creativity/convetion.

[20] Galperin, H. (1999). Cultural industries in the age of free-trade agreements. *Canadian Journal of Communication*, 24(1).

[21] Voon, T. (2006). UNESCO and the WTO: A Clash of Cultures? *International & Comparative Law Quarterly*, 55(3), 635-651.

[22] Hawkes, J. (2001). *The Fourth Pillar of Sustainability: culture's essential role in public planning*, Common Ground, Melbourne

through its Agenda 21 for Culture[23].

In 2013, the UNESCO Hangzhou Declaration placed culture at the very heart of sustainable development policies[24]. More recently, in 2016, the UN 2030 Agenda integrates, for the first time, the role of cultural heritage and creativity, within the Sustainable Development Goals (SDGs), which are a universal call to action to end poverty, protect the planet and ensure that all people enjoy peace and prosperity.

The cultural heritage of the European Union is a rich and diverse mosaic of cultural and creative expressions. It includes natural, built and archaeological sites, museums, monuments, artworks, historic cities, literary, musical and audiovisual works, and the knowledge, practices and traditions of European citizens. Acknowledgement of this richness can be the basis for the development of a common cultural identity, a backbone for integration, justice and a sustainable future.

Indeed, heritage can make an important instrumental contribution to SDGs across its various dimensions. Preserving natural resources, including outstanding sites, is a fundamental contribution to environmental sustainability. World Heritage is an important asset for economic development, by attracting investments and ensuring green, locally-based, stable jobs. Moreover, world heritage is also essential to the well-being of people for its powerful symbolic dimensions. Actually well-being does not refer only to physical well-being, but it includes also a sense of meaning and purpose that is strictly connected with our relationship to the environment and the space where we live and or we belong to. Finally, acknowledgment and conservation of heritage, based on shared values and interests, may foster cultural development leading to mutual recognition, tolerance and respect among different communities, which is a precondition for a society's peaceful development.

Articulating the value of our heritage by providing quantitative and qualitative evidence of its impacts related to the SDGs dimensions, will indeed give more strength to the relevance of interventions in cultural heritage in Europe.

Strictly connected with this discourse, sustainability is an overarching principle to guide public and private interventions in cultural heritage. Defined by the UN Brundtland Commission (1987) as "meeting the needs of the present without compromising the ability of future generations to meet their own needs", it reminds that cultural heritage is our inheritance from previous generations of Europeans and our legacy for those to come.

Last but not least, it is important to highlight the effort made by the European Commission toward digitisation and online accessibility of cultural material and digital preservation, as witnessed by several Commission Recommendations and expert groups' reports. Among the priorities areas of intervention, there are digitisation on library and archival cultural resources; digitization of museum collections; digitization of monuments, historical buildings and archaeological sites (focus on 3D); digitization of sound and audio-visual heritage; digitization of intangible culture[25].

1.3.a.2 Safeguarding cultural heritage: the concept of resilience

Cultural heritage, in all its diverse tangible and intangible forms, needs safeguarding for future generations. However, we are facing conflicting views between the development needs of the current generation versus the protection needs for coming generations. Neglect, pollution, natural hazards and climate change, pressure to build new infrastructure to meet the development needs of the present generation are all playing their part in the damage to tangible cultural assets. In the same vein, globalisation of lifestyle, migrations and gentrification, besides having an impact on our immovable heritage, are phenomena that can make individuals and communities lose their memory and identity, that is to say their intangible cultural heritage. In line with the previous statements, the Faro Convention[26] encourages us to recognize that objects and places are important, not in themselves, but for the meanings and uses that people attach to them and the values they represent.

In recent years, EU policies and programme, including EU-funded supported research projects, have been oriented toward the preservation and the sustainable management of these valuable assets to increase their overall resilience, as witnessed by the 2018 EU Year of Heritage. *Resilience* can be defined as the capability of a system or process to absorb disturbance[27]. More specifically, cultural resilience is defined as the capability of a

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[23] See: http://www.agenda21culture.net/documents/culture-the-fourth-pillar-of-sustainability.

[24] UNESCO CLT-2013/WS/14.

[25] See: https://ec.europa.eu/digital-single-market/en/news/fourth-meeting-european-commissions-expert-group-digital-cultural-heritage-and-europeana-dche

[26] See: https://www.coe.int/en/web/culture-and-heritage/faro-action-plan.

[27] Folke, C., Carpenter, S., Walker, B., Scheffer, M., Chapin, T., & Rockström, J. (2010). Resilience thinking: integrating resilience, adaptability and transformability. Ecology and society, 15(4).

cultural system to absorb adversity, deal with change and continue to develop. Cultural resilience thus implies both continuity and change[28].

In the last years, innovative solutions and techniques, assessment systems, mitigation strategies, risk management models, disaster prevention, quick damage assessment, ICT tools and guidelines have been some of the major results delivered in the field of cultural heritage.

However, at the same time, Europe has experienced serious economic crises that have led to spending constraints and tightened public investments. In this respect, keeping in mind that cultural heritage assets are not renewable resources and that, therefore strengthening their resilience is a starting point, there is a need for decision-makers to prioritise interventions in this field and evaluate their impact assessment.

1.3. a. 3 The four domains for impact assessment of cultural heritage interventions

Drawing on the above-mentioned two principles that state that cultural heritage should be both enriched in line with sustainable development and preserved following the concept of resilience, a general trend has been established towards a rigorous and holistic model for the impact assessment of interventions undertaken in European cultural heritage.

The analytical concept developed here enables us to see how the **impact assessment must be conceived as multifaceted and complex**. Conceptual models have been proposed that break down the impact into distinct dimensions, with relation to specific domains where a given impact might be detected. A number of categorizations of these domains have been proposed, that differ in relation to the labels that have been used but all share a substantial view (Mason, 2002)[29]. **These distinct and yet interconnected domains can be defined as: social, cultural, economic, environmental** (CHCfE, 2015[30]; Crossik & Kaszynska, 2016[31]) (Figure 1).

SoPHIA will, consequently, first attempt to identify the gaps and the main issues that are highlighted in the literature with respect to the intervention on cultural heritage and to intervention quality standards. This will be achieved through **a systematisation of the current state of research that will focus on each one of these domains – cultural, social, economic and environmental**. Some of the main controversies are summed up in the following paragraphs.

Figure 2 The state of art of research on impact assessment for cultural heritage interventions
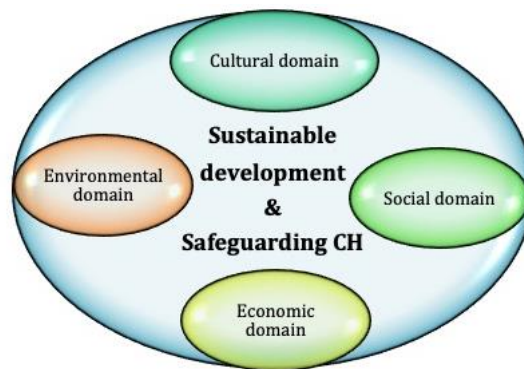
Cultural domain

It seems obvious to consider the cultural dimension when assessing the impact of cultural interventions.

As per the definition of Bourdieu (1985)[32], cultural capital (a person's knowledge and intellectual skills) provides advantage in achieving a higher social-status in society. From a collective point of view, culture is the substructure of society because it gives signification to our lives and society. Indeed, through culture, people and groups define themselves, conform to society's shared values, and contribute to society. Hence, culture provides

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[28] Holtorf, C. "Embracing change: how cultural resilience is increased through cultural heritage." World Archaeology (2018): 1-12.
[29] Mason, R. (2002). Assessing values in conservation planning: methodological issues and choices. In: de la Torre, M., ed. *Assessing the values of cultural heritage*, Los Angeles: The Getty Conservation Institute, pp. 5-30. Available at: http://hdl.handle.net/10020/gci_pubs/values_cultural_heritage 5-30.
[30] CHCfE Consortium (2015). *ibidem*.
[31] Crossik, G., Kaszynska, P. (2016). Understanding the value of arts & culture: The AHRC Cultural Value Project. Arts and humanities research council.
[32] Bourdieu, P., (1985). *The forms of capital*. In: Richardson, J.G. (Ed.), *Handbook of Theory and Research For the Sociology of Education*, Greenwood, NewYork, NY, pp. 241-58.

"meaning" to people and this dimension of the cultural value is one of the main reasons to invest in "common culture", which does not mean a shared culture but rather a field that allows people to meet and to debate. Such a common place is of great importance for building Europe's cultural coherence (Gielen et al., 2015)[33].

Investments in culture, such as interventions in historical environment and cultural heritage sites, encompass actions to preserve and enhance cultural heritage, thus preserving and possibly enhancing its cultural value. Nevertheless, the notion of cultural value is not straightforward (Crossik, & Kaszynska, 2016)[34]. It is now part of a common understanding that the cultural value expands beyond the limits of inherent value. Indeed, **the notion of cultural value is more inherent with the significance of the historical environment and cultural heritage sites as the set of positive characteristics or qualities that society, consisting of various groups with legitimate interest in the site, attributes to this object or site** (Mason, 2002; de la Torre et al., 2005)[35] [36].

Undoubtfully, cultural heritage interventions have some kind of impact on the following cultural categories: historical value, commemorative value, aesthetic value, symbolic value, educational value (Throsby, 2001; Throsby, 2003)[37] [38].

Social domain

According to the EU, looking after our heritage should be a common responsibility. Consequently, the EU supports the adaptation of a participatory, locally rooted and people-centered approach to heritage[39], also as a means to foster democratic participation, sustainability and social cohesion and to face social, political and demographic challenges (Laaksonen, 2010)[40]. In addition, this is supported by the growing movement of peer-to-peer (P2P) production, also known as peer production and the growing cooperative economy, and debates over the type of polity of representative democracy all over Europe.[41] Under the perspective of the relationship between heritage and the community, some relevant issues have to be taken into account.

Heritage can be seen under an **object-oriented understanding**, that implies management approaches based on facing threats of destruction, loss or decay and consider our inheritance from previous generations of Europeans as "our legacy for those to come" (European Commission, 2018)[42]. Some issues derive from this approach: lack of integration into the general urban framework; top-down organisation and approach to heritage; underestimation of diverse communities heritage values.

In a different approach, **heritage can be seen as a "cultural practice" or "social process**" related to "what goes on at these sites" and considers sites "as vehicles for the transmission of ideas in the service of a wider range of contemporary social needs" (Smith, 2006)[43]. Conservation can be seen, also, as agent of change (Pendlebury, 2013)[44]. In that perspective, it must be taken into account that the attribution of meaning to heritage is intrinsically embedded within complex and specific power relations that may subsequently affect the what, how and for whom heritage is considered.

These two issues have to be investigated further to better focus the purposes of cultural heritage impact assessment: **protection** of the "intrinsic" value of heritage, **developing appreciation** of a shared heritage by/with the community, improvement of heritage **management** under an open/participatory perspective.

[33] Gielen, P., Elkhuizen, S., Van den Hoogen, Q., Lijster, T., & Otte, H. (2015). Culture: the substructure for a European common. Rijksuniversitiet Groningen.

[34] Crossik, G., Kaszynska, P. (2016). *ibidem*.

[35] de la Torre, M., MacLean, M., Mason, R. & Myers, D., Eds. (2005). *Heritage Values in Site Management: Four Case Studies*. Los Angeles: The Getty Conservation Institute.

[36] Mason, R. (2002). *ibidem*.

[37] Throsby, D., (2001). *Economics and culture*. Cambridge: Cambridge University Press.

[38] Throsby, D., (2003). Determining the value of cultural goods: how much (or how little) does contingent valuation tell us? *Journal of Cultural Economics*, 27: 275-285.

[39] See: https://www.interarts.net/publications/mapping-of-practices-in-the-eu-member-states-on-participatory-governance-of-cultural-heritage-to-support-the-omc-working-group-under-the-same-name-work-plan-for-culture-2015-2018/; https://www.interarts.net/publications/participatory-governance-of-cultural-heritage/

[40] Laaksonen, A. (2010). Making culture accessible. Access, participation in cultural life and cultural provision in the context of cultural rights in Europe. Strasbourg: Council of Europe.

[41] See: http://peerproduction.net/editsuite/issues/issue-11-city/editorial-notes/.

[42] European Commission. (2018). *ibidem*.

[43] Smith, L. (2006). Uses of heritage. London New York: Routledge, Taylor & Francis Group.

[44] Pendlebury, J. (2013). Conservation values, the authorised heritage discourse and the conservation planning assemblage. *International Journal of Heritage Studies,* 19(7), 709-727.

Economic domain

Efforts to measure the economic value generated by cultural heritage in various forms and uses reached a high point in the mid-1980's (see, among others, Ost and Lémaire, 1984)[45]. Many of them focused on tourism spillovers. Thus, the most frequently mentioned impact was on accommodation, transportation and restaurants, with little attention paid to cultural consumption. Recent studies (Billi, Alessandrini and Valeriani, 2018)[46] document via an input-output approach that investments in restoration and conservation of cultural heritage have primarily rewarded the construction sector, while impacts on cultural and creative activities, business and occupations remains widely unexplored. In the last years, scholars and stakeholders alike tended to express dissatisfaction with the conventional quantitative measures borrowed from economic performance toolkits, solely based upon quantitative and indicator-oriented approaches, which were considered unsuitable for conveying the core values involved in cultural practices. Other approaches, like SROI (Social Return of Investment), although assessing similar component subsets of the most part of the subjects involved, nonetheless are based upon formal ex ante planning perspectives and require that investments on a given activity are made with distinctive social impacts planned ahead as their main outcomes. This is not the case with those cultural programmes which are carried out mainly for cultural and artistic purposes and generate unplanned social impacts often far beyond the expectations.

Cultural economist Ruth Towse argues the case that the process of 'agglomeration economies of culture' via Cities of Culture designations or other bundled experiences of culture are supported by an uncoordinated process. She argues that there are external benefits to such activities suggesting that while cultural activities are seen as the primary value of these policies, 'sustainable long-term economic benefits are also emphasised.' In relation to culture and heritage being used as a mechanism for urban renewal policy goals Towse argues that 'the dual aims of maximising the return on the investment needed for such projects in terms of sustainable long-term net benefits and increasing the involvement of the community in cultural activities are not necessarily consistent.' [47] These dual aims have led to a reliance on impact assessment by cultural economists which emphasise market based analysis using a Keynesian multiplier. Pratt (2009[48]) describes what he calls a 'Xerox' style copying of a policy approach to 'creative city' development that can actually hamper efforts to really think about and engage with a localised set of conditions and opportunities.

Environmental domain

The impacts of planned developments on heritage have typically been assessed within the framework of Environmental Impact Assessment (EIA). In EU legislation, Directive 85/337/EEC[49] specifically mentions the impact on cultural heritage as one of the factors that should be assessed within an EIA.

Among the critical issues related to the coverage of heritage within EIA, we can underline two relevant points: impact assessment practitioners may not be sufficiently familiar with heritage management insights (Langstaff and Bond, 2002; Jerpåsen and Larsen, 2011)[50][51]and the methods used to determine the impacts of developments on cultural heritage can be inadequate (Teller and Bond, 2002; Fleming, 2008; Antonson, Gustafsson, and Angelstam, 2010; Lindblom, 2012)[52][53][54][55].

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[45] Lémaire R.M., Ost, C. (1984), Evaluation economique du patrimoine monumental. Presentation d'une méthode d'analyse, Research commissioned by CEE SG/CULTURE/22/85/FR Brussels.

[46] Alessandrini S., Billi A., Valeriani E. (2018), Local impact of cultural investments. An application for Southern Italy, Economia della Cultura, 4: 433-450, doi: 10.1446/92240

[47] Towse, R. (2014). Advanced Introduction to Cultural Economics, Elgar Advanced Introductions, Cheltenham, UK.

[48] Pratt, A. (2009). Urban Regeneration: From the arts "feel good" factor to the cultural economy: A case study of Hoxton, London, *Urban Studies*, 46 (5/6): 1041-61

[49] The initial Directive of 1985 and its three amendments have been codified by DIRECTIVE 2011/92/EU of 13 December 2011. Directive 2011/92/EU has been amended in 2014 by DIRECTIVE 2014/52/EU (for detailed see: http://ec.europa.eu/environment/eia/review.htm)

[50] Langstaff, L., Bond. A. (2002) "The consideration of cultural heritage within EIA practice throughout Europe." Communities 175: 40-8.

[51] Jerpåsen, G. B., Larsen, K. C. (2011),. "Visual impact of wind farms on cultural heritage: A Norwegian case study." *Environmenta Impact Assessment Review* 31 (3): 206-215.

[52] Teller, J., Bond, A. (2002), "Review of present European environmental policies and legislation involving cultural heritage", Environmental Impact Assessment Review, 22(6): 611-632.

[53] Fleming, A. K. (2008). Standards of international cultural and financial institutions for cultural heritage protection and management. http://dev. iaia. org/pdfs/concurrentsessions/CS2-9_cultural_Fleming. pdf

[54] Antonson, H., Gustafsson M., and Angelstam P., (2010). "Cultural heritage connectivity. A tool for EIA in transportation infrastructure planning." *Transportation Research Part D: Transport and Environment* 15(8): 463-472.

The holistic approach of the social platform helps facing both of these issues.

The conceptual frameworks based on the four above-mentioned domains show at least four flaws:

a) They remain somewhat descriptive. Although in some cases they provide detailed description of the criteria to measure such impact, there is still a lack of understanding on how such concepts can inform a sound model for a holistic impact assessment;

b) They do not clarify whom they are intended for. Indeed, different stakeholders' perspectives may be taken into consideration when designing a new an impact assessment model;

c) They tackle each domain separately. Although these documents report the overlaps between the different areas, they do not seem to take enough into account the potential negative externalities that might occur between the domains (economic, social, environment, cultural). Tools that are used and sponsored at the European level, such as the Environmental impact assessments (EIA) and Heritage Impact Assessments (HIA) are not able to capture the multi-dimensional nature of cultural significance and sustainability (Ding, 2008)[56]. EIA is also considered to neglect the interaction between attributes and "cumulative impacts and incremental changes" (ICOMOS, 2011)[57].

d) They do not take the time variable into account. Most of the time, these models are of use in the impact evaluation only after the intervention has taken place. It is therefore important to establish whether a holistic model for the impact assessment should also be valuable ex ante, that is to say when the cultural intervention is planned and discussed.

1.3.a.4. A social platform for a community of practice to discuss impact assessment models and best practices

Given the issues highlighted above, we propose to set-up a Social Platform[58] in order to push this discourse which will enable us to develop a model for holistic impact assessment of interventions on historical environment and cultural heritage.

The aim of a Social Platform is to provide for the setting-up of a Community of Practice (CoP). The concept as developed by anthropologists Jean Lave and Etienne Wenger[59], is that of a group of people whose common interest in a certain domain or area provides the basis for information- and experience-sharing and, thereby, enables them to learn from each other and develop themselves personally and professionally. CoPs are based on balanced communication among members, which are simultaneously learners and providers of knowledge. Other key factors in a successful CoP include motivation and collaboration. In this vein, SoPHIA will build a Social Platform intended as a CoP that fosters the development of a shared vision on the best practices related to impact assessment of cultural interventions. The Social Platform will gather the expertise and favour the knowledge sharing between researchers, practitioners and policy makers so that best practices are discussed and shared with the relevant stakeholders.

CoPs succeed when they are designed to evolve naturally: at the end of the action, beneficiaries will have the space to introduce shifts in priorities if necessary, whilst still taking advantage of the contacts made and knowledge gained in the course of the action. This will lead to the definition of quality standards and recommendations to EU and stakeholders. Ultimately, the CoP will validate and stand for SoPHIA's outputs.

1.3.a.5 The Sustainability+Resilience approach for a holistic impact assessment model

We propose to pursue a cross-fertilisation between the cultural, social, economic and environmental domains. Through an interdisciplinary approach, we aim at integrating the well-established concepts of cultural heritage policy with a **managerial approach.** The latter is based on the assumption that cultural interventions do not

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[55] Lindblom, I..(2012) "Quality of Cultural Heritage in EIA; twenty years of experience in Norway." *Environmental Impact Assessment Review* 34: 51-57.

[56] Ding, G. (2008). Sustainable construction – The role of environmental assessment tools. *Journal of Environmental management* 86: 451-464.

[57] ICOMOS (2011), Guidance on Heritage Impact Assessments for Cultural World Heritage Properties. Paris: ICOMOS.

[58] For EU-funded social platforms, see in particular: CulturalBase: www.culturalbase.eu; RICHES - Renewal, Innovation and Change: Heritage and European Society: https://www.riches-project.eu/; NETCHER: NETwork and digital platform for Cultural Heritage Enhancing and Rebuilding: https://www.interarts.net/projects-on-going/horizon-2020-netcher/

[59] Wenger, E. Lave J. (2001) "Legitimate peripheral participation in communities of practice". In: *Supporting lifelong learning* Routledge:121-136.

happen in a vacuum. Rather, they are embedded in a system that comprises cultural, socio-economic and environmental elements that are interrelated. Each of these elements constitutes a set of resources that can be leveraged through the cultural intervention. On the other hand, these elements may determine a set of liabilities that must be taken into account. A correct planning of any cultural intervention should therefore be based on a strategic vision, with clear objectives whilst considering how to balance the resources and the liabilities in order to produce the expected benefits. In this sense, the application of a strategic vision to the cultural interventions seems appropriate to feed an approach for the impact assessment. EU investment in cultural heritage requires not only a clear understanding of the resource implications for future interventions; it also needs to duly take into account the social, cultural, economic and environment dimensions of sustainable development.

The impact assessment models drawn in the mainstream literature describe the four areas as having the same importance. Nevertheless, we believe that each cultural intervention could impact these areas in asymmetric ways. Moreover, stakeholders' (policy makers, professionals and local communities) resource constraints that should be taken into account both *ex ante* and *ex post* (Figure 2).

Figure 3 The SoPHIA euristic approach to discuss impact assessment models and best/worst practices

The conceptual objectives of the project innovate from the previous conceptual models, first by embracing the "sustainability + resilience" view as overarching principles.

As mentioned above, sustainability and resilience are the overarching concepts that should be considered when assessing the impact of interventions in cultural heritage.

The concept of sustainability is relevant in shaping our conceptual framework for two main reasons:

- First, it reminds us of addresses the multifaceted aspects of the concept of "impact" (cultural, social, economic and environmental), which can be aligned to the SDGs.
- Secondly it calls for an intergenerational balance of needs in relation to SDGs and thus requires a multi-time frame analysis to assess the impacts of cultural heritage interventions.

The concept of resilience is relevant as well, when considering the quality of intervention in cultural heritage. In fact, research in system thinking and resilience suggests that future conditions may be different, more extreme and rapidly changing than previously experienced, requiring very different approaches to assessment. Traditional frameworks focus on the current state of a system without considering complex interactions and interdependencies between resources and stakeholders (Sirakaya, Teye and Sonmez 2002; Strickland-Munro, J. K., Allison H. E., and Moore S.A., 2010)[60][61]. On the other hand, resilience thinking provides a management approach which recognises human and natural systems as complex systems that are continually adapting (Allison

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[60] Sirakaya, E., Teye V., Sönmez S..(2002) "Understanding residents' support for tourism development in the central region of Ghana." *Journal of travel research* 41 (1): 57-67.
[61] Strickland-Munro, J. K., Allison H. E., and Moore S.A. (2010) "Using resilience concepts to investigate the impacts of protected area tourism on communities." *Annals of Tourism Research* 37 (2): 499-519.

and Hobbs, 2004)[62] and thus require a dynamic model of indicators to be evaluated and monitored.

1.3.a.5 The three axes for a holistic impact assessment model: people, domains, time

On the basis of the "sustainability + resilience" view, we propose to engage the Social Platform in a discussion about a tentative holistic model, which should be based on three axes::

  i)   **PEOPLE: the multi-stakeholders perspective;**
  ii)   **DOMAINS: the inter-dimensional view that takes into account the positive and negative externalities that occur within and between the four domains;**
  iii)   **TIME: the longitudinal perspective, which takes into account the *ex-ante*, *ex-post* impact assessment.**

Figure 4 The three axes for a holistic impact assessment model: people, domains, time
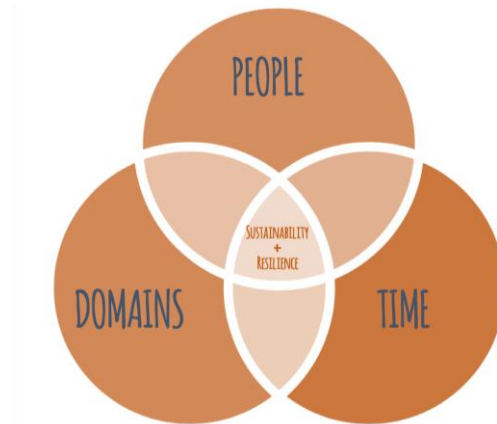
People: the multi-stakeholders perspective

A stakeholder refers to an individual, group, or organisation that has a direct or indirect interest or stake in a particular initiative or organization (i.e. governments, non-governmental organisations, communities of interests, professionals and in general, citizens). Cultural heritage "sustainability + resilience" is a question that calls for stakeholders to participate in both dialogue and decision making processes as well as in the implementation of solutions to common problems or goals. The principle behind a multi-stakeholder perspective on a holistic model for cultural heritage impact assessment is that it gains more legitimacy, and therefore better reflects a set of interests rather than a single source of validation. Hence, the following is a first tentative list of main stakeholders involved:

a.   policy makers at different levels (regional, national, EU);
b.   local communities (to guarantee the construction of a shared heritage under an inclusive and participatory perspective);
c.   youth and future generations (to take into account our legacy and responsibility);
d.   civil society organisations and networks;
e.   others.

Domains: the inter-dimensional perspective

Some relevant studies have highlighted the potential interrelations between the four domains (McLoughlin et al., 2006; Yung & Chan, 2012; Gielen et al., 2014; CHCfE Consortium, 2015)[63] [64] [65] [66]as well as unintended consequences of cultural interventions (e.g. Harris & Ogbonna, 2002)[67].

As mentioned above, tools that are used and sponsored at the European level, such as the Environmental impact

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[62] Allison, H. E., Hobbs R.J. (2004). "Resilience, adaptive capacity, and the lock-in trap of the Western Australian agricultural region." *Ecology and society* 9.(1).
[63] McLoughlin, J., Sodagar, B. & Kaminski, J. (2006). Dynamic socio-economic impact: a holistic analytical framework for cultural heritage sites. In: McLoughlin, J., Sodagar, B. & Kaminski, J., (eds.9 *Heritage impact 2005*. Proceedings of the first international symposium on the socio-economic impact of cultural heritage. Budapest: EPOCH, pp. 43-57.
[64] Gielen et al. *ibidem*
[65] Yung, E. H., Chan, E. H. (2012). Implementation challenges to the adaptive reuse of heritage buildings: towards the goals of sustainable, low carbon cities. *Habitat International*, 3(36): 352–361.
[66]CHCfE Consortium (2015). *ibidem.*
[67] Harris, L. C., Ogbonna, E. (2002). The unintended consequences of culture interventions: A study of unexpected outcomes. British *Journal of Management*, 13(1), 31-49.

assessments (EIA) and Heritage Impact Assessments (HIA) are not able to capture the multi-dimensional nature of cultural significance and sustainability. Indeed, current EIA tools are mostly single-dimensional, and are not strongly linked with the cultural dimension of impact. There is a lack of objectivity and completeness in HIA, even when part of an EIA. EIA is also considered to neglect the interaction between attributes and "cumulative impacts and incremental changes" (ICOMOS, 2011)[68]. Thus, there is a unanimous plea for a more global and objective assessment approach to assist monitoring cultural heritage properties, directly linked to their cultural significance.

Time: the longitudinal perspective

Matarasso and Landry (1999)[69] point out that the impact of a project is the sum of the outputs and outcomes, because, unlike the outcomes, an overall analysis of its results, the impact of a project may change over time as subsequent events unfold. A planned impact should be measured ex ante, while an unplanned impact can be reconstructed only ex post. And that poses additional questions about the appropriate time horizons for such evaluation. Often, impacts are conceived as unexpected, i.e. unrelated to any targeted planning activities. Positive or negative impacts alike tend to be treated as surprises rather than as the expected effects or regrettable consequences of specific actions taken on specific impact areas expressly with the purpose of inducing a specific change.

Thus, when referring to time, we are talking about the development of an evaluation tool that improves upon existing HIAs or EIAs. Initially, this occurs at the planning stage of new developments that may impact heritage. Then, there is the post-development evaluation assessing the impact of a heritage related infrastructural development on the local area. Moreover, there is the long-term impact of such developments long after the investment has been carried out.

1.3.a.6. Criteria for the selection of case studies

As a further step, the Social Platform will be exploited to test the model on comparable observation units with similar characteristics but in different contexts. In order to do so, we propose to perform in depth case studies focusing on cases of excellence but also on examples of bad practices of impact assessment. We will include cases that are representative of the several of the EU funding opportunities (such as European Regional and Urban development funds-ERDF, European Structural and Investments Funds-ESF, European Capital of Culture-ECoC and European Heritage Label programs; EU funding programs for digital culture heritage). Moreover, the selection of these cases will be made applying methodological criteria that are both rigorous enough to allow comparability among the observation units, and flexible enough to allow the social platform to include observation units as the debate unfolds.

As a starting general criterion, we propose to focus on urban contexts. The European Union is characterized by its specific urban long-lived and reticular system (Cattan, Pumain et al., 1994)[70], and the changes of the last decades have consolidated the organisation of the European space in urban regions of medium-sized cities. Thus, medium-sized cities and more fragile contexts are elective cases for analysis because they are noteworthy cases in which to test the concept of "sustainability + resilience", understood as the ability to relate with the impact assessment on heritage and to use it as a key towards empowerment.

Moreover, the cases selected will span the European geography to ensure balance and diversity. If convenient, they will also be drawn from outer EU contexts, in order to favour transnational and interdisciplinary networking.

1.3.a.8 Synergies with other research and innovation activities

The following national and international projects will be taken into account to create synergies and capitalize on their results and outputs that will feed into the project.

[68]ICOMOS (2011), *ibidem*.

[69] Matarasso, F., Landry C. (1999). Balancing act: twenty-one strategic dilemmas in cultural policy. *Council of Europe*.

[70] Cattan, N., Pumain D., and Rozenblat C.. (1994) "Saint-Julien Th.(1994)." Le système des villes européennes.

Table 1 Synergies with other research and innovation activities

Title and Year	Organization	Field/Thematic area	Outputs relevant to the project
Museums and Education in the North (2018-2020)	The Nordic Centre of Heritage Learning & Creativity	Collaboration between compulsory education and museums in Scandinavia	The research will produce analysis of similarities and differences in practices and policies in the field between Denmark, Norway, Sweden and Finland.
Jamtli Living University (2019-2021)	Jamtli Foundation	Pilot study on how to use traditional crafts and material in a climate and environmental smart way to produce modern ECO houses.	The pilot study will produce a report including an analysis of the practical, financial and political challenges in going from theory to practice.
Effective policies for durable and self-sustainable projects in the cultural heritage sector (KEEP ON) (2018-2023)	INORDE - Institute for Economic Development of Ourense Province	Detect good practices on sustainability of cultural heritage and then, based on the results of the findings, to make policy interventions	Both KEEP ON and SoPHIA projects aim to generate knowledge that would enhance sustainability of the cultural heritage so the mutual exchange of information and knowledge between the two projects would be beneficial to both of them.
Transition to Euphoria (2016-2021)	Eleusis 2021	European Capital of Culture – 3 thematic areas: environment, urbanization, working class	Statistics of scheduled events and long-term impact on heritage management and social behaviours
Open Heritage (2018-2021)	Metropolitan Research Institute (MRI)	EU H2020 project	Outputs related to territorial and planning evaluation concerning adapting reuse of cultural heritage
International network for leveraging successful cultural heritage Innovations and diplomacy, capacity building and awareness raising (ILUCIDARE) (2018-2021)	Katholieke Universiteit Leuven	Promote and leverage cultural heritage (CH)-led innovation and diplomacy through the creation and activation of an international community of CH practitioners in Europe and beyond	The exchanges of best practices, knowledge transfer, skills development and cross-fertilisation within its global network through an extensive use of digital engagement strategies and tools as well as participatory activities.

1.3.b. Organizational concept

SoPHIA's organizational concept stems from the need identified in the call to "bring together the research communities, heritage professionals, public and private actors and policy makers at local, regional, national and international levels concerned with the impact assessment and quality of interventions in historical environment and cultural heritage sites in Europe." In this context, the social platform itself is an instrument whereby cultural European stakeholders actively participate in the project aims through a diverse set of activities and tools.

1.3.b.1. Main groups and roles

In this sense, several groups have been conceived depending on their responsibilities within the project, their level of participation and their expected contribution. The **Scientific Core Group** is composed of the main scientific core partners who act both as **content providers and initiators** of the dialogues taking place within the social platform. They are also in charge of gathering and articulating the debate and coming up with conclusions that can be agreed upon by the entire consortium. This core group is composed of well-known scholars and experts in different fields and each brings to the table specific expertise so as to unveil the richness of each of the topics selected and explore interlinks between different axes and domains. An **Advisory Board** accompanies the scientific core group throughout the project to provide high-quality and focused advice. The SoPHIA formal consortium is made up of this core group and a **bridging organization** (Interarts, P2) which holds numerous ties to actors in the field of cultural heritage, identities and advocacy in Europe and beyond.

Given the complexity and heterogeneity of the field of cultural tangible and intangible heritage in Europe, the members of the **stakeholders' groups** have been divided into different groups. The **Academic Stakeholders'**

Group is composed of emerging and established scholars (as well as PhD students) from fields complementing the Scientific Core Group's expertise. They will act as **quality check providers** of the contents and proposals advanced by the Scientific Core Group, also providing **focused feedback on intermediate and final public documents**. The **Practitioner and Policy Stakeholders' Group** is the most heterogeneous: it combines practitioners, advocacy and umbrella organizations' staff members, and representatives from various levels of public administrations. Their input will be crucial for **testing the relevance of the discussion points** put forward by the Academic Stakeholders in the documentation for discussion and the several events organized along the project. They will give also fundamental input for the identification of case studies and the analysis of the testing process results, and for the identification of relevant topics to be included in the policy briefs, the toolkit and the guidelines and action plan for policies and programmes. Moreover, members of this network will be instrumental for identifying new members and informing the discussion on policy-making from the standpoint of everyday needs.

European policy-makers and European Commission representatives will be considered as **observers** along the entire project and their advice will be sought throughout the process. They will be invited to participate in all the events planned in the project and a unique policy-making event has been designed for them.

1.3.b.2. Making it happen

These different groups will interact directly face-to-face and virtually, via an online platform. The face-to-face meetings will include:

- Two main Workshops will happen during the project in two different WPs. They constitute a real moment for interaction and content production that will serve as the basis for broader consultation.
- A Stakeholders' Conference (WP2) will be the moment when all the members formally associated to the social platform meet to exchange views on the impact assessment model against the results of case studies and make recommendations to improve the model and to identify quality standards. Preparatory documentation will be circulated in advance mostly relying on email distribution lists.
- Leading up to the Stakeholders' Conference and during the analyses of case studies, different local workshops/focus groups (WP2) will be organized in collaboration with local organisations involved in the cultural heritage interventions analysed and assessed, as well as in policies and programmes at local level. These events will generate summaries and will be interconnected through via the participation of at least one of the Scientific Core Group members. Summaries will be part of the final report concerning the case studies that will be presented at the Stakeholders' Conference.
- The Final Public Conference will discuss in-depth the policy repercussions of the discussions and the work conducted by SoPHIA.

Needless to say, there are a number of informal and formal initiatives that may emerge from the interaction of members of the social platform and they will be taken into account and discussed as they appear, for example, a survey and discussions will be started to identify among the whole Social Platform the most relevant topics that will be subject of the policy briefs.

1.3.b.3. Strengthening the social platform

One of the main objectives of SoPHIA is to provide room for a wide range of views to be put in common on the part of the various stakeholders identified. Participation of representative actors is crucial to achieve such an objective. From the initial consortium members, the SoPHIA social platform will strive to achieve progressive enlargement as the project advances. Therefore, a specific enlargement process has been conceived including two enlargement moments described in this proposal (see below). Three strategies will be applied to improve the Social Platform's membership, namely:

1. A **snowball approach** from the recommendations of the initial Social Platform members;

2. Two formal **open calls** to invite relevant stakeholders to join the Social Platform; and lastly

3. The **on-line open consultations** at specific moments of the project (when documentation is produced for feedback) will provide the possibility for out-of-reach stakeholders to contribute to the project and, eventually, join the Social Platform.

A full work package (WP4) is devoted to the configuration and coordination of the Social Platform which, together with the overarching work plan, enlargement process, and interaction dynamics should contribute to consolidating it as a varied, open and renewable network with a shared work objective.

1.3.c. Gendered innovations

Gender issues are taken into account at two different levels: the **scientific content of the project** ("gendered innovations") and the **composition of the Social Platform**.

As regards the **scientific content**, there is already considerable expertise on gender issues in the team. In addition to incorporating gender perspective as related to the "people" axis and the different impact domains of heritage interventions, a gender approach will constitute a transversal focus in order counterbalance gender biases. Methodologically, this translates into the consideration of the gender component with respect to cultural participation and creativity as gender biases have led to accumulated gender inequalities in terms of women as decision makers also in the cultural sector and as recipients of cultural policies and programmes relating to heritage interventions. This means that activities and collective reflections will incorporate a specific section on the absence or presence (and the extent) of gender perspective in any given area. As part of the Social Platform, there will be a close interaction with stakeholders on gender issues to ensure that recommendations feed into policy-making. A significant part of cultural heritage in European cities is linked to women's history and identities, therefore all initiatives and interventions in tangible and intangible cultural heritage might have a potential negative impact if the gender perspective and the impact on women's identities and role are not taken into account.

In this framework, the case studies will also take into account the gender dimension and the positive and/or negative impacts that specific interventions may have had on the female population of a given community.

2.   IMPACT
2.1   Expected impacts
2.1.a. Project impacts

There has never been a true pan-European effort to bring together all the stakeholders interested in impact assessment of cultural heritage interventions. In this sense, SoPHIA represents an innovative and ground-breaking attempt to gather stakeholders from across Europe representing different organizations within the cultural eco-system and with different professional expertise. Together they build up a collective expertise representing all the four different domains (i.e. cultural, social economic and environmental ones) around the crucial issues at hand.

One of the main objectives of SoPHIA will be to offer a working network of scholars and stakeholders developing a collective reflection on the impact and quality of interventions in European historical environment and cultural heritage sites at urban level in order to promote a holistic impact assessment model, indicators and quality standards.

The social platform will be the think-tank in order to:
a) promote innovative and interdisciplinary research on a holistic impact assessment model and quality standards for cultural heritage interventions;
b) foster a collective reflection for the development of strategic and integrated European and international policies and interventions on these issues;
c) develop guidelines and toolkits to allow regional authorities together with local communities, to play an active role in the assessment of the quality of interventions in cultural heritage, in line with new participatory governance perspectives and;
d) promote innovative and interdisciplinary educational tools addressing the key issues identified.

Table 2:2.1.a. Impact by SoPHIA with indicators and targets

Impact expected by the call topic	Impacts expected by SoPHIA project	Indicators	Targets
The action will facilitate the uptake and dissemination of best practices […]	To take stock of existing EU and international policies, standards, guidelines, research and best and worst practices addressing the key issues identified.	Depth of the literature review. Mapping of the existing policies, standards, guidelines. Number of best and worst practices/case studies.	- After identification of existing and available research, at least 2 case studies per country concerning best/worst practices.
[…] thereby contributing	To foster an ongoing interaction	Engagement of EU	- Lively discussions around the

to the development of strategic and integrated European and international policies and interventions.	with policymakers that lays the basis for strategic and integrated European and international policies and interventions.	public officials. Positive feedback from policymakers formally involved in the project, especially EC representatives.	proposed research agenda and the project outputs.
It will contribute to the coordination of a variety of stakeholders and will develop toolkits and recommendations for them.	To contribute to the development of guidelines and toolkits to allow regional authorities, together with local communities, to play an active role in the assessment of the quality of interventions in cultural area.	Active participation from confirmed participants (local authorities and communities) and additional ones arriving in the enlargement rounds of the social platform. Number of local authorities and institutions testing the defined model.	- A virtual participation rate of at least 75% on the part of formal members, measured as having contributed at least once in writing. - A face-to-face participation rate of 50% on the part of formal members, measured as having taken part in any of the events organised. - At least 80% of informal and formal feedback received is positive. - At least 1 local authority or institution per country testing the model.
The platform will formulate recommendations and an action plan for future European action aiming towards harmonised impact assessment and intervention quality standards.	To stimulate a prolific debate among practioners, researchers and policy makers involved in cultural heritage interventions in order to convey the strategic view points of the stakeholders towards an agreed understanding on the quality of interventions.	Active participation from confirmed participants and additional ones joining the subsequent rounds of the Social Platform enlargement.	- Lively discussions around the proposed research agenda and the project outputs. - An increase in the Social Platform membership of at least 25% in the course of the two enlargement rounds.
It will also build a consensus on future needs […]	To increase awareness of local communities, policy makers, researchers, and professionals on critical issues and needs and to improve their abilities to play an active role in the assessment of the quality of interventions in cultural area.	Increasing and active frequentation of the website and videos made available by the platform.	- At least 100 views per month of the video made available by the platform. - At least 200 visit per Country of the Social Platform. - At least 3 meetings organized with citizens and their representatives.
[…] and will support the EU in developing an innovative and focused research agenda on cultural heritage and on the quality of interventions in historical environment and cultural heritage sites in Europe	To contribute to expand the current research/education on cultural heritage impact assessment and quality standards for cultural heritage interventions.	Design of an innovative holistic impact assessment model for interventions on cultural heritage.	- At least 3 publications on high quality journals. - Guidelines for on line higher educational programs.

2.1.a.1 Impacts for policy-makers
Expected impacts
SoPHIA aims to:
- increase awareness at EU and national/local levels about the importance of a holistic approach in evaluating the quality of interventions in cultural heritage sites;
- produce policy recommendations.

In addition to on-going communication, national dialogues will be organised to share lessons learned for policy-making. These events will target European, national and local policy makers; international organization representatives; and European Commission officials.

Outcomes/Indicators/target

Increase awareness at **EU level**:
- number of national workshops to disseminate the project results: 3 in different consortium partner countries
- number of total attendees to the conferences belonging to the different organisations involved in impact assessment of cultural heritage contributions: > 200
- number of EU public officials attending the conferences: at least 3

Increase awareness of **national/regional authorities**:
- number of representatives of national and local authorities attending the conferences, workshops: > 10
- number of municipalities receiving policy briefs/being informed about project results through email/newsletters/community of practice channels: >150

Adoption of the new model approach:
- number of local authorities and/or institutions interested in testing/applying the holistic method: 1 per country, based on letters of interest

2.1.a.2 Impacts for researchers

Expected impacts

Although the main aim of the Social Platform is not to produce scientific outputs, SoPHIA will produce the following academic outcomes:
(1) An innovative holistic impact assessment model as a stimulus to bring forward the scientific and academic debate.
(2) A series of contributions in leading international and national peer-reviewed journals, reviews and periodicals aimed at the scientific community.
(3) Ideas for enriching courses currently taught and for developing new academic teaching material for major higher education institutions at both the undergraduate/graduate levels and post-graduated level.

Outcomes/Indicators/Target

Increasing awareness of the scientific community:
- number of conference papers: at least 7
- essays and scientific publications: at least 3
- number of attendees to the conferences: at least 200

Increasing capabilities
- number of guidelines and tools to introduce the issues within high education: at least 1 test environment

2.1.a.3 Impacts for stakeholders

Expected impacts

As far as stakeholders are concerned, SoPHIA aims to create a space where stakeholders (local communities, professionals) can achieve a set of criteria to assess critical impacts and acquire capabilities in order to breakdown the existing perceived barriers preventing practitioners and local communities to play an active role in the assessment of the quality of interventions in cultural area.

Outcomes/Indicators/Target

Increasing awareness of **local communities (associations, groups, inhabitants)** and **professionals** through the toolbox/documentation on the Social Platform:
- total number of views per video on a dedicate YouTube channel: 100 views per month
- average number of visits to the Social Platform site: 200 per country per month

Increasing capabilities of **local communities (associations, groups, inhabitants)** and **professionals** through dedicated workshops/events/meetings:
- number of workshops/events/meetings with citizens and their representatives: at least 3

2.1.b Risks and corrective strategies

The main overall obstacle to achieving the proposed work plan stems from the complex dynamics that SoPHIA seeks to put in place: a substantive and a formal contribution to the field of impact assessment and quality standards for cultural heritage interventions by the merging of expertise coming from different domains. Four

risks could emerge at different stages of the project: one is the lack of commitment by some stakeholders that undermines both in-depth debate and the expected results in terms of a holistic assessment model. The second relates to difficulties in obtaining the access to the field to test the model. The third refers to the loss of key member(s) of co-ordination team and the four to the loss, or failure to deliver, of a partner in the core network

We have foreseen possible strategies to address these risks:

1) each partner will activate its network relations to substitute the missing stakeholders. In detail each partner of the consortium has prepared a list of possible substitutes in order to cover all the domains.
2) In case of difficulty in obtaining access to the field, the consortium will leverage the Social Platform in order to find out possible solutions and identify alternative case studies.
3) The proposed coordination team includes a number of experienced research leaders providing the robustness to absorb the loss of team members.
4) The extensive network of experienced partners would minimise the impact of failure in relation to network member. A Consortium Agreement (CA), will define the procedures to include a new partner, if needed.

2.2 Measures to maximise impact

The dissemination of outputs (towards the stakeholders' and the scientific community) and communication of the project (toward the general public) are transversal activities in SoPHIA and will play an important role in ensuring that the long-term goals of this project are achieved.

2.2.a. Dissemination and exploitation of results

The dissemination of the project results will aim at enabling their use and uptake among stakeholders by disclosing them using appropriate means, ranging from scientific publications to reports, policy briefs, training, conferences and workshops: the consortium will work toward transferring knowledge and results to those that can best make use of them, thus maximizing the impact of the project and enabling a circulation of results potentially wider than originally planned.

2.2.a.1. Dissemination and exploitation plan

The nature of the action (CSA) points to the critical dimension of offering mechanisms for effective participation of stakeholders and of providing relevant tools for the sector (as per the call, composed by research communities, heritage professionals, public and private actors and policy makers).

As already explained, **stakeholder engagement and empowerment** as providers of meaningful feedback for future research and policy-making is one of the *raisons d'être* of SoPHIA. Through this empowerment, stakeholders should embrace and take ownership of the project's outcomes, including the various outputs and the potential of further developments (including the Social Platforms sustainability).

Academic stakeholders belonging to the field of education, in particular tertiary and advanced education, will be strategic interlocutors since the different data, information and publications delivered within the project can be subject or part of educational programmes, such as masters' degrees and advanced education and training courses. The consortium will involve the academia and education stakeholders in the activities, creating synergies with existing courses that may use the materials produced and with education centres that may create in the future training and courses, including MOOCs (Massive Open Online Courses)

Among stakeholders, also **policy makers** are a key group for the Social Platform's impact. Therefore, a major dissemination challenge is how to make the relevant outputs accessible to policy makers. Indeed, this constitutes the second major dissemination goal of SoPHIA, namely **to strengthen cooperation between SoPHIA and policymaking**.

As explained in previous sections, transversal and group-specific interactions, events, and roles have been identified for academics, general stakeholders and policy makers.

The virtuous cycle in SoPHIA is based on ongoing interactions and consultations with the various stakeholders groups and audiences, as expressed in Figure 5 below:

Figure 5 Stakeholders' interactions
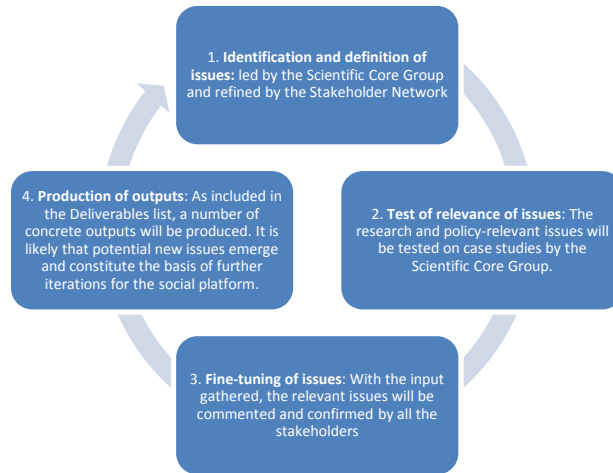
The dissemination and exploitation of the project results will aim at making an impact in **research and education**, but also in the **policy area** related both to impact assessment of cultural heritage interventions as well as of operational programmes at different levels (local, national, European, international). The project, in fact, will produce different **types of outputs**: operational practical tools for stakeholders interested in developing impact assessment and/or interventions on cultural heritage; a compendium of best practices to be taken as reference for further action; a set of policy briefs and recommendations about different topics related to cultural heritage interventions; guidelines for a research agenda and for operational programmes; guidelines for the development of public policies at European level.

This dissemination and exploitation plan will be better tailored and enhanced during the first month of the implementation period to reach target stakeholders at local, national, European and international level levels and to be published on CORDIS and will updated every 6 months.

2.2.a.2 Potential end-users and target groups

The target groups/potential end-users will be represented primarily by the different stakeholders that are involved in the Social Platform (those that have already been identified, and those that will join the platform throughout the project implementation) and that belong to different areas:

a. academia/research/education communities,
b. heritage professionals/practitioners,
c. public and private actors, civil society organisations,
d. policy makers at local, national, European and international level

and fields, namely cultural heritage, cultural economy, cultural environment, social sciences, cultural policies, urban planning and development, archaeology, architecture, cultural digitalization, cultural and creative sectors, tourism, etc.

Stakeholders participating in the Social Platform will have a critical role in ensuring a multiplier effect that will contribute to disseminate the project outputs and results among a much wider audience.

2.2.a.3 Channels to involve and contact potential end-users

<u>*The SoPHIA online platform*</u>

The first channel that will be used, and which is core to the whole action to ensure constant and systematic exchange, peer review and interactions between the main stakeholders participating in the Social Platform, who will also represent part of the end-users of the results, is the **SoPHIA online platform**.

It will be developed through an Open Source Enterprise Social Collaboration Platform (eXo Platform). It will be an online tool that allows relevant stakeholders, members of the Social Platform, to interact, exchange information, and be informed on best practices, research and policies relating to cultural heritage interventions, and will be actively contribute to the shaping and drafting of final project outputs.

The online platform will be linked to the **project website homepage** (www.sophia.net). The access will be restricted to users who have sent an access request and to whom access is granted. The online platform manager will grant or deny access to the restricted area.

Additionally, from the project website, the consortium and Advisory Board members will be able to join a restricted area specifically dedicated to the project management and joint work.

The SoPHIA online platform will be used to share knowledge between members, as well as those documents produced in the framework of the project. It will also represent a fundamental SharePoint for the consortium members to collect concrete contributions, suggestions, opinions by the professionals and stakeholders on the topics and issues identified by the consortium as regards the 3 axes and 4 domains linked to cultural heritage interventions. It will be the tool by which stakeholders actively and continuously participate in the project.

The SoPHIA online platform will be online and accessible from every device through the Internet. From the initial phases of the project, the online platform will offer to users:

- a Wiki area, where every member of the Social Platform can contribute to outlining relevant content and definitions;
- a forum area to open discussions and allow the whole community to interact on specific topics;
- a live chat for instant messaging;
- a personal cloud space for each member;
- a calendar to share the agenda and events;
- shared documentation tools, to work together simultaneously on documents (Google Drive APIs);
- a section to upload documents, videos, pictures;
- the possibility of interfacing external resources, e.g. databases;
- the possibility to create a profile for each user;
- the option to connect between one or more other users, to help follow their activities on the activity stream, but also improve communication and collaboration.

The workshops and conferences

Workshops and conferences developed within the project will involve the Social Platform members, but will always seek to reach the relevant professionals and policy makers at local and national level where the event will take place. They will participate as experts, speakers, or observers. The Final Public Conference will foresee a public moment, open to any interested audience upon registration, and will see the participation of local and national (Italian) policy makers and representatives of the main cultural institutions. In addition, the EC Policy Officer and other relevant representatives of the EU, UN (e.g. UNESCO), CoE, among other international players, will be invited.

After all workshops and conferences, the related reports will be published online on the SoPHIA project website and disseminated through the different available communication channels, such as the social media and newsletters both of the project and of the project partner organizations.

Meetings with stakeholders at local level during case studies' analyses

Such meetings will be relevant, in particular at local level, since they will foresee the active participation of local stakeholders that will give important information for the analysis of the case study and, if interested, will be kept informed about the project development, outputs and results. They will also be invited to use, adapt, and upscale the project's data, information and tools.

Dissemination through the partners' professional networks, events, publications

Project partners belong to or are involved with a series of **professional networks and organizations** which, in addition to those related to the Advisory Board members and Stakeholders' Network, will be approached and will receive periodic updates as regards project outputs and results, in order to reach a wide audience and maximise the project's impact:

Stakeholder name	Type	Field
CAE – Culture Action Europe	Civil society	European cultural policy
ENCATC - European network on cultural management and policy	Civil society and research	Cultural management and policy
ICOM – International Council of Museums	Research and scientific community	Museums

ICOMOS – International Council on Monuments and Sites	Research and scientific community	Heritage monuments and sites
International Association for the Study of the Commons (IASC)	Association of Researchers, Academics and Activists	Cultural, Urban, Natural and Digital commons
NEMO: Network of European Museum Organizations	Policy making	Museums
The International Association for the Study of the Culture of Cities (IASCC)	Association of Researchers, Academics and Policy Makers	Urban Studies, Cultural Studies, heritage sites and urban strategies
The Nordic Centre of Heritage Learning & Creativity	Research and development organisation which works for 11 larger museums and archives in Denmark, Norway, Sweden, Latvia and Lithuania	Pedagogical work archives, museums, galleries and historical sites.

Partners and Advisory Board members will also have the possibility to present the project outputs and results in front of different specialist publics in **events and conferences**, such as:

Event	Type	Field	Targeted end-users
Assemblée générale de l'ICOMOS et Symposium scientifique 2020	Annual general assembly	Cultural tangible heritage	Heritage professionals and policy makers
Beyond the Obvious – Annual conference of Culture Action Europe	Global	Culture	Cultural professionals and civil society
Changing Cities	International annual conference	Spatial, Design, Landscape & Socio-economic Dimensions	Academics, researchers
EUAH- European Association for Urban History Conference	Large-scale international conference	Urban History	Scholars
European Congress on the Use, Management and Conservation of Buildings of Historical Value		Cultural heritage management and conservation	Practitioners in the field of cultural heritage maintaining, preservation and management
European Group of Organization Studies annual conference	Large-scale Academic annual conference	Management (with a special interest group on management of cultural and creative industries)	Scholars
European Heritage Days	Cultural events	Cultural heritage	Heritage professionals, general public
Heritage NE - Newcastle	Seminar	Heritage: Managing Development in the Historic Environment	Urban Planners, City managers,
ICOM conferences	Global	Museums	Museum professionals
International Conference on Urban Regeneration and Sustainability	Conference	Sustainability in Urban planning	Urban Planners
International Forum on Knowledge Asset Dynamics (IFKAD)	Large-scale international conference	Knowledge Management (with a special track on arts and cultural management)	Scholars and practitioners
Places Matter – Annual Conference organised by the Arts Council Ireland and Local authority Arts Office Alliance.	Conference	Arts, Culture, Local authorities	Arts sector, Culture sector, Planners, City managers,
The European Museum Academy award ceremony, autumn 2021 (location not decided)	Sectoral conference	Museums from all over Europe	Museum directors, politicians and researchers
The International Association for the Study of the Culture of Cities IASCC	International interdisciplinary forum	Urban Studies	Academics, researchers
The NCK (Nordic Centre of Heritage Learning and Creativity) spring conference 2021 in Östersund, Sweden	Regional conference	Museums and archives and universities in Scandinavia and the Baltics	Pedagogical staff and heritage learning researchers
UNESCO conference 2020	Global	International cultural	Cultural professionals,

		policy	policy makers
University Network of the European Capitals of Culture (UNeECC)	Academic and educational institutional collaboration	Cultural heritage	Scholars, Policy Makers
OpenHouse|Athens	Annual Architectural Tours Festival in Athens	Architecture, Cultural heritage	Scholars, cultural professionals

Partners and Advisory Board members, most of who are researchers and scholars, will be able to write articles to be published on relevant **scientific journals and publications** related to the project results, such as:

Journal	Type	Field	Targeted end-users
Arts Management Quarterly	Quarterly	Arts Management	Academics, Experts, Professionals
City, Culture, Society	Journal	Cultural Heritage	Academics, Experts, Professionals
Economia della Cultura	Academic journal	Economy of culture	Scientific community
European Cultural Foundation Labs	Open platform	European Cultural cooperation	European Cultural community
Heritage Ireland – Quarterly publication of the Heritage Ireland Agency	News Journal	Heritage	Workers across the Heritage, Archaeology sectors
History Ireland	Irish History Magazine	History	Historians, and general readers
International Journal of Cultural Policy Research	E-journal	Cultural Policy	Researchers
International Journal of Cultural Studies	Peer-reviewed academic journal	Cultural Studies	Cultural Studies Scholars and Students and general readers
International Journal of Heritage Studies	Scientific	Humanities	Scientific community
Irish Journal of Arts Management and Cultural Policy	E-journal	Cultural Policy, Arts Management	Cultural Studies Scholars and Students and general readers
Journal of Cultural Heritage	Journal	Cultural Heritage	Academics, Experts, Professionals
Organization Studies	Academic refereed journal	Management	Scholars
Passos - Journal of Tourism and Cultural Heritage	Scientific	Social Sciences	Scientific community
Quaderni di Urbanistica Tre	Academic refereed journal	Urban planning	Scholars
Roma moderna e contemporanea	Academic refereed journal	Urban history	Scholars
Society and Space	Interdisciplinary academic journal	Environment, Planning, Public Space	Urban Planners, City managers,
The Journal of Arts Management, Law, and Society	Academic refereed journal	Cultural heritage management	Scholars, Professionals

2.2.a.4 Exploitation of the project tools and results after the end of the project

<u>Online tools</u>

All the materials produced within the project will be published on the SoPHIA project website and will be accessible there, but also on the partners' own websites. The SoPHIA website will aim at being the on-line hub for all those working on or interested in cultural heritage interventions and related policies, quality standards and assessment models. The project will also combine various channels and partners' social media where information about the project will be available. This will facilitate the further exploitation of the results by its accessibility and easy sharing of documents.

In addition, in order to guarantee the SoPHIA social platform sustainability, the website will be designed and developed to meet the community's need will contribute to ensure that users, finding the platform useful, will

continue to use it after the end of the project. Securing involvement, interest and continued participation of the SoPHIA social platform stakeholders is one of the key aspects for sustainability of the project.

The online platform is built on an existing eXo platform already in use and managed by Interarts, that will continue to be online and accessible also after the project has ended. As a consequence, stakeholders that refer to the "on-line hub" represented by the website who will request access will be able to use the tools for exchange and interaction, as well as follow previous discussions and download relevant working documents from the platform after the project has ended.

In addition, the consortium will consider applying for an EU-funded COST Action which specifically funds pan-European networks and trans-national cooperation among researchers, engineers and scholars across Europe. The COST Action would allow further joint work of the whole Social Platform for several additional years and support not only its sustainability but also its further development.

Overall, the underlying idea of the Social Platform is that it should potentially operate as a "watchdog" community. Indeed, it should not only serve the purpose of a dedicated and specialised community of stakeholders; it should also ideally serve the wider European citizen community, as a "safe space" where to address questions and receive answers by experts.

<u>Education and training</u>

The materials produced will also be made available for existing education and training courses, for example:

Course	Field
Post-graduate International Master in Master Program in Culture of the Heritages Knowledge, protection, enhancement, management (2-years program) – Roma Tre University	Cultural economics, management, humanities
Post-graduate Master in Management, Promotion and Technological Innovation in Cultural Heritage Management (1-year program) – Roma Tre University	Cultural economics, management, humanities
Master "Environmental humanities" – Roma Tre University	Higher education
IES Abroad Italy and related European Schools	Higher education
Postgraduate studies programme 1A (NTUA)	Architecture - Spatial Design, Design - Theory
Postgraduate studies programme 2 (NTUA)	Conservation and Restoration of Historic Buildings and Sites

Materials will also be made available to partner education institutions to possibly create a MOOC (Massive Open Online Course).

2.2.a.5 Management of data generated and/or collected

Data related to current research, past or current interventions, assessment already performed, policies and programmes, etc. will be collected in order to generate an impact assessment model, a collection of best practices, case studies analysis reports, policy papers and recommendations.

These data are normally public and will be published on the project and the project partners' websites and social media. In case confidential data is collected, e.g. the information collected through interviews to key actors in the analysis of case studies, which will be recorded and transcribed for internal use only, the Coordinator P1 will make sure that this is not published on open access repositories. For privacy reasons will be prevented the full disclosure of the raw data generated within the project. Data will be safely stored on the Roma3 servers and could be accessed only through authorized accounts. This will ensure data privacy and safe storage.

Nevertheless, randomized, aggregated, and anonymized collections of data will be made available either through the project website or through open access publications that will be produced as outputs of the project.

Information generated will be published in digital formats, normally .pdf, .xhtml, and .png.

Internal working documents will be circulated only through the online platform and will be accessible for those who have been granted access.

P1 and P2, at the beginning of the project, will create a detailed **Data Management Plan** that will be delivered in M6 in its first version and refined based on the EC's suggestions to reach a final version in M9.

2.2.a.6 Strategies for knowledge management and protection

IPR Management: All project results will be disseminated, either through publications, website and other

means described in WP5. Each beneficiary shall be the holder of copyright on the results he published and shall allow the other beneficiaries access to these results. If two or more beneficiaries elaborate a joint publication, they shall regulate among themselves the share and the exploitation of the copyright.

As regards knowledge protection and management, the Consortium shall observe the rules set out by the legal basis of H2020. Such rules will be implemented, specified and integrated by means of the Consortium Agreement (CA) and other arrangements between partners. The CA and all additional agreements will regulate the property, the protection, the exploitation and the access to the results arising from the project.

The IPR strategy, which will be reflected in the CA, will take into consideration the following principles.

* each partner, in a positive list, will specify the background which will be made available to the other beneficiaries in order to perform the project research activities;

* the Consortium will stimulate the application of patents as much as possible. Patents will be filed by the beneficiaries involved in the research generating the results. If two or more beneficiaries are involved in such research, they will agree between themselves their shares of property and the modality of exploitation. The joint exploitation will be encouraged. If a beneficiary intends to withdraw from the exploitation, its rights will be attributed to the other co-owner(s) against a reasonable compensation;

* the owner or co-owners interested in the exploitation of the results will be responsible for providing financial means needed for the protection of the newly generated results;

* the beneficiaries which are not owners or co-owners of the results shall be entitled to an easy and royalty-free access to such results in order to perform the research tasks foreseen in the project. The access will be granted on the basis of an agreement specifying the access modalities;

* the Consortium, by means of dissemination and communication activities tailored to each audience type, will disseminate and promote all results and outputs generated by the project, highlighting that they have been achieved with the financial support of H2020, as provided in the Grant Agreement;

* the dissemination and publication strategy concerning the results will be tackled by the Exploitation Committee, whose members will be appointed at the kick-off meeting, and which will interact with the other management boards (as described in Section …), in order to legitimate and protect the interests of the owners of the results;

* each beneficiary shall ensure that no agreements will be stipulated which are in contrast with the above-mentioned provisions to be observed by employees, consultants, service providers, suppliers, post-docs and/or students.

Open access: Foreground documents provided as main deliverables of the project (except articles published on scientific journals), as previously explained herein, will be granted open access through self-archiving ("green" open access) on the project website. An open access publishing policy ("gold" open access) will be adopted by primarily submitting manuscripts to journals and publishers that immediately provide "open access mode" to scientific publications which might result from the project. Where possible, the project will publish in fully open access journals or will pay additional fees, in case publishers will allow this, so that open access will be granted (gold open access). The associated costs have been considered within the requested funding. For those publications where this will not be possible, a machine-readable electronic copy of the published version or final peer-reviewed manuscript accepted for publication will be deposited in a repository for scientific publications. The Open Access Infrastructure for Research in Europe (OpenAire) will be consulted to determine what repository to choose. At the same time the research data needed to validate the results presented in the deposited scientific publications will also be deposited into a data repository (green open access). The consortium will respect the provisions contained on the Recommendations on Open access to Scientific Publication and Research Data in Horizon 2020 will be adopt a policy on open access to publications and research data.

2.2.b. Communication activities

One work package, WP5 is devoted to dissemination and communication with actions aimed at increasing the level of participation, engagement and ownership of the social platform with a view to co-producing a research agenda on cultural heritage and identity in Europe. WP5 is led by a leading organization in the field of cultural policy analysis and advocacy highly regarded in international fora and with numerous contacts with actors and networks in the field.

An initial identification of relevant target groups has been conducted in the proposal preparation phase of SoPHIA. As explained in section 3.3.c. (Stakeholder Network) there are three main target audiences: practitioners, policy-makers and education/academia/researchers. The first one constitutes the target group of Partner 2's main actions: Interarts has been very active in the emerging European debates on culture stemming from civil society and cultural stakeholders (not only those promoted by the European Commission). It is highly regarded in the sector and it has long-time experience in creating the right communication flows and efficient dissemination tools to maximize impact.

P1 and P2 will produce a strategy document at the beginning of the project including an in-depth audience analysis; a detailed action plan; and an evaluation plan (to be carried out in the middle and at the end of the project).

Moreover, professional designers will be mobilized at the beginning of the project to define a powerful visual image for the project. Indeed, a **unified visual image** will help achieve a project branding and a basic visual consistency across all project communication pieces, something crucial to create a sense of belonging. In addition to a visual identity (logo, styles), a basic presentation of project facts and goals ("Fact Sheet") will be created and updated as the project evolves. Basic visual and content elements to be used on printed materials, presentations, websites, etc. will be provided to members of the Social Platform. As explained in the description of WP5, several specific communication actions will be implemented during the duration of the project.

3. IMPLEMENTATION

3.1 Work plan – Work packages and deliverables

To achieve the objectives, the work is divided into six work packages, each of them with a coordinator responsible for the tasks and deliverables associated with it. The organizational structure (section 1.3.b) supports the sharing of tasks and the ongoing interaction among members of the consortium, the Advisory Board and the other units of the social platform.

The scientific work packages are 1-3; while **work packages 4 and 5 relate to the impact of the social platform** and **work package 6 oversees the coordination and management** of the project, both administrative and scientific.

Work package 1 conducts a survey of existing research and related policies to map existing and emerging problems, practices and policy gaps relating to the impact assessment and the quality of interventions in historical environment and cultural heritage sites in Europe via a structured dialogue with the Advisory Board and with a plural and representative selection of stakeholders. This work package will also include the development of a model for a cross-sectoral holistic impact assessment for interventions on cultural heritage.

Work package 2 includes an in-depth analysis of the themes identified resulting in a theoretical view on the Thematic Areas including best practices at European and international level, the keys of change and the problems and social potentials associated to them. The impact assessment model, to test its universal applicability, will be tested in different contexts through the analysis of relevant case studies.

Building on the knowledge gained from the results and outputs of WP1 and WP2, **Work package 3** focuses on producing specific outputs for research (stakeholders) and policy-making (especially the EU), It constitutes a crucial moment of synthesis of the project and combines several methodologies and means of interaction with relevant stakeholders ranging from co-production of documents to participation in face-to-face meetings. This WP will result in concrete and applicable recommendations and a toolkit for policy makers and heritage professionals. Namely a) toolkit and recommendations for the stakeholders involved in the social platform, b) recommendations for future European action aiming towards harmonised impact assessment and intervention quality standards, including an innovative model with a specific set of indicators for the impact assessment of the interventions on cultural heritage and landscapes, c) research agendas and guidelines for policy intervention in this area contributing to the development of strategic and integrated European and international policies and interventions.

Work package 4 is concerned with the right functioning of the social platform in terms of its structure, communication, governance, enlargement and sustainability. Considering the nature of the project, this is a key work package requiring extended expertise and ongoing communication with members.

Work package 5 develops and implements dissemination and exploitation and communication strategies. Concern for dissemination and applicability will not be an afterthought, but an ongoing process throughout the

project. Interarts will be responsible for the development and implementation of the dissemination strategy from day one. This involves a combination of traditional and innovative modes of communication, that will benefit from and lean on the tools generated by the fourth industrial revolution, aiming at generating an efficient communication system and a valuable information flow and publicity about the results.

Work package 6 sets up the scientific coordination of the project. The Coordinator will ensure that collaboration proceeds efficiently so that researchers and stakeholders can focus their energy on producing the results envisioned for the project. In addition, it bundles the non-scientific management of the project and focuses on the high-quality and timely completion of tasks and production of deliverables.

Table 3.1 a: List of work packages (WP)

WP No	WP Title	Lead Participant No	Lead Participant Short Name	Person-Months	Start Month	End month
1	Survey of existing research and related policies	P5	NTUA	29,75	1	7
2	In-depth analysis of case studies	P4	EDUCULT	39,75	8	15
3	Recommendations and agenda setting	P7	IRMO	31,45	16	24
4	Social platform configuration and coordination	P2	IA	38,50	1	24
5	Communication and dissemination	P2	IA	31,50	1	24
6	Project management and scientific coordination	P1	Roma3	22,55	1	24
				193,50		

Figure 6 Time chart

Month/WP	1	2	3	4	5	6	7	8	9	10	11	12
WP1					D1.1	MS1	D1.2 D1.3 MS2					
WP2									D2.1 MS3			
WP3												
WP4					D4.2		D4.2					D4.1 D4.3
WP5	D5.3 D5.4	D5.5	D5.1	D5.2 D5.5 MS7		D5.5		D5.5		D5.5		D5.4 D5.5
WP6		D6.1				D6.3			D6.3			D6.2

Month/WP	13	14	15	16	17	18	19	20	21	22	23	24
WP1												

WP2		D2.2 MS4	D2.3 D2.4									
WP3						D3.1 D3.2 MS5			D3.3	D3.5 MS6	D3.4	
WP4					D4.4							
WP5		D5.5		D5.5		D5.5		D5.5	D5.5		D5.4 D5.5	
WP6											D6.4	

Figure 7 Project components
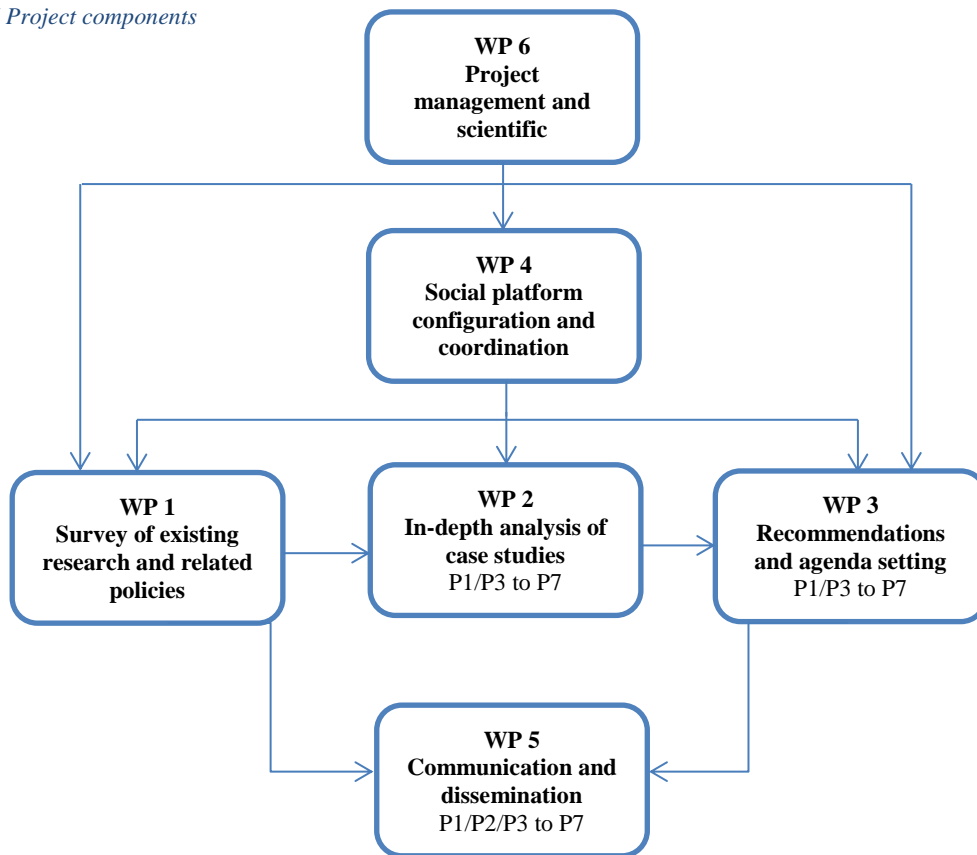
Table 3.1 b: Work package description

Work package number	**1**		Lead beneficiary			NTUA	
Work package title	Survey of existing research and related policies						
Participant number	1	2	3	4	5	6	7
Short name of participant	Roma3	IA	EMA	EDUCULT	NTUA	IADT	IRMO
Person months per participant:	3,75	2	2,5	2,5	10	3	6
Start month	1			End month			7

Objectives

To make an extensive review of the research literature and related policies in the 4 domains (social, cultural, environmental, economic) and map existing research, policies and practices relating to impact assessment of intervention in cultural heritage in Europe.

To identify gaps and problems relating to the impact assessment and quality of interventions related to the 4 domains.

To organize a first workshop with a select group of stakeholders and the Advisory Board and to prioritise the

types and areas of interventions and policies that will be analysed throughout the project.

To select indicators and develop a model for a cross-sectoral holistic impact assessment for interventions on cultural heritage.

Description of work

The current situation will be analysed in all four domains (cultural, social, economic, environmental), to be later tested against the holistic impact assessment model to be developed. Where necessary, to be complemented by reviewing additional relevant raw data through the social platform discussions as well as a cross-sectional investigation of all sources of information which serve as indicators (journals and press, media and public opinion of selected scientific papers, articles from newspaper and blog sites, relevant Facebook groups and social media visitors comments, etc.).

The lead partner of WP1 (P5) coordinates the work package, coordinating inputs from partners for the contributions to the research and mapping and prepares relevant material to be distributed to all participants, ensures communication and organizes and facilitates the first workshop.

T1.1 Review of research literature, policy programmes and (good and bad) practices.(M1-M4)

Leader: NTUA. Participants: Roma3, EMA, EDUCULT, IADT, IRMO

The first step will be to elaborate a review of the research literatures and policy programmes in the four domains under consideration relating to impact assessment and interventions in cultural heritage and environment. This review will be undertaken by six partners in the consortium (P1, P3-7), specialists in their respective fields and who share a broad interdisciplinary view on them. The review will aim to identify main issues, practices and main policy programmes relating to interventions in European historical environment and cultural heritage sites, including a prospective view of them, and to allow for a contrast between the kind of assessment done and the kind of policies developed. The research strategy will comprise journals, books, reports of the different funding programmes and funded projects, essays and articles on impact assessment methodologies, relevant European and non-European databases, and policy databases such as the Compendium on Cultural Policies and Trends as well as the exploration of citation indexes such as Web of Science and, when considered necessary, the consultation of other topic experts. As for its qualitative aspect, the review will focus on state-of-the art texts. First, a selection of relevant research literature strands and of initial search categories will be done. Then the search will proceed guided by the following questions:

- What are the main current research trends in the field (in terms of having received more attention)?
- What are the main policy programmes and required quality standards in the field (in terms of being the more common)?
- What are the gaps and opportunities of the current level of impact assessment identified in the field?
- What are the more strategic and policy-relevant issues identified so far in the literature by different experts?

Each partner will contribute according to an initial detailed plan shared by the WP1 lead partner (P5) and will provide a first draft of their research by M2. In conducting the research the partners will have the possibility to interview and/or ask stakeholders belonging to the Social Platform for their suggestions/opinions/ideas.

The WP1 lead partner will collect suggested references from the partners and combine them in one report which will comprise an overall/general presentation of the current situation and foreseen trends. This initial document will be circulated among Advisory Board members, to obtain their feedback and approval. Partners will apply the modifications suggested by the Advisory Board and share the revised document with relevant stakeholders by M3 in order to obtain their feedback and contributions. P2 will ensure continued and fluent communication within the Social Platform (partners, Advisory Board and stakeholders).

P5 will finally collect all contributions and refine the general introduction. The final document will comprise essays/sections produced by the different project partners and experts participating in the study.

The research will be conducted at different levels, in particular as regards policies and programmes: national, regional and European. Each partner will be responsible for a specific area according to its location, network of contacts and stakeholders and previous expertise in specific countries or regions.

T1.2 Mapping of existing gaps, issues and problems (M4-M5).

Leader: NTUA **Participants**: Roma3, IA, EMA, EDUCULT, IADT, IRMO

Drawn from the research carried out within Task 1.1, and taking into account all remarks and contributions by the Social Platform, P5 will provide a comprehensive mapping of existing gaps, issues and problems to be submitted to Advisory Board and stakeholders in M2 a first draft will be circulated within the Advisory Board, and, after the integration of the Board's suggestions, it will be shared with the stakeholders in M3 for in depth comments and contributions.

T1.3 First workshop with Advisory Board and Stakeholders (M5-M6)
Leader: NTUA. **Participants**: All partners
To be held in Athens, the workshop will encompass discussions on the 4 domains to discuss on policy gaps and practices, but also on the methods and indicators for the model to be proposed and tested for impact assessment. Advisory Board members and stakeholders will receive in M5 the map document on gaps, issues, problems and a discussion paper (first draft of the model) to prepare the discussion and their contributions to the impact assessment model. Participants in the workshop will be divided in 4 groups, one per each domain and a final plenary session will allow reaching a consensus for first guidelines document for the impact assessment model. On this occasion, **a first call for new stakeholders** will be carried out, capitalising on the multiplier effect related to the presence of many different experts and professionals. Outcomes of the workshop will be the validated mapping and the Advisory Board and stakeholders' feedback and recommendations for the impact assessment model. Maximum 50 participants.

T1.4 Elaboration of an impact assessment model (M4-M7)
Leader: IADT **Participants**: Roma3, IA, EMA, EDUCULT, IADT, IRMO
Comments collected in particular during the first workshop will be taken into consideration, as well as the results of the workshops towards the elaboration of an impact assessment model and of the sustainability and resilience indicators. Also, the results of the research and the mapping will nurture the elaboration of the model which will capitalise on current models and policies.

In M7 the first version of the impact assessment model will be completed and released to the Social Platform on the eXo online platform with restricted access. The final version (version 2), refined after its testing during WP2 will be published on the project website and to be made public.

Deliverables
D1.1 A concise essay mapping existing gaps, issues and problems (M5)
Proposed structure:
1. Introduction
2. Purpose and goals
3. Methodology
4. Part I: Existing and emerging problems, issues, practices and policy gaps
5. Conclusions
6. Bibliography

D1.2 Impact assessment model (M7)
1. Part II: A methodology towards the development of an Impact Assessment model
2. Part III: Impact Assessment model
3. Expectations, foreseeable limitations

D1.3 A digital mapping tool in the project website with extensive filters (M7)
It will be part of the toolkit for stakeholders and will be published on the SoPHIA website.

Work package number	2		Lead beneficiary		EDUCULT	
Work package title	In-depth analysis of case studies					
Participant number	1	2	3	4	5	6	7
Short name of participant	Roma3	IA	EMA	EDUCULT	NTUA	IADT	IRMO
Person months per participant:	5,75	1	6	8	6	6	7
Start month	8			End month		15	

Objectives
To analyse and map best practices related to both impact assessment and quality of interventions taking into account the 4 domains.
To select relevant case studies of interventions to test the draft model.
To test the impact assessment model in different contexts through the analysis of relevant case studies.

Description of work
T2.1 Mapping and selecting best practices for impact assessment and quality interventions (M8-M9)
Leader: EDUCULT. **Partners**: Roma3, EMA, NTUA, IADT, IRMO
Taking into account the theoretical aspect discussed in WP1 a set of criteria for mapping and selecting best

practices are defined in order to ensure the comparability of the observation units. The analysis will include a minimum of 6 and a maximum of 12 cases.

One of the criteria for the selection of the case studies is its **geographical location**, because a central aim of the analysis is to cover a wide range of countries and EU Member States. In terms of their location, cases from an urban context will be identified in order to ensure that the urban aspect and its relevance to the characterization of the European Union as an urban long-lived and reticular system, as defined in chapter 1.3 (Cattan, Pumain et al. 1994), is taken into account.

Yet, the range and variety of the cases is not only defined by their location but also by the nature of the intervention and the **typology of funding** by different donors (e.g. UNESCO, EU, Members States, regional and local administrations). Case studies are understood as representative of the diverse funding opportunities; consequently, the selection of good practices ensures that all main forms of funding opportunities identified are covered in the case study analysis.

Furthermore, different regulatory levels and, therefore, different ways of funding and programming interventions, identifying quality standards and assessing interventions at the national, regional, European level will be taken into account.

Apart from the geographical location and the type of funding as the main selection criteria of the best practice examples, other selection factors will be taken into account depending on their relevance and in order to ensure and structure the comparison of the analysed units. Factors that need to be considered are **the progress of implementation of the intervention**, the **relevance to other national and international initiatives of cultural heritage recognition**, **size of the intervention** and **typology of cultural heritage**, as well as additional factors that transpired to be relevant during the general mapping of the interventions in WP1. These inductive factors, defined in the course of the analysis, will ensure the flexibility and alignment of the methodology.

Furthermore, the cases of excellence will mirror in the reference to bad practices. This means that reference to bad practices, specifically in their difficulties relating to the criteria of best practices are made, however not as separate analysis or chapters, but always relating to the best practice examples. The selection of best practices will finally be illustrated in the visual mapping of the cases.

The methodology for the mapping will be shared with the Advisory Board to be validated in M8. In addition, the selection of the case studies will take into account suggestions by the stakeholders identified during the first workshop (M6). Stakeholders, through the online platform will be invited to give inputs to the case studies' analyses.

T2.2 Testing of the impact assessment model through a participatory approach (M9 - M14)
Leader: IADT **Participants**: Roma3, EMA, NTUA, IADT, IRMO

The perspective of people and stakeholders is a central aspect of the model of impact assessment as drafted in WP1. This perspective methodologically implies the importance of the stakeholders' view in assessing the impact of the interventions. As mentioned before the principle behind a multi-stakeholder perspective is that it gains more legitimacy by reflecting on the various interests rather than on a single source of validation. Therefore, main data collected to assess an impact of an intervention are various stakeholder perspectives on it and for the methodology this means a participatory approach also when collecting data and defining the assessment process.

Therefore, participatory and dialogue-oriented research methods are chosen. Since participatory research methods are aimed at planning and conducting the research process together with the people whose world is being studied, the stakeholders are involved at all stages of investigation. By these means, in each case of testing the impact assessment model at the case studies, the relevant stakeholders are involved in defining the objectives, reflecting the course of the assessment and commenting on the findings of the assessment at the end, also by using the possibilities the social platform offers. Furthermore, data collection methods are chosen that make sure that a variety of perspectives can be taken into account.

Focus groups are an especially effective method to discuss central topics of an evaluation with a variety of stakeholders and aggregate a broad range of data on different perspectives regarding a main evaluation question in a relatively short period of time. They help to better develop and reflect on strengths and challenges, as well as needs in the implementation of specific projects or programmes. Specifically, the dynamic character of the method provides differentiated in-depth responses that come as a reaction to each other's and thereby can also cover areas / topics that have not yet been addressed through other data collection methods. Similar group discussion methods with an explicit participatory character, such as fish bowls or world cafes may also be applied but may specifically be helpful in accompanying the testing of the impact assessment model on a local level. By these means the analysis of case studies foresees at least one travel of a partner representative to the site/case study under investigation in order to ensure that at least one group

discussion at the case study location can be implemented.

Each partner will provide a first draft of their case study research by M12. The WP2 lead partner will combine the research in one report. This initial document will be circulated among Advisory Board members, to obtain their feedback and approval. Partners will apply the modifications suggested by the Advisory Board and discuss the document with relevant stakeholders at the Stakeholders' Conference in Vienna by M14 in order to obtain their feedback and contributions.

Examples of the diversity and typology of possible case studies are:

Eleusis (better known today as Elefsina), is a town situated 20 km away from the city of Athens with a population of 30,000 inhabitants known for its ancient and modern industrial history. In antiquity and for almost 2000 years (eg 1600-400 AD) it was considered to be one of the five holy cities, and the Eleusinian Mysteries attracted pilgrims from all over the known world. Thanks to the great tragic poet Aeschylus, Eleusis remained known in the ancient world as well as in our times. Eleusis 2021 European Capital of Europe is an attempt to systematize the vocabulary of EUphoria, the proposed innovative cultural process by highlighting the relationships between sustainability, art and culture and their connection with all of human activities.

The **Temple Bar Area** was developed as the cultural quarter of Dublin city from 1991 to the mid-2000s. The seed of the idea was generated during Dublin's year as European Capital of Culture. Previous to the cultural quarter plan, the area had been planned for demolition for the development of a transport hub for buses and trains in the city centre. The project is held in high regard internationally as a leading example of a culture led urban regeneration. The urban planner John Montgomery most notably has written a number of articles on its success as an area. Heritage played a major role in the redevelopment which makes it an interesting case study for the SoPHIA project. It was understood that heritage was an essential component linking old and new architecture. Architects were given the freedom to mix old and new to create a unique urban topography. It is coming close to 30 years since the projects inception and it would be a good time to evaluate the impact and use of this space by and for citizens and tourists alike.

T2.3 Stakeholders' Conference with stakeholders from all case studies; refinement of the model. (M12-M13)

Leader: EDUCULT **Participants**: All partners

As highlighted above, the selection of case studies is influenced by the perspective of the representatives of the main stakeholders' groups who are brought together at the fist workshop in Athens during which central themes, challenges and possibilities of the assessment are discussed as well as expectations by the stakeholders are defined. After testing the models in the case studies, the stakeholders are once again brought together at the end of the process in a conference at the European Heritage Label site of the Imperial Palace in Vienna. This will help to reflect on the findings of the case studies. If necessary, the **impact assessment model is refined after this final reflection**. On this occasion, a second call for stakeholders will be launched (on the project website and social media) that will result in an updated list of member stakeholders.

Finally, on this occasion a first selection of topics to be addressed in the policy briefs (WP3) will be presented to the stakeholders (e.g. intervention on heritage and resilience of societies, the role of digital technologies and their impact on tangible and intangible heritage, etc.). After the conference, the consortium will conduct a survey among stakeholders through the online platform that will be closed in M15, to definitively select the most relevant topics for policy briefs. Expected number of participants: maximum 70 people.

Deliverables

D2.1 Map of best practices (M9)

The map of best practices, that will be published online and drafted with the support of the stakeholders, will also contain some "bad practices" examples, since failures and their analysis may help to identify criticalities and improve approaches.

D2.2 Reports of the analysis of case studies (M14)

The reports will be collected and used by the project partners to refine the assessment model.

D2.3 Final refined model (M15)

The final model will be published on the project website.

D2.4 Updated list of stakeholders (M15)

The list of stakeholders will be updated after the second call. The list will not be published for privacy reasons.

Work package number	3	Lead beneficiary				IRMO	
Work package title	Recommendations and agenda setting						
Participant number	1	2	3	4	5	6	7

Short name of participant	Roma3	IA	EMA	EDUCULT	NTUA	IADT	IRMO
Person months per participant:	6,95	0,5	3	3	3	3	12
Start month	16			End month		24	

Objectives

To produce a toolkit for practitioners and other stakeholders that includes recommendations for impact assessment and related quality standards.

To formulate 4 recommendations in the format of policy briefs on topics emerged throughout the project and validated by stakeholders.

To produce guidelines as a basis an EU's action plan regarding: 1. Operational programmes related to interventions on cultural heritage and innovative and focused research; 2. Public policies on quality interventions in cultural heritage in the EU.

The general task of this work package is to enable mainstreaming the insights gained in WP1 and WP2 to a broader scope of heritage and policy stakeholders, in the appropriate format. The goal is to include consortium partners, Advisory Board members and relevant stakeholders in the process of reflection on the knowledge generated through SoPHIA and in the final validation on the proposed impact assessment model and translate the outcomes of WP1 and WP2 into relevant policy recommendations/operational programmes, as well as, the practical toolkit for heritage professionals.

WP3 includes 5 tasks: 2 meetings to gather relevant stakeholders (one workshop and one final public conference) will be organised and the synthesis of the previous analytical tasks will result in relevant recommendations for policy makers and heritage practitioners and accompanying toolkit.

Based on the map of gaps and challenges (WP1), the best practices and the outcomes of the case studies discussed in the Stakeholders' Conference (WP2), the different partners will draft discussion papers, that include the related key policy issues, to be shared with the Advisory Board and be discussed with stakeholders during the second workshop to be held in Dublin, in order to guide the partners' action for the production of the last deliverables.

T3.1 Development of a toolkit for stakeholders comprising: best practices, case studies reports, impact assessment model and recommendation on intervention quality standards (M16-M19)

Leader: IRMO **Partners**: Roma3, NTUA, EDUCULT, EMA, IADT

In M18 a draft of the toolkit will be circulated within the consortium and shared with the Advisory Board and, after the integration of the Board's suggestions, it will be shared with the stakeholders in M19 for their final comments and contributions. Inputs collected will be taken into consideration in the preparation of the toolkit that will include: impact assessment model, best practices identified, and report on the analysis and research outcomes of the SoPHIA project in a concise form.

T3.2 Workshop for discussions on the discussion papers to outline recommendations and policy guidelines (M18-M19)

Leader: IADT **Partners**: All partners

The second workshop will be held in Dublin, in collaboration with the with the local authority and the local heritage office. It will last two days and stakeholders and Advisory Board members will be invited to work together on the documents related to the 4 topics identified between M13 and M15.

Draft discussion papers for the policy briefs and the 2 strands included in the guidelines will be prepared by the relevant partners, assisted by external experts and stakeholders if needed, on the bases of their expertise and main area of work, and shared with the workshop participants.

The guiding questions for the workshop will be:

1. Are the main challenges of the identified topic properly addressed? What are the desired measures?
2. What are the main innovations as regards research in the field?
3. Are the policy issues identified the most crucial for solving problems and enhancing opportunities in each field considered?

Expected number of participants: maximum 50 people.

T3.3 Production of recommendations and policy documents (M19-M24)

Leader: IRMO. **Partners**: Roma3, NTUA, EDUCULT, EMA, IADT

On the basis of the accumulated materials and the conclusions of the meetings, the partners will proceed to draw from the four articulating perspectives of the project, two types of approaches: first, the definition of the main policy implications and related recommendations on different specific relevant topics (D3.3) and, secondly (D3.4), the justification and specification of guidelines for policy intervention in this area, and

recommendations for operational programmes concerning the adoption of a holistic impact assessment, the quality standards that Europe shall take into account and require in future interventions, as well as an innovative research agenda for the EU in this field.

T3.4 Final Public Conference in Rome (M22-M23)

Leader: Roma3 **Partners**: All partners

To validate key policy issues on the identified relevant topics relating to impact of interventions on cultural heritage in the 4 domains for strategic research agendas and guidelines for policy intervention.

Discussions with the Advisory Board members and a wider group of stakeholders identifying issues for strategic research agendas and guidelines for policy intervention in each of the three axes and four domains that the project has addressed in order to ensure holistic approach. Expected participants: 100 people.

Deliverables

D3.1 Toolkit for stakeholders (M19)

The toolkit will be made fully available on the project website.

D3.2 Report of the second workshop with stakeholders' recommendations for the policy briefs and other final deliverables (M19)

The stakeholders' comments and remarks will be applied to the final documents.

D3.3 4 policy briefs with recommendations for policy makers (M22)

4 policy briefs published on the project and EU websites and disseminated through the different channels identified.

D3.4 Guidelines for an action plan on the EU future action regarding operational programmes, a research agenda, and public policies (M24)

The guidelines will be made fully available on the project website and disseminated towards all identified end-users.

D3.5 Report of the Final Public Conference (M23)

Report of the groups and plenary discussions as regards the conclusions and recommendations contained in the policy briefs and guidelines drafted.

Work package number	4		Lead beneficiary			IA	
Work package title	Social platform configuration and coordination						
Participant number	1	2	3	4	5	6	7
Short name of participant	Roma3	IA	EMA	EDUCULT	NTUA	IADT	IRMO
Person months per participant:	8,5	18	2	2	2	2	4
Start month	1			End month		24	

Objectives

To build and reinforce the network of relations and interactions at the base of the SoPHIA social platform, which is one of the main components of the project: in a sense, it is the "backbone" of the project itself.

To allow those involved to actively participate in the project through a diverse set of activities and tools. Both the consortium partners and stakeholders will be considered as "members" of the Social Platform. From an initial core, the Social Platform will strive to achieve progressive enlargement as the project advances (two enlargement moments are foreseen).

To produce working documents that can be commented on by all the stakeholders, as well as engaging stakeholders in the various events foreseen.

Description of work:

T4.1 Building and enlarging the social platform (M1-M24)

Leader: IA. **Participants**: Roma3, EMA, EDUCULT, NTUA, IADT, IRMO.

The Social Platform will, initially, be composed of: a) the project partners; b) the stakeholders already identified and contacted before the beginning of the project. Intended as an ongoing process, the Social Platform will progressively be enlarged; it is foreseen to do this in two steps: in M6 and M13, when **two open calls** to enrol new members will be launched on the same dates through the project website and all partners' communication channels. This step will be complementary to two other occasions, the first workshop (T1.3) and the Stakeholders' Conference (T2.3), when researchers and practitioners identified as potential members will be invited to participate. These events will provide the opportunity to identify new members following a snowball methodology.

T4.2 Coordination of the Social Platform (M1-M24)
Leader: IA. **Participants:** Roma3.
The coordination of this WP will be ensured by P1 and P2. They will work with their contacts to ensure inclusion of researchers and stakeholders from regions and disciplines not covered sufficiently by the initial configuration of the stakeholders' network. However, all partners will need to devote some time to consultation and liaison between the coordinating partners (P1 and P2) and their own contacts. P2 will also fine-tune and administer the participation of user groups at the project workshops and conferences.

T4.3 Continued communications and updates to the Advisory Board and the stakeholders (M1-M24)
Leader: IA. **Participants**: Roma3.
Through the online platform, ad hoc communications (email) and the different events organized (workshops and conferences) the partners will ensure and stimulate exchanges and interactions between the different stakeholders and Advisory Board members and will ensure their contributions and inputs to relevant working documents. In due advance, P1 and P2 will contact Advisory Board members and/or stakeholders, circulate draft working documents in order to get their inputs and suggestions before the development of public events and the publication of official policy documents (WP3).

T4.4 Management of communication instruments (M1-M24)
Leader: IA. **Participants**: Roma3, EMA, EDUCULT, NTUA, IADT, IRMO.
P2 will create and manage the SoPHIA website, including the bimonthly newsletter, the distribution lists by constantly following up the project activities and outputs and creating related communication, in order to ensure that Advisory Board and stakeholders are periodically updated on the project as a whole. All partners will contribute with content and suggestions.

Deliverables:
D4.1 List of the members of the stakeholders' network and activity register (M12)
The composition of the stakeholders' network will be further developed and systematically updated on the basis of the initial document enclosed in the present application. A register of the stakeholders' network activities will be managed by P2 and included in the website (see WP5).

D4.2 Discussion paper prepared for the first public workshop and workshops proceedings (M5 and M7)
For each of the foreseen workshops a set of working documents will be prepared and shared with the stakeholders. Also the workshop proceedings will be made public on the project website.

D4.3 Discussion paper prepared for the Stakeholders Conference (M12)
As regards the Stakeholders' Conference both the working documentation (conference kit) and conference proceedings will be made public.

D4.4 Discussion paper prepared for the second public workshop (M17)
As for D4.2, also prior the development of the second public workshop to contribute to prepare participants for discussions.

Work package number	5		Lead beneficiary			IA	
Work package title	Communication and dissemination						
Participant number	1	2	3	4	5	6	7
Short name of participant	Roma3	IA	EMA	EDUCULT	NTUA	IADT	IRMO
Person months per participant:	8	12	1,5	2	2	2	4
Start month	1			End month		24	

Objectives
To design a coherent and solid visual identity for the project, its website and all its deliverables to be easily recognised by the general public, stakeholders, policy makers, etc. and to strengthen the sense of belonging to the SoPHIA community.
To contribute to the sustainability of the project, as a "renewable social platform" with a potential to go beyond the initial funding and input from the European Commission and thus increase the perceived relevance of the Social Platform for its stakeholders.
To communicate, disseminate and socialise the project outputs and deliverables within the Social Platform (partners and stakeholders) and beyond to reach a wide range of people and professionals using the projects' channels (website and online platform) and main social media platforms (Facebook, Twitter, LinkedIn, etc.)
To build bridges and improve communication between the Scientific Core Group (project partners and Advisory Board) and stakeholders.

Description of work:

T5.1 Design of the logo and the visual identity (M1-M3)

Leaders: IA. **Participants**: Roma3, EMA, EDUCULT, NTUA, IADT, IRMO.

Interarts will design the logo and font to be used in all SoPHIA external channels and publications, including the website, policy documents, and all communication materials. Templates for all the typologies of documents will be prepared and shared with all partners: internal documents, participants' lists, working documents, recommendations, research, guidelines, flyers, folders, public presentations (including .ppt templates), etc.

T5.2 Design, maintenance and management of the website (M1-M24)

Leader: IA. **Participants**: Roma3, IADT, IRMO.

The website (www.sophia.net), designed on an open source software e.g. WordPress, is intended to be the main tool of the Social Platform; in order for it make a major contribution to its success, it will be designed as a user-friendly and engaging tool. In this sense the website is understood as a lively and attractive source of information and meeting place for those interested in the work of the Social Platform and, more generally, in the research topics that SoPHIA addresses. As stated above, the website will be the basis for widespread communication both within the Social Platform (project partners and stakeholders' network) and with those outside; it will have a high profile in the field and aim to be frequently visited by a wide range of people (success will be monitored through mechanisms such a Google Analytics and a system of ADWords will be used to promote the website's positioning). The website will be used as a dialogue tool between the participants in the Social Platform and as a means of exchange between researchers and stakeholders. The website will therefore be regularly updated with relevant information to be shared: in this sense, it might be useful to foresee the preparation of a bimonthly news alert/newsletter mechanism. General information on the project as well as specific outputs such as the workshops and conference documents, policy documents, the toolkit, etc. will be regularly published on the website; it will keep track of inputs provided by users.

The website will include a restricted access section (an online platform developed on eXo open software), for project partners and stakeholders to access a private space to interact, exchange and work together on shared documents. It will also provide some real time meeting rooms and dialogue spaces on specific topics, which will be actively animated where needed, depending on the ongoing work on the working documents and policy documents. The website and restricted access section will be accessible from smartphones.

T5.3 Communication activities (M1-M24)

Leader: IA. **Participants**: Roma3, EMA, EDUCULT, NTUA, IADT, IRMO.

Communication activities will encompass: regular publication of news on the website and on the social media (Facebook, Twitter, LinkdeIn (group), YouTube and Instagram profiles will be created for the project, all interlinked), in particular related to the project ongoing activities (workshops, publication of documents, meetings, open calls for new members of the social platform, case studies analyses, etc.); 12 bimonthly newsletter with the latest achievements; flyers about the project to be distributed before and during the public workshops and conferences; a **Stakeholders' Conference in Vienna** with the Advisory Board members and the stakeholders belonging to the Social Platform thus far, and a **Final Public Conference** in Rome, with representatives of the Social Platform, as well as national and EU relevant policy makers.

T5.4 Dissemination and exploitation (M6-M24)

Leader: IA **Participants**: All partners

A complete dissemination plan drawn from the draft presented herein will be defined at the beginning of the project to reach the target stakeholders. In addition, the initial dissemination and exploitation plan will be updated by the end of the first implementation year and will be confirmed, with success and penetration rate indicators, at the end of the project. An extensive set of actions will be put in place in order to broadcast the project outcomes to a wide range of existing or potential future stakeholders, ensure the project impact and its future sustainability. It will be actively promoted by P1 and P2 through their own channels (websites, monthly newsletters covering 5 languages to over 6,000 subscribers) and those available through the project partners and the Stakeholders' Network (each has its own communication channels and a relevant number of members / participants): this system will enable to reach out to a potentially very wide community. The challenge, although, lies in the capacity to maintain both the flow of information and exchange as well as stimulate participation.

Dissemination and exploitation of the project outputs and deliverables will encompass:

- Publication of deliverables and documents produced within the project (for all those publications (documents/outputs) classified as public open access will be granted open access for all possible users through a link on the project website where the website visitors can download them);
- **Workshops and conferences** that are aimed at disseminating the project outputs, stimulating shared

reflections on the projects' topics and build a consensus on future needs in the area of impact assessment and quality standards of interventions in European cultural heritage.

- Coordination and synergies with other projects, initiatives and networks to foster cross-fertilization, enlarge the Social Platform with new members, capitalise on past and ongoing initiatives and maximise the impact and exploitation potential of the project among a variety of stakeholders. These will include educational programmes for specialised communities.
- Dissemination of some of the outputs through focused articles in top-level journals in a variety of scientific disciplines (architecture, social sciences, cultural economy, environmental sciences, etc.).

Deliverables:

D5.1 SoPHIA logo and visual identity (M3)
P2 will develop, in agreement and close cooperation with the other consortium partners, with the support of a professional designer specialized in the field of cultural cooperation a visual identity for SoPHIA. This will be done ensuring that the designer understands, and shares, the idea and objectives of the project. The task will include the design of the logo, PPT and Word templates, and flyers.

D5.2 SoPHIA website and online restricted platform completely designed, functional and accessible (M4)
The same process will be used to design the website, ensuring that the platform chosen through a benchmarking exercise is also adaptable to the ultimate needs of the project. The visual identity selected for SoPHIA will also be used for the website. The main website will be in English; private parts, needed to follow-up on on-going debates, will be eventually available in other languages.

D5.3 Communication plan (M1)
A detailed communication plan that will contain: objectives, main targets, main messages, channels, products and a calendar for external and internal communication.

D5.4 Dissemination and exploitation plan updated regularly and validated at the end of the project (M1, M12, M24).
The dissemination and exploitation plan will vary depending on different elements, such as the stakeholders progressively involved, the networks, alliances, synergies and the project partners' parallel activities that may be linked with the project. For this reason it will be revised and updated, and the final version (M24) will contain the exploitation of the project outputs and results after the end of the project, as well as a plan to maintain active the Social Platform.

D5.5 12 SoPHIA newsletters (M2-M24)
Every two months a newsletter linked to the website and made available (through a mailing list) to all stakeholders of the Social Platform and all subscribers of the website will inform about updates on SoPHIA current activities, achievements, results and publications, but also reveal the next steps within the project.

D5.6 A Stakeholders Conference (M13) and a Final Public Conference (M23)
The conference kits, media packages, and relevant publications will be made available through the website in English.

Work package number	6		Lead beneficiary			Roma3	
Work package title	Project management and scientific coordination						
Participant number	1	2	3	4	5	6	7
Short name of participant	Roma3	IA	EMA	EDUCULT	NTUA	IADT	IRMO
Person months per participant:	12,05	3	1	2,5	1	1	2
Start month	1			End month		24	

Objectives
The overall objective is to ensure scientifically rigorous, efficient and smooth running of the project.
This implies:
- ensuring high-quality coordination and delivery of the project outputs according to the proposed work plan;
- ensuring rigorous scientific quality of the task performed in WP1-3;
- maintain systematic contact (interface) with the European Commission;
- monitoring the use of personnel, time and funds, i.e. resource management;
- verifying compliance with the contractual and legal issues, i.e. contract management;
- managing effectively the risks related to the project;
- establishing effective internal and external communication procedures;

| - | managing potential ethical issues. |

Description of work

As this is a Coordination and Support Action to prepare Research Agendas and Policy Guidelines, the Scientific coordination will be done in close cooperation with the social platform organization (WP4) and with the EC. Stakeholders from EU institutions, especially, will be mobilized partly through EU channels.

Within the scientific coordination activities, the following tasks will be implemented:

T6.1. Provide guidelines for delivery of the milestones and deliverables for WP1-3, and coordinate partner contributions (M1)

Leader: Roma3 **Partners:** IA

At the very beginning of the project, the Coordinator will set the guidelines for carrying out the scientific activities and the standard procedures to coordinate partner contributions. The guidelines and the procedures will be openly discussed among the partners during the kick-off meeting, in order to ensure that all the partners agree to a shared standard for carrying out the scientific activities in WP 1-3.

T6.2. Elaboration of synthetic scientific reports to EC (M12, M24)

Leader: Roma3 **Partners:** All partners

A synthetic scientific report will be produced on the basis of the outputs of WP1-3. The draft version of the reports will be shared within the Social Platform among the SOPHIA partners and the stakeholders that will be involved in the first and second conferences in order to gain inputs from all the relevant actors.

Within the management activities, the following tasks will be implemented:

T6.3. Kick-off meeting organization and appointment of members to sit in the scientific core group (M1)

Leader: Roma3 **Partners:** All partners

During the kick-off meeting, the partners will discuss about the project work plan, division of tasks and responsibilities, they will sign the internal agreements between the leader and each partner, approve the detailed calendar and discuss on doubts and issues that may arise.

T6.4 Project monitoring and Quality Control (M1-24)

Leader: Roma3 **Partners: All partners**

The project Coordinator in strict collaboration with the Advisory Board will monitor closely the project implementation, ensuring that milestones are met, deliverables produced according to the project planning, and that agreed quality levels are achieved. In particular, constant and thorough assessment of results based on commonly agreed performance indicators will be carried out by all partners under the supervision of the Project Coordinator, so that successful execution of all work packages is ensured and the agreed quality levels are respected.

T6.5 Draft and review of the Data Management Plan (M4-M24)

Leader: IA **Partners:** All partners

In consideration of the significant amount and relevance of data generated or collected by the project (see Section 2.2) and in compliance with the requirement of the H2020 Open Research Data Pilot in which the project takes part, a Data Management Plan will be developed in its first version by M6. It will be reviewed for a final version to will be released by M9. This document will be structured alongside the model provided in the EU Commission's Guidelines on Data Management and will describe for all relevant data sets: how they will be collected, processed or generated and how they will be shared and possibly made accessible, curated and preserved.

Deliverables

D6.1 Minutes of the Kick-Off meeting (M2)

The kick-off meeting minutes will contain all topics discussed and agreements reached, as well as the work plan and calendar in annex.

D6.2 Interim scientific report to EC (M12)

The Coordinator will prepare a mid-term report to capture the progress of the project. In case of potential delays in achieving milestones a contingency plan will be prepared by the WP leaders in collaboration with the Coordinator. Each partner will be asked by the Coordinator to provide a short progress report on its activity and its advancement towards the established milestones at least every six months to be included in the interim and final monitoring reports.

D6.3 Data Management Plan (M6, M9)

The first draft will be circulated by M6, containing the list and types of data collected and generated, the purpose of data collection and generation, the origin of such data, the formats and expected size. It will also

contain the locations where the data will be stored (considering its confidential or public nature) and the possible end-users. The strategy for data management will be considered as an open process conditioned by the data development and the participant's interests in a broad sense. The project web, will be a key element to made the data accessible and to stimulate the participants' and other interested persons' (citizens') feedback.

D6.4 Final scientific report to EC (M24)

A final report will be presented at the end of the project and it will contain the process and impact evaluation of the different project aspects (objectives, partnership, coordination, activities and outcomes) and final recommendations and conclusions.

**Table 3.1 c: List of Deliverables**

Deliverable (number)	Deliverable name	Work package number	Short name of lead participant	Type	Dissemination level	Delivery date (in months)
D1.1	A concise essay mapping of existing gaps, issues and problems	1	NTUA	R	PU	M5
D1.2	Impact assessment model	1	NTUA	R	CO	M7
D1.3	A digital mapping tool in the project website with extensive filters	1	NTUA	DEC	PU	M7
D2.1	Map of best practices	2	EDUCULT	R	PU	M9
D2.2	Reports of the analysis of case studies	2	EDUCULT	R	PU	M14
D2.3	Final refined model	2	EDUCULT	R	PU	M15
D2.4	Updated list of stakeholders	2	EDUCULT	R	CO	M15
D3.1	Toolkit for stakeholders	3	IRMO	R	PU	M19
D3.2	Report of the second workshop with stakeholders' recommendations for the policy briefs and other final deliverables	3	IRMO	R	CO	M19
D3.3	4 policy briefs with recommendations for policy makers	3	IRMO	R	PU	M22
D3.4	Guidelines for an action plan on the EU future action regarding operational programmes, a research agenda, and public policies	3	IRMO	R	PU	M24
D3.5	Report of the Final Public Conference	3	IRMO	R	PU	M23
D4.1	List of the members of the stakeholders' network and activity register	4	IA	R	CO	M12
D4.2	Discussion paper prepared for the first public workshop and workshops proceedings	4	IA	R	CO	M5 and M7
D4.3	Discussion paper prepared for the Stakeholders Conference	4	IA	R	CO	M12
D4.4	Discussion paper prepared for the second public workshop	4	IA	R	CO	M17
D5.1	SoPHIA logo and visual identity	5	IA	DEC	PU	M3
D5.2	SoPHIA website and online restricted platform completely designed, functional and accessible	5	IA	DEC	PU	M4
D5.3	Communication plan	5	IA	R	CO	M1

D5.4	Dissemination and exploitation plan	5	IA	R	PU	M1, M12, M24
D5.5	12 SoPHIA newsletters	5	IA	DEC	PU	M2-M24
D6.1	Minutes of the Kick-Off meeting	6	Roma3	R	CO	M2
D6.2	Interim scientific report to EC	6	Roma3	OTHER	CO	M12
D6.3	Data Management Plan	6	Roma3	R	PU	M6
D6.4	Final scientific report to EC	6	Roma3	OTHER	CO	M24

3.2   Management structure and procedures

The management structure and procedures have been designed to fit the structure of the project, the composition of the consortium and the foreseen evolution of the stakeholders networks. These procedures will ensure the effective and efficient implementation of the work plan, as well as the successful application and dissemination of the project's outcomes. As explained in section "Organizational concept", the first and foremost management challenge of the project is **to address all the objectives of the call through a joint effort of scientific experts, practitioners and policy-makers**. The second challenge is to **ensure representation and participation of all the members of the social platform**, yet without dragging the scientific and administrative coordination into endless and/or inconclusive rounds of consultation. Therefore the management strategy aims for flat structures, rich in communication and based on consensus decisions. The general management structure is broken down into three levels (coordination, strategic, and operational) and it includes a project Coordinator, a bridging partner (P2), the Advisory Board and the Innovation Management Board, Stakeholders, as well as six work packages, and a Scientific Core Group that gathers WP leaders and leaders of specific milestones (Figure n. 8).

Figure 8 Management structure of the consortium
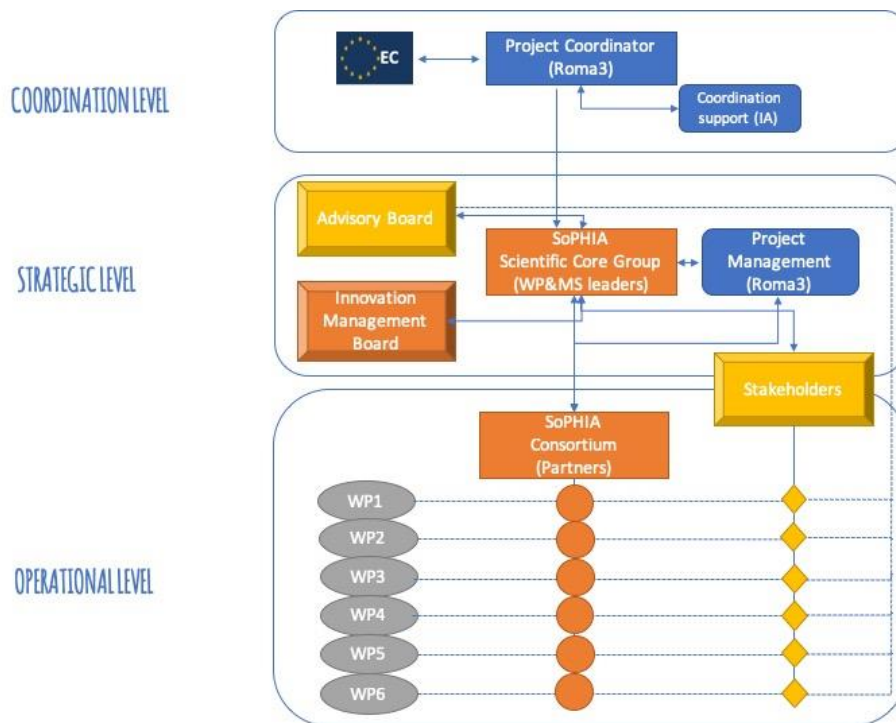
 Prof. Michela Marchiori will be the **Coordinator** of the project. She will be responsible for the overall scientific management of the project, making sure that everything gets done well and in time. In addition, she will act as liaison to the European Commission, in the submission of reports and any other matter that should come up. Furthermore, she will supervise, with the support of Interarts' (P2) coordinator, Mercedes Giovinazzo, the processes whereby networks are encouraged to participate, the dissemination strategy, the promotion of gender balance, as well as ethical issues and societal impact. A **task-based team approach** will be adopted, with work package leaders jointly working on the deliverables and milestones that incorporate the results of their work packages, cooperating and advising one another, but always under the ultimate responsibility of the Coordinator. Creative solutions and synergies will be encouraged throughout the project.

Table 3.2a: List of milestones

Milestone number	Milestone name	Related work package(s)	Due date (in month)	Means of verification
MS1	First workshop	WP1	6	List of participants, Workshop report
MS2	Impact assessment model	WP1	7	D1.2, D1.3 validated by consortium, AB, stakeholders
MS3	Map of best practices	WP2	9	D2.1 drafted and validated by consortium and AB members
MS4	Analysis of case studies	WP2	14	D2.2 drafted with relevant findings
MS5	Second workshop	WP3	19	D3.2 containing relevant suggestions by stakeholders.
MS6	Completion of WP3	WP3	23	D3.1, D3.3, D3.4, D3.5 drafted and quality validated by the whole social platform
MS7	Website/Online platform	WP5	4	D5.1, D5.2 developed and fully operative and accessible online

3.2.a How innovation management will be addressed in the management structure and work plan

An Innovation Management Board (IMB) will be set up with the responsibility of ensuring the best dissemination and exploitation for the project results, an appropriate protection of the intellectual property generated and an adequate transfer of knowledge. It will constantly monitor for innovation potentials arising at each work task, thus tackling with a multidisciplinary approach all issues related to the dissemination and exploitation of the innovation generated by the project. The Board will take care in particular of: a) the preparation of a plan on dissemination and exploitation of results (cf. D5.4) to ensure that the outcomes of the project will be valorised, protected and adequately exploited, b) the support for knowledge transfer between the project partners, c) adequate protection of the project results. The Board will be composed of a multifunctional team made of one skilled representative per partner, so as to provide a highly multidisciplinary background, and will closely cooperate with the key experts of the Advisory Board. The Board will be appointed at the Kick-off-Meeting and it will be made sure that it involves experts in the fields covered by the project. The IMB's meetings will be scheduled on an annual basis or should a special need arise. During the last months of the project the IMB might intensify the frequency of its meetings, via virtual facilities, in order to maximise the exploitation opportunities of the project.

3.2.b. Critical risk for implementation

Table 3.2b: Critical risks for implementation

Description of risk (indicate level of likelihood: Low/Medium/High)	Work package(s) involved	Proposed risk-mitigation measures
Lack of commitment by some stakeholders that undermines both in-depth debate and the expected results in terms of a holistic assessment model (M)	WP1, WP2, WP3, WP4, WP5	Each partner will activate its network relations to substitute the missing stakeholders. In detail each partner of the consortium has prepared a list of possible substitutes in order to cover all the domains.
Difficulties in obtaining the access to the field to test the model (M)	WP2	The consortium will leverage the social platform in order to find out possible solutions and identify alternative case studies. In addition, the consortium will leverage on its wide network of contacts in the field to ensure access to at least 6 case studies.
Loss of key member(s) of co-ordination team (L)	WP6	The proposed coordination team includes a number of experienced research leaders providing the robustness to absorb the loss of team members.
Loss, or failure to deliver, of a partner in the core network (L)	WP1, WP2, WP3, WP6	The extensive network of experienced partners would minimise the impact of failure in relation to network member, while loss of knowledge in relation to specific existential fields can be replaced. A Consortium Agreement (CA), will define the procedures to include a new partner, if needed. The CA is envisaged as an instrument to develop and supplement

		aspects that are specific to the project and that are not fully covered in the GA, in particular issues related to the future exploitation and dissemination of results, responsabilities of the parties, liability, governance structure and financial provisions. Even though the CA has the characteristic of regulating internal issues between project partners, it nevertheless finds its boundaries in the GA, not being allowed to contradict or negate the provisions therein provided.
Financial overspend on the work programme (L)	WP6	A variety of methods of data collection and analysis, and of consultation of users/ stakeholders is planned, which will provide the flexibility to adapt working methods to financial constraints – for example substitution of conference events with face-to-face/Skype interviews. The Consortium Agreement will also regulate the financial issues within the consortium.
Timetable slippage	WP6	The range of experienced partners and the range of methods of analysis and consultation will provide a robust framework to complete the work programme as per timetable

3.3 Consortium as a whole

The project coordinator is Michela Marchiori is currently Full Professor of Organizational Design and Human Resource Management in Roma Tre University. Since 2016 she is member of the project "Cultural Heritage and Contemporary Culture: Transferring knowledge, Managing Outcomes, and Enabling Sustainability" founded in collaboration between Corporate Governance Lab. (Rome Tre University) and Institut für Organisation und Lernen (Innsbruck University). Roma Tre University, who has gained a significant reputation in the academic world thanks to the University has involved, either as coordinator or as partner, in around 80 International Research projects. The coordinator partner team includes Mauro Baioni PhD in Urban policies, team member of the councillor for urban regeneration of Rome. Giovanni Caudo is professor in urban planning, he implemented the Urban Regeneration Strategy of the city and promoted grant applications for the European Framework Programmes and Horizon 2020. Annalisa Cicerchia is an expert in cultural economics, cultural policy strategic planning, and evaluation. Since 2011 she is Senior Researcher at the Italian National Statistical Institute. Paola Demartini is the head of the Corporate Governance Lab, which includes a special section on the Governance of Cultural Heritage and Contemporary Culture. Lucia Marchegiani is Associate Professor of Business Organization and Human Resources Management. She has been Chair of the "International Conference on Sustainable Cultural Heritage Management".

Together with the coordinator another 2 academic partners plus 4 professional partners, leaders in the fields of cultural advocacy, research and international relations, cultural heritage and cultural management in Europe complete this project consortium. Altogether, the team brings together a plural group of social and cultural scientists and experts from diverse European regions (south, north, central, eastern) with a long public and academic career. They belong to a number of interdisciplinary prestigious institutions and have extensive of experience in participating and leading European research projects (see Section 4). As the following Table *3.3.a* shows their specialities as cultural, economic, social, or media experts cover a large range of perspectives on the topic of cultural heritage, cultural management (including interventions of different typologies) and cultural policies. In addition, Interarts has experience in setting up and managing social platforms in the cultural sector (see in Section 4 the projects CulturalBase and NETCHER) and networks of cultural experts and scholars for research purposes (see EENC) and IRMO has extensive experience in digital culture and digitalization.

3.3a. List of partners

Table 3.3a. List of partners

Institution	Name	Discipline, Area of Expertise	Country
1. Roma Tre University	Professor Michela Marchiori (**Coordinator**)	Organizational Design and Human Resource Management, Cultural Heritage and Contemporary Culture	Italy
	PhD. Mauro Baioni	Urban policies, Urban Planning, Public Consultant.	
	Professor Giovanni Caudo	Urban Studies, Urban Planning, Regional Policies and Local Planning	

Institution	Name	Discipline, Area of Expertise	Country
	Annalisa Cicerchia	Cultural Economics, Cultural Policy, Strategic Planning, Cultural Heritage.	
	Professor Paola Demartini	Business Studies, Cultural Heritage, Contemporary Culture	
	Professor Lucia Marchegiani	Business Organization, Creative and Cultural Industries, Sustainable Cultural Heritage Management	
2. Interarts	Mercedes Giovinazzo	Arts Management, of Culture and Cultural and Natural Heritage, Cultural Projects Management	Spain
	Dr. Antonio Gucciardo	Cultural Management, Cultural Tourism, Economic Impact	
3. European Museum Academy	Henrik Zipsane	Museum and Heritage Organization, Culture and Adult Education	Netherlands
	Elia Vlachou	Museology, Cultural Management Consultant	
	Dr. Emek Yilmaz	Museum Organisations, Sociology, Cultural Heritage	
4. EDUCULT	Dr. Angela Wieser	Research, Evaluation and Consultancy, Cultural Policy and Management, Arts and Cultural Education	Austria
	Dr. Aron Weigl	Research, Cultural Policy Consultancy, Arts Education, Cultural Participation, Cultural Development	
	Veronika Ehm	Research and consulting in cultural policy, educational policy, arts education	
5. National Technical University of Athens	Dr. Nicholas Anastasopoulos	Sustainability, Environmental Management, Participation, Urban Complexity	Greece
	Hariklia Hari	Territorial Networks, Cultural Management, Design Strategies	
6. Institute of Art Design and Technology	Paraic Mc Quaid	Visual Cultures, History of Art, Cultural Policy, Cultural & Creative Industries, Arts Administration	Ireland
	Dr. Kelly Davidson	Humanities and Arts Management, Political Economy, Heritage Tourism, Cultural Policy, Public Cultures	
7. IRMO	Dr. Sanja Tišma	Sustainable Development, Public Policies and Strategic Planning, Enviroment.	Croatia
	Dr. Aleksandra Uzelac	Changing Environment, Digital Culture, Cultural Policies, Cultural Diversit	
	Dr. Daniela Angelina Jelinčić	Cultural Heritage Management, Cultural Tourism, Cultural/Creative Industries, Cultural Policy.	
	Barbara Lovrinić	Museology and Heritage Management, Cultural and Media Management	

The internal organization of the consortium will maintain a close contact between the Coordinator and all the partners. Professor Michela Marchiori and the coordinating team are responsible for the coordination work in each of the articulated axes of the project. They will set up the scientific coordination of the project and the coordination of non-scientific management (see WP6).

3.3.b. Advisory Board

The consortium team will be complemented by an international *Advisory Board* of renowned experts who will provide guidance, recommendations and feedback on the progress of the project. Members of the *Advisory Board* will also provide specific input and advice as appropriate to their expertise across all WPs. All of them are leading experts in their different fields (see biographies in Section 4). They complement the consortium in terms of disciplinary expertise to define the strategic orientation of the project, as well as in providing inputs for carrying out the tasks foreseen in the scientific WPs, as they belong to **different types of organizations**, namely: Educational Sector, Policy Makers in Governance European level, Research and Cultural Centres, and also in the Cultural and Creative Service.

The *Advisory Board* also has **experience in the following fields:** cultural heritage and environment; cultural politics and cultural management; international projects cooperation and urban planning development; consultant/advisors and researchers in the cultural scope; and on issues related to culture, tourism and education.

The following experts have confirmed their participation in the Advisory Board. Their letters of intent may be provided upon request.

Table 3.3b. List of confirmed Advisory Board members

Name	Institution	Discipline, Area of Expertise	Country
1. Pat Cooke	University College Dublin	Cultural Policy and Arts Management, Heritage Council's Museum Standards	Ireland
2. Carla Di Francesco	Fondazione Scuola dei Beni e delle Attività Culturali - Scuola di Patrimonio	Cultural and Landscape Heritage, Conservation and Restoration of Architectural Artifacts	Italy
3. Evinc Dogan	Akdeniz University	Management and Development of Cultural Heritage, Tourism Management	Turkey
4. Federica Galloni	MIBAC - Ministero dei Beni Culturali / Direzione Generale Arte e Architettura Contemporanee e Periferie Urbane	Contemporary Art, Urban Suburbs Planning, Architectural Heritage and Landscape Transformation	Italy
5. Beatriz García	University of Liverpool - Institute of Cultural Capital and Senior Research Fellow in Communication Studies	ECOCs Member, Culture-Led Urban Regeneration, City Strategists, Communication Policy, Cultural Policy Research	United Kingdom
6. Rob Mark	PASCAL Observatory - Learning Cities Network	Environmental Studies, Town Planning, Heritage and Culture Education and Research	United Kingdom
7. Christine Merkel	German Commission for UNESCO	Cultural Heritage, International Relations, Strategy Development and Public Policies in Arts, Media and Culture	Germany
8. Kathrin Merkle	Council of Europe	Culture and Cultural Heritage and Landscape, Democratic Participation, European Cooperation	France
9. Valya Stergioti	Interpret Europe	Non-formal Education and Adult Training, Heritage Environment and Interpretation, Heritage Management.	Germany

3.3.c. Academics, Practitioners and Policy Stakeholders

These *Stakeholders* that we have approached and recruited so far represent a large range of disciplines and perspectives on the array of themes covered by this project. They include influential policy makers, economists and managers, scholars, researches and consultants in cultural, heritage, urban planning and regeneration fields, as well as specialists in interdisciplinary fields such as cultural studies, cultural policy and cultural heritage. All of them are experienced scholars and some have strong links with the cultural sector and cultural administration in different ways (see biographies in Section 4). The list will be enlarged with other specialists in the course of the project.

In this context, given the wide variety of actors, we have applied some analytical categories as guiding principles to select the leading networks and participants in the social platform; they are not closed compartments and grey areas exist among them:

• *Academics* belonging to relevant disciplines for the topic at hand - sociologists, political scientists, anthropologists, historians - and specialists in crucial interdisciplinary fields such as art studies, arts management, cultural studies, architecture and economics.

• *Administrators and managers of heritage sites and training institutions in the cultural sector* (museums, auditoriums, institutions of higher education, etc.).

• *Cultural consultants and representatives of local, national and European cultural administrations*, as well as EU, CoE and UNESCO.

• *Representatives of particularly relevant civic and professional associations* related to heritage, the professional sector of culture, or the defence of cultural identities and intercultural dialogue.

In detail, *Stakeholders* belong to the following **sectors and types of institutions:** Educational, Policy Makers in Governance European level organizations, Research and Cultural Centres, Cultural and Creative Service Firms, Cultural Heritage International Institutions and Organizations, Cultural Heritage Sites, and No-profit Cultural Heritage Funding/Supporting Centres.

In addition, *Stakeholders* have **experience in the following fields:** cultural heritage, environment and museology; cultural politics, cultural economics and cultural management; cultural digitalization and cultural communication and social media; international projects cooperation and urban planning development, consultant/advisors and researchers/professors in the cultural scope; and cultural tourism and arts management.

Partner 2 (Interarts), a leading partner in the field of cultural advocacy in Europe, will be the partner coordinating the Stakeholder Network. After an initial effort to map the initial Stakeholder Network, the consortium will make two additional rounds of inclusion of new Stakeholders at two key moments of the project. Aware of the complexity of mobilizing from the beginning all actors, we have concentrated on having the confirmation of participation of leading actors (mostly networks) that have agreed to participate and act as **multipliers within their respective networks**. In this light, **two "calls for enlargement" will be done,** the first one at the beginning of the project and the second one right before the Stakeholders Conference. So far, 25 stakeholders from 13 countries have joined the project as stakeholders. Letters of intent may be provided upon request.

Table 3.3c. List of Academics, Practitioners and Policy Stakeholders

Name	Institution	Country
1. Aira Andriksone	Latvian Association of Castles, Palaces and Manors	Latvia
2. Matteo Bagnasco	Fondazione San Paolo	Italy
3. Giovanna Barni	Coopculture	Italy
4. Inês Bettencourt de Câmara	Mapa das Ideias	Portugal
5. Marco Biscione	Museo M9	Italy
6. Luca Borzani	La Città - on line - Journal of Civil Society	Italy
7. Marco Causi	Associazione per L'Economia della Cultura	Italy
8. Ulrike Dittrich	Hambach Castle Foundation	Germany
9. Cornelia Dümcke	Culture Concepts	Germany
10. Dorota Ilczuk	Warsaw School of Social Sciences and Humanities	Poland
11. Hanna Lämsä	The Association of Cultural Heritage Education in Finland	Finland
12. Alessandro Leon	Center For Research And Studies On Labor Problems, Economy And Development (CLES)	Italy
13. Florian Meixner	Austrian Commission for UNESCO	Austria
14. Gráinne Millar	GM Innovations	Ireland
15. Marcello Minuti	Scuola di Patrimonio - Fondazione Scuola dei Beni e delle Attività Culturali	Italy
16. Simona Neumann	Timişoara 2021 – European Capital of Culture	Romania
17. Maria Philippi	Eleusis - European Capital of Culture 2021	Greece
18. Marta Ragozzino	Polo Museale of Basilicata - MIBAC	Italy
19. Dragana Lucija Ratković	Muze d.o.o. / Muses Ltd	Croatia
20. Peter Robbins	Dublin City University Business School	Ireland
21. Giovanni Schiuma	Arts for Business Institute	UK/Italy
22. Hanna Szemző	Metropolitan Research Institute - MRI	Hungary
23. Carlo Maria Travaglini	European Association For Urban History (EAUH)	Italy
24. Aida Vežić	Balkan Museum Network	Sweden
25. Emina Višnić	Rijeka 2020 - European Capital of Culture	Croatia

3.4   Resources to be committed

The primary costs for the project are personal costs. These costs include the dedication of participants (Project coordinator and Partners) to the project as well as the research assistantship hiring costs. Differences between partners in this respect are mainly due to the special responsibilities that some of them have regarding the substantive work to be done on management of the project (P1), overall management of the social platform (P2), and responsibilities related to leading a WP (P, a specific task, or organizing a gathering event.

Table 3.4a Summary of staff effort

	WP1	WP2	WP3	WP4	WP5	WP6	Total Person-Months per Participant
P1 Roma3	3,75	5,75	6,95	8,5	8	12,05	45
P2 IA	2	1	0,5	18	12	3	36,5
P3 EMA	2,5	6	3	2	1,5	1	16
P4 EDUCULT	2,5	8	3	2	2	2,5	20
P5 NTUA	10	6	3	2	2	1	24
P6 IADT	3	6	3	2	2	1	17
P7 IRMO	6	7	12	4	4	2	35
Total Person Months	29,75	39,75	31,45	38,5	31,5	22,55	193,50

Table 3.4 b 'Other direct cost' items (travel, equipment, infrastructure, goods and services, large research infrastructure)

1 – Roma3	Cost (€)	Justification
Travel	41.044,00	Kick-off meeting; travel for case studies; travel of Roma 3 staff for 2 workshops and 1 stakeholder conference; travel for 50 invited people to attend to the Final Public Conference.
Equipment	0,00	
Other goods and services	4.500,00	Open Access to publications; Organization of Final Public Conference (100 people)
Total	**45.544,00**	

2 – IA	Cost (€)	Justification
Travel	5.160,00	Consortium meetings (kick-off); workshops and conferences
Equipment	0,00	
Other goods and services	20.900,00	eXo platform mantenance and features for at least 100 users; dissemination materials (flyers etc); multimedia production of 1 video
Total	**26.060,00**	

3 – EMA	Cost (€)	Justification
Travel	15.296,00	Travel for kick-off meeting, 2 workshops; 2 conferences; case studies.
Equipment	0,00	
Other goods and services	0,00	
Total	**15.296,00**	

4 – EDUCULT	Cost (€)	Justification
Travel	8.400,00	Consortium meetings (kick-off); workshops and conferences; meetings for case studies.
Equipment	0,00	
Other goods and	20.000,00	Organization of stakeholder conference (rental of venue for 2

		days, catering, travel and accommodation for 40 people).
Total	**28.400,00**	

5 – NTUA	**Cost (€)**	**Justification**
Travel	5.560,00	Consortium meetings (kick-off); workshops and conferences; meetings for case studies.
Equipment	0,00	
Other goods and services	23.780,00	Open Access to publications; Organization of first workshop (rental of venue for 2 days, catering, travel and accommodation for 30 people). Dissemination materials (flyers etc).
Total	**29.340,00**	

6 – IADT	**Cost (€)**	**Justification**
Travel	12.496,00	Consortium meetings (kick-off); workshops and conferences; meetings for case studies.
Equipment	2.000,00	Rental of equipment for workshop
Other goods and services	21.620,00	Consumables; Open Access to publications; Organization of second workshop (rental of venue for 2 days, catering, travel and accommodation for 30 people).; Dissemination materials (flyers etc); multimedia production (video etc)
Total	**36.116,00**	

7 – IRMO	**Cost (€)**	**Justification**
Travel	16.000,00	Consortium meetings (kick-off); workshops and conferences
Equipment	2.000,00	Rental of laptops and computers for researchers
Other goods and services	4.000,00	Open Access to publications; Dissemination materials (flyers etc).
Total	**22.000,00**	

COVER PAGE

SoPHIA – SOCIAL PLATFORM FOR HOLISTIC HERITAGE IMPACT ASSESSMENT

SECTIONS 4-5

Call: **H2020-2018-2020**
Topic: **TRANSFORMATIONS-16-2019**
Type of action: **CSA**
Proposal number: **SEP-210580478**
Proposal acronym: **SoPHIA**
Coordinator: **Michela Marchiori, Universita Degli Studi Roma Tre**

List of participants

Participant No. *	Participant organisation name	Country
1	Universita Degli Studi Roma Tre - Roma3	ITALY
2	Fundació Interarts per a la cooperació cultural internacional - Interarts	SPAIN
3	Stichting European Museum Academy - EMA	NETHERLANDS
4	EDUCULT - Denken und Handeln in Kultur Und Bildung	AUSTRIA
5	National Technical University of Athens - NTUA	GREECE
6	Dun Laoghaire Institute of Art Design and Technology - IADT	IRELAND
7	Institut za Razvoj i Medunarodne Odnose - IRMO	CROATIA

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Section 4: Members of the consortium

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4.1. Participants (applicants)

4.1.a. Partners

1. Roma Tre University, Italy
Website: www.uniroma3.it/

Established in 1991, Roma Tre University has gained a significant reputation in the academic world thanks to its quality teaching and research programme. Roma Tre is involved, either as coordinator or as partner, in around 80 International Research projects. Currently, Roma Tre is involved in the following projects related to Cultural Heritage: Digital Innovation in Cultural and Heritage Education in the Light of 21st Century Learning (Project Reference: 2015-1-NL01-KA201-009021); Open Heritage: Organizing, promoting and enabling heritage re-use through inclusion, technology, access, governance and empowerment (Grant Agreement ID: 776766).

Michela Marchiori (Female) is currently Full Professor of Organizational Design and Human Resource Management at the Department of Business Studies in Roma Tre University. Since 2016 she is member of the project "Cultural Heritage and Contemporary Culture: Transferring knowledge, Managing Outcomes, and Enabling Sustainability" founded in collaboration between Corporate Governance Lab. (Rome Tre University) and Institut für Organisation und Lernen (Innsbruck University). She is the current director of the post-graduate, lifelong learning "Master in management, promotion, technological innovations in cultural heritage" at the Department of Business Studies and Vice-director of the two years long post-graduate, lifelong learning "Master in Culture Heritage" co-designed by the Department of Business Studies and the Department of Architecture.

Mauro Baioni (Male) is PhD in Urban Policies. Since 1997, Urban Planner, Public Consultant and Member of City Planning Offices for several local Administrations in Italy. From 2013 to 2015, team Member of the Councilor for Urban Regeneration of Rome, with specific responsibilities in setting up and coordination of Urban Regeneration Programs and reuse of decommissioned public assets. His main research fields concern Urban Policies for Public Space Enhancement and the Evaluation of Planning Impacts. Team Member in International Programs (Interreg BVM Bassins versants mediterranéens, Urbact TUTUR - Temporary use as a tool for Urban Regeneration, Interreg IV CLUE - Climate Neutral Urban Districts). Partner of European in Funding the Cooperative City - New Economic Model for Community-led Urban Development (2016).

Giovanni Caudo (Male) is Professor in Urban Planning at Roma Tre University of Rome, Department of Architecture, where he teaches at the Urban Planning Laboratory, Bachelor Degree in Architecture and Urban Studies. Between 2003 and 2011 he coordinated (and taught at) the PhD in Regional Policies and Local Planning at the ex-department of Urban Studies offered by the same university. His current studies focus on housing and broadly on the experience of inhabiting the city. In this respect, he gained specific skills, developing national and international research: Housing Italy, Italian Pavilion at 11th Venice Architecture Biennale 2008; An exploration of the housing question, Roman Economy Report 2005-2006; Inclusionary housing: a comparative international analysis, commissioned by the Lincoln Institute of Land Policy, Cambridge (MA). Currently he is the coordinator of Roma Tre team involved in H2020 Open Heritage project.

Annalisa Cicerchia (Female) is an expert in Cultural Economics, Cultural Policy Strategic Planning, and Evaluation. Since 2011 is Senior Researcher at the Italian National Statistical Institute, since 1995 full researcher at the National Institute for Economic Planning, then National Institute of Economic Analysis, she is currently Professor of Management of the creative enterprises at the University of Roma Tor Vergata, where she teaches since 1999. Her research areas concern Cultural Economics, Cultural Indicators, Social Impact of Culture, Culture and Well-being, Cultural Participation, Cultural and Creative Economy and Enterprises, Cultural Sustainability, Cultural Heritage, Museums. She is the author of books and articles on these topics.

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Paola Demartini (Female) is Full Professor of Managerial and Financial Accounting at Roma Tre University, Department of Business Studies. She is the Head of the Corporate Governance Lab, which includes a special section on the Governance of Cultural Heritage and Contemporary Culture. Since 2000, she is member of the supervisory committee of PhD courses on Financial Accounting and Governance disciplines, where she taught, among others, Performance Management and Business Evaluations. Since 2016 she is coordinator of the project "Cultural Heritage and Contemporary Culture: Transferring knowledge, Managing Outcomes, and Enabling Sustainability, a collaboration between Corporate Governance Lab. (Rome Tre University) and Institut für Organisation und Lernen (Innsbruck University).

Lucia Marchegiani (Female) is Associate Professor of Business Organization and Human Resources Management at Roma Tre University, where she teaches Human Resources Management and Knowledge Management. Her research interests cover topics such as Creative and Cultural Industries, Innovations and Organizations, Experimental Organizational Behavior, Knowledge Management and Social Media, Participatory approaches in Culture. She has been Chair of the "International Conference on Sustainable Cultural Heritage Management", (Department of Business Studies, Roma Tre University, 11-13 October 2013).

- *Relevant publications/products*

Caudo, G., (2015). Roma Prossima, in: Ciorra, P., Garofalo, F. and Rossi, P. O. *Roma 20-25 Nuovi cicli di vita della metropolis*, New life cicle for the metropolis, p. 18-31. *Quodlibet*, ISBN: 9788874628032.

Cicerchia, A. (2018). Cultural heritage and landscape as determinants of well-being, in *Economia della Cultura* 4/2018, pp.451-464, DOI: 10.1446/92241

Cicerchia, A. (1999). Measures of optimal centrality: Indicators of city effect and urban overloading. *Social Indicators Research*, 46(3), pp.273-299.

Demartini, P., Marchiori, M. and Marchegiani, L., (2018). Citizen Engagement as a Criterion to Select the European Capital of Culture: a Critical Appraisal. Proceedings IFKAD 2018, Delft, Netherlands 4 - 6 July 2018, ISBN 978-88-96687-11-6. ISSN 2280787X.

Piber, M., Demartini, P. and Biondi, L., (2018). The management of participatory cultural initiatives: learning from the discourse on intellectual capital. *Journal of Management and Governance*, pp.1-24.

- *Relevant projects*

1) "**Open Heritage** - Organizing, Promoting and Enabling Heritage Re-use through Inclusion, Technology, Access, Governance and Empowerment", 4-year research and innovative action, starting in June 2018 and funded by the European Union's H2020 programme (with 14 EU partners, including **Roma Tre University**), 2018 – ongoing. Grant Agreement number: 776766 –OpenHeritage –H2020-SC5-2017-OneStageB. The project OpenHeritage aims at creating, testing and optimizing an inclusive governance model of adaptive heritage re-use and an interdisciplinary toolbox which will be tested in six diverse Cooperative Heritage Labs (CHLs) to produce usable and transferable results. The main idea behind the project is that abandoned or underused buildings, areas, represent also important instruments and opportunities to increase social cohesion, introduce innovative bottom-up economic activities and create employment opportunities. An important goal of the project is the development of innovative financial tools in order to develop alternatives and to enable local communities and their actions to be economically sustainable.

2) The research and training programme **New Approaches in the Conservation of Contemporary Art** (**NACCA**), MSCA-ITN Call 2014, from 1/06/2015 to 31/05/2019, (Coord. Maastricht University, with 19 partners in Nederland, Great Bretain, Portugal, Germany, Italy (**Roma Tre University**), Poland, USA, Denmark, Spain) aims to educate a new generation of professional curators, conservators and academic researchers who are properly equipped to face the challenges of the preservation of modern and contemporary art. NACCA will address questions concerning the identity, values and authenticity of modern and contemporary artworks and the consequences for their conservation, rethinking historically grown professional distinctions as those between the curator and the conservator, re-organizing the institutional ecosystem, and establishing frameworks for international, interdisciplinary and intersectoral

research and training collaboration. The programme is designed by experts working in museums, heritage organisations and universities that have a profound experience in the field of contemporary art conservation and conservation research. It consists of a research and a training part, which are closely connected and mutually inform each other. It will focus on the development of a reflective professional attitude, which is a pre-requisite in the increasingly complex and collaborative field of contemporary art conservation.

3) **Investigating cultural sustainability,** Cost Action IS1007, duration 2011-2015, aimed at highlight European research across its members' countries in order to provide policy makers with instruments for integrating culture as a key element of the sustainable development. Action Investigating Cultural Sustainability in its four years organised eight workshops or symposiums hosted by its members across Europe, and a cross-cutting meeting was organised in Brussels for stakeholders in order to collate and produce new knowledge with the help of external experts, scholars, policy-makers and practitioners.

4) **Strengthen cultural operators'capacity**, Culture Action Europe, duration 2015-2017. Activity 3.1: Measuring the impact of the arts in society in Europe: culture and well-being" included in the Specific Agreement Number 2015-0949/001-001 CRE SUPNET with the Education, Audiovisual and Culture Executive Agency, the European Commission.

5) **NetMUSE, International Networks valorization for Museums (Scientific Coordinator)** funded by the Italian Ministry of Research and Education (2012-2014). The NetMUSE project deals with the analysis of the organizational and managerial models for the valorization of international networks and customer satisfaction related to Museums and Cultural Heritage Organizations.The NetMUSE project involves the following international Research Institutions: University Roma Tre, Italy (scientific coordinator); Aahrus University, Denmark; Yasar University, Turkey; St. Petersburg State University of Economics, Russia; University Roma La Sapienza, Italy.

2. Interarts, Spain
Website: www.interarts.net

Founded in 1995 in Barcelona, Interarts is a not-for-profit Independent Organization set up to promote Human Development through Culture. Its mission is to foster the role of culture both from a theoretical perspective – through research, strategy design and knowledge transfer – as well as from a concrete and practical approach: through local and international cooperation, project coordination and management. Interarts can make unique contributions on Cultural Rights, Cultural Diversity, Intercultural Dialogue, the Creative Industries and on Innovation fields such as the role of culture in local development policies, and the economic impact of the cultural and creative sectors.

Mercedes Giovinazzo (Female) is Director of Interarts since 2005. She holds a degree (Laurea) in Archaeology from the Università degli Studi "La Sapienza", Rome, Italy and a Master's Degree in Arts Management from the École Supérieure de Commerce de Dijon, France. Previously, she has been Director of Services and Deputy Director of Customer Services at the Universal Forum of Cultures – Barcelona 2004, S.A. holding responsibilities in planning, contracting and management of general services and customer services; Administrator at the Division of Culture and Cultural and Natural Heritage, DG IV, at the Council of Europe, intergovernmental organization with 47 member States and its headquarters in Strasbourg, France, with responsibilities for the coordination and management of international cultural cooperation projects.

Antonio Gucciardo (Male) is General Manager of Interarts since 2006. He holds a Doctorate in Tourism Sciences from the Faculty of Economics of the Università di Palermo, Italy, with a specialization in the Economy of Culture and Cultural Marketing as well as in quantitative and qualitative research. He is Member of the Commission for the Adaptation to the European Space for Higher Education of the "European Master of Professional specialization, Inter-Mediterranean Mediation: Economic inversion and intercultural integration" (MIM) of the Universidad Autónoma de Barcelona, Spain Currently, and on behalf of the project consortium, he is Director of the European Union Culture for All - Phase III project for the promotion, development and internationalization of the cultural sector in Kosovo. Currently, he is Board Member and Treasurer of Culture Action Europe.

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- *Relevant publications/products*

Giovinazzo, M., "The impact of culture", in Economia della cultura, Anno XXIV, 2014 / n. 2.

Giovinazzo, M., Gucciardo, A., "Análisis y diagnóstico cultural / territorial", in MANUAL ATALAYA de apoyo a la gestión cultural, 2014 cap. 4.4. http://atalayagestioncultural.es/capitulo/analisis-diagnostico-cultural-territorial.

Council of Europe, "Digital Culture in Europe: A Selective Inventory of Centres of Innovation in the Arts ant New Technologies", Council of Europe Publishing, 1999.

Giovinazzo, M., Gucciardo, A., "Strategic Management in the Arts", Routledge, 2013, pp. 73-79.

Gucciardo, A. Barcelona 2005-2007, Interreg IIIC and the European Found for Regional Development (FEDER), "Σ3C Culture, Competitiveness and Creativity - Strategies for the Promotion of Competitiveness and Creativity in the Cultural Industries", Interarts.

- *Relevant projects*

1) [NETwork and digital platform for Cultural Heritage Enhancing and RebuildingNETCHER – H2020]() – Partner/Responsible for managing online platform and communication –it is a project funded by the 8th Framework Programme of the European Union for Research and Innovation – Horizon 2020.NETCHER seeks to address the complex challenge of harmonizing and bringing together these worthy, but often disconnected initiatives through a participative approach that will result in the setting-up of a structured network (Collaborative Platform) drawing together a broad range of players such as international and umbrella organizations, national authorities and public policy makers, researchers, NGOs as well as public and private organizations. As a collaborative platform, NETCHER proposes a participative model for the process of research exploring, formulation and implementation of relevant policies and practices in Europe to serve these ends.

2) *The Public Value of Culture for Social Cohesion and Urban Development in Africa – Culture at Work Africa (2018-2021) – DEVCO* – Leader - The project is led by Interarts and partnered by Arterial Network, BOZAR, Culture et Développement, CERAV Afrique, Culture Fund of Zimbabwe Trust, UCLG, International Music Council, which joined forces to create new opportunities and mobilise stakeholders to **promote intercultural dialogue and cultural diversity in urban and peri-urban areas** in Africa as drivers for **social inclusion and sustainable human development**. It aims to support projects to develop **safe and neutral spaces in urban contexts for intercultural dialogue**; strengthen **multi-stakeholders national and transnational cooperation**, capacity building and networking opportunities; and promote **citizenship and intercommunity relations** in 15 African countries. It will support, monitor and evaluate up to 35 projects and provide capacity building and networking opportunities to the organizations involved.

3) CulturalBase. Social Platform of European Identities and Cultural Heritage (2015-2017) – H2020 – Partner - The project was launched in 2015 in the framework of the European Union Horizon 2020 Research and Innovation Programme. CulturalBase aimed to contribute to the development of a common approach on key issues related to cultural heritage and European identities through academic research and a shared process of structured content production in the three main areas related to the main challenges for and strengths of culture in Europe: cultural memory, cultural inclusion and cultural creativity. To develop the shared content, CulturalBase has developed an **online platform** linked to the project website with restricted access only for stakeholders. The documents that have periodically been produced as well as other news are primarily disseminated on the website and a Facebook page with 440 followers. In 2017 several documents have been disseminated through the CulturalBase information channels.

4) Brokering Migrants' Cultural Participation (2013-2015) – DG JUSTICE – Leader – The project aimed to enhance and stimulate the cultural participation of migrants by improving the capacity of their local cultural public institutions to interact with them. Public Cultural Institutions are part of receiving society, which has to live up to the challenge of managing cultural diversity and ensuring intercultural integration. Central to these tasks is the enhancement of the intercultural capacity of public cultural institutions by diversifying their staff and governance bodies. In a more specific way, the project objectives are: - To

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promote the engagement of the receiving communities in interacting with the migrants, based on the mutual respect of their rights, obligations and different cultures; - To ensure equal treatment and improve diversity management in the public and private work places, service provision, education systems, media and other important arenas.

5) <u>European Expert Network on Culture (EENC)</u> (2010-2015), DGEAC – Leader - On behalf of the Directorate General for Education and Culture of the European Union (DG EAC), Interarts and Culture Action Europe coordinate the European Expert Network on Culture. Through a group of 18 experts, the network provides advice and support to the European Commission in the development of relevant and crucial issues related to cultural policies, through the analysis of cultural policies at European, national and regional levels and the preparation of reports, studies and other policy-oriented tools. The project involves the collaboration of the Institute of International Relations, Zagreb (IMO), Croatia, and focuses on different dimensions of culture, as well as on its relation with other areas such as social aspects, economy, external affairs, regional development, innovation policy, environment, tourism, research, etc. Although activities are mainly developed at EU institutional context, the EENC also works at national, regional and local levels, both in Europe and other regions, whenever that may be of interest to the European Commission. Start date 20 December 2010. Objectives: To contribute to improve policy-making in Europe through the creation and coordination of a European Expert Network in the field of culture which provides advice and support to the European Commission in the analysis of cultural policies and its implementation at national, regional and European level.

3. European Museum Academy (EMA), Netherlands
Website: www.europeanmuseumacademy.eu

EMA is a non-profit Foundation established to reflect Museums at the International Level, to promote Research on Museography and Museology as a high cultural activity. It collaborates with IULM University in developing a Master Course in Museology (in class&online), it is Partner in the International Summer School of Museology of Piran and in the Nordic Centre of Heritage Learning in Östersund. EMA is active in the sector of multimedia creativity with "Museums in Short" contest and "Heritage in Motion", the latest run in cooperation with Europa Nostra and EUROPEANA.

Henrik Zipsane (Male) has been CEO of the Jamtli Foundation (a museum and heritage organization in central Sweden 2001-2019 and Senior Researcher at The Nordic Centre of Heritage Learning & Creativity since 2005—R&D organization for learning through Heritage Engagement, and the Director of the European Museum Academy since January 2019. He holds a Master's degree in History from University of Copenhagen and a PhD degree in Education and History from The Danish University of Education. Henrik Zipsane is Guest Professor in Heritage Learning and Regional Development at Linköping University since 2010 and Associate of Pascal Observatory since 2007 as well as Associate of European Expert Network on Culture and was appointed Expert on Culture and Adult Education 2011 by the European Commission.

Elia Vlachou (Female) is Museologist and Cultural Management Consultant, Co-founder and Gal Secretary of the Hellenic Steam Institute, a nonprofit association dedicated to the Preservation and Valorization of Industrial Heritage. From 2003 to 2017 she worked at the Piraeus Cultural Foundation. Head of the Museums Department since 2007, she has coordinated the Department's E.U.-financed projects and the Museum Network's numerous temporary exhibitions, educational programmes and various activities. She gives lectures on Cultural Management at graduate and postgraduate level. Member of the European Museum Academy, ICOM and TICCIH, and of the international juries for the prizes Heritage in Motion and Živa Award.

Emek Yilmaz (Female) is in charge of Communications and Special Projects at the European Museum Academy (NL) since 2017 and Coordinator at the Panorama 1326 Bursa Museum (TR) since 2018. She comes from an interdisciplinary background of studies with a B.A. in Economics at Marmara University in Istanbul, a Master's in regional studies on the Middle East at the Middle East Technical University in Ankara, and a Sociology PhD at Kangwon National University in S. Korea, where she taught several courses as a teaching assistant. Recently Emek focuses on research topics, specifically on Museums as

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Social Arenas and Places of Social Inclusion and how Museums convey Identity through Cultural Heritage work.

- *Relevant publications/products*

Andrea Rihter & Wim van der Weiden (ed. 2017), "A tiger in a Museum is not a tiger - an anthology of thoughts by Kenneth Hudson", European Museum Academy and Forum of Slavic Cultures.

Emek Yilmaz (ed. 2018), "European Museum Awards – A guide to quality work in museums", at https://www.nemo.org/fileadmin/Dateien/public/NEMo_documents/NEMO_2018_European_Museum_Awards.pdf

Henrik Zipsane (2016), "Investing in Intercultural Dialogue at Jamtli", ENCATC News, Issue 104, Brussels 2016 and http://europeanmuseumacademy.org/2017/wp-content/uploads/2017/05/Investing-in-a-sustainable-intercultural-dialogue-at-jamtli-by-Henrik-Zipsane.doc

Henrik Zipsane (2018), "The Senior Citizens Heritage Learning Initiative", at https://docs.google.com/viewerng/viewer?url=http://europeanmuseumacademy.eu/wp-content/uploads/2018/10/2018-THE-SENIOR-CITIZENS-HERITAGE-LEARNING-INITIATIVE_HENRIKZIPSANE_20181030.pdf&hl=en_GB

Patrick Greene (2016), "First People", http://europeanmuseumacademy.org/2017/wp-content/uploads/2017/05/First-People-written-by-Patrick-Greene.docx

4. EDUCULT, Austria
Website: www.educult.at

EDUCULT is an Independent European Research Institute with long expertise in the analysis, evaluation and assessment in the fields of Arts, Culture, Education and Policy. EDUCULT has a track-record in the coordination and delivery of studies, research and evaluation projects. EDUCULT has excellent experience in policy research, programme evaluation, impact assessment and management on national and multi-regional/cross country level. Lately, it was implementing the Evaluation of the European Heritage Label (EHL) for the European Commission.

Angela Wieser (Female) studied Political Science in Vienna and graduated from the Europe Regional Master Programme in Human Rights and Democracy in South East Europe. She has worked on European Integration and Democratization processes at the University of Vienna, the European Parliament as well as the OSCE Secretariat. At EDUCULT, Angela Wieser is responsible for European cooperation and evaluation projects, specifically in the sphere of Cultural Participation and Cultural Democracy. Angela has been a Senior Evaluator in the Evaluation of the European Heritage Label commissioned by the European Commission; the Leading Evaluator of the Goethe Institute Budapest project "RomArchive" and other evaluations commissioned by the Goethe Institute Headquarters in München or the evaluation of the educational trail project "Wir Machen Schule" commissioned by the Austrian Employees chamber.

Aron Weigl (Male) studied Cultural Sciences and Aesthetic Practice at the University of Hildesheim and received a Doctor's degree in the subject Cultural Policy. In the context of his diploma as well as his doctoral thesis he researched various topics of Foreign Cultural and Educational Policy like Conceptual Design, Governance, Project Management, target group orientation and Transcultural Education. He has been, amongst others, the Leading Senior Expert in the Evaluation of the European Heritage Label commissioned by the European Commission; the Cross-Culture Programme commissioned by the German Federal Foreign Office; the Evaluation of the Support Funding Scheme of the Austrian Social Insurance Fund for Artist; and many more. Besides his engagement with EDUCULT he is working as Editor of scientific publications. Aron is Member of the Society for Cultural Policy.

Veronika Ehm (Female) studied Education and Sociology at the University of Vienna, the University of Copenhagen and the Hebrew University of Jerusalem. Her main focus was Social Inequality, Education and Integration. At EDUCULT, Veronika Ehm is responsible for evaluation and research in the area of

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Cultural Education and Participation. As a Sociologist, Veronika is very experienced in applying Statistical Data Analysis. She has been the Leading Evaluator of the "Max – Artists in Residence at Elementary Schools" programme by the Stiftung Brandenburger Tor; the Second Part of the Evaluation of the "Kunst und Spiele" programme of the Robert Bosch Stiftung and the Senior Researcher for the research project "Potential for Integration of Islamic Schools in Austria" commissioned by the Austrian Federal Ministry of Education, Science and Research.

- *Relevant publications/products*

ECCOM, EDUCULT, Interarts, Intercult (2015). Benchmarks for Diversity Management in Cultural Institutions. URL: http://educult.at/wp-content/uploads/2014/10/benchmarking-tool-with-logos.pdf

EDUCULT (2018). Bridging. State of the Art Report. Overview of co-creative and participatory activities in the sector of amateur arts, voluntary culture and heritage. URL: http://educult.at/wp-content/uploads/2018/10/Bridging_State-of-the-Art-Report_EN.pdf

EDUCULT, Interarts, IRMO, KPY, NCK, Telemarksforsking (2015). Access to Culture – Policy Analysis. Final Report. URL: http://educult.at/wp-content/uploads/2013/04/Final_Report_Print.pdf

- *Relevant projects*

1) **"Evaluation of the European Heritage Label Action" (DG EAC; 2017-2018):** The aim of the evaluation was to assess the implementation of the European Heritage Label (EHL) action from its creation in 2011 until 2017. As an interim evaluation, its purpose was to take stock of the achievements in the first six years of the action's existence with an eye for potential improvements in future implementation. The evaluation assessed the relevance, effectiveness, efficiency, coherence and EU added value of the action. The qualitative and quantitative data collection methods of the study included desk research, open public consultations at the European level as well as interviews and focus groups on the selected sites. These data collection methods were inherently intertwined and adaptation and review of the implementation of the methods was being ensured throughout the whole evaluation process. The quality assurance was meant to lay the grounds for safeguarding the quality and coherence of the data collection process, by making sure that also the field study across the 10 in-depth cases followed the same logic and allowed the core team making meaningful comparisons and synthesis of findings.

2) **"Co-creative Cooperation in the Field of Culture and Heritage" (Erasmus+; 2018-2020):** This European project aims at researching co-creation between civil society and public administrations in field of culture and heritage and at exploring the transformative potential of co-creative collaboration.

3) **"CrossCulture Programme" (German Ministry of Foreign Affairs; 2016):** Assessment of output, outcome and impact of the exchange programme of the Institute for Foreign Relations. Methods used: qualitative interviews, online surveys, observations, document analysis.

4) **"Brokering Migrants' Cultural Participation" (DG Home; 2013-2015):** The project aimed enhancing and stimulating the cultural participation of migrants by improving the capacity of their local cultural public institutions to interact with them. Implementation of a benchmaking system, that supports cultural institutions in analysing and managing their needs and challenges in promoting migrant cultural participation at different levels.

5) **"Access to Culture" (EC Culture; 2013-2015):** The aim was to compare the priority setting on European level and national implementations in terms of provision of access to culture for citizens. Hereby the project established indicators for the further development of Access to Culture policies on European and national level.

5. National Technical University of Athens (NTUA), Greece
Website: www.ntua.gr/en/

Is the oldest and most prestigious Educational Institution of Greece in the field of technology, and has contributed unceasingly to the country's scientific, technical, economic and cultural development since its foundation in 1836. NTUA has already transformed into a new kind of distinguished "Research Technical University" and is on the way of establishing itself as a "Technology Resources Center". The variety of topics of the research projects is wide in the areas of Architectural Design, Smart Cities, Urban and Regional Planning, Conservation of Historical Settings, Landscape Urbanism, History and Theory of Architecture, Visual Expression and Representation.

Nicholas Anastasopoulos (Male) is an Assistant Professor at the School of Architecture of the National Technical University of Athens. His ongoing research concerns Sustainability, the Commons, Alternative Communities and Community Empowerment, Systems Theory, Environmental Management, Participation, and Urban Complexity, topics for which he has written and lectured widely. As Post-Doctoral Prometeo Researcher (IAEN, Ecuador. 2014) he contributed to the FLOK Society project and conducted research on aspects of Buen Vivir and Sustainability.

Hariklia Hari (Female) is Architect, Curator and Researcher on participatory design practices. As a PhD Candidate (NTUA) she is exploring the significance of Community Engaged Territorial Networks to Cultural Management. Her collective work mainly focuses, through projects or exhibitions, on the notion of the community as space of production and transformation referring to questions of participation, free knowledge, auto-organization, creating environmental design strategies, formatting autonomous zones and creating new ways of cultural production, distribution and activism that cross into real-life social situations and institutions. She is currently curating "Microgeographies" project on Participatory Territorial Narrative Practices.

- *Relevant publications/products*

Anastasopoulos, N., Habitat III and Documenta 14: Two global narratives, or some thoughts about making sense of the world. Arts Management Quarterly· Issue No. 127· October 2017·p16

Anastasopoulos, N., 2017. Liminal Architecture: Non-traditional roles for the architect and for architecture, #ThisIsACoop, Catalog of the Greek participation in the Architecture Venice Biennale 2016

Anastasopoulos, N., Reverse Engineering: Imagining and putting into practice Alternative Strategies and Defense Systems. Ed. Olaf Arndt, in Supramarkt, Irene Publishing, 2015.(ISBN 978-91-88061-06-5)pp 355-69.

Anastasopoulos, N., "The crisis and the emergence of communal experiments in Greece", ICSA Proceedings, ed.Graham Meltzer, ISBN: 978-0-9926310-0-0 (ebook, pdf), 2013 pp. 350–359.

- *Relevant projects*

1) **ED-ARCHMAT** | H2020-MSCA- ITN-2017- EJD: Marie Skłodowska-Curie Innovative Training Networks | - | The European Joint Doctorate in Archaeological and Cultural Heritage MATerials Science ED-ARCHMAT is a EU funded Marie Sklodowska Curie Action Innovative Training Network (MSCA-ITN) under the HORIZON 2020 Program whose goal is to provide future leading professionals with the interdisciplinary and intersectoral knowledge, skills and competences needed to address the challenges faced in the analysis, valorization, conservation and fruition for future generations of Cultural Heritage

2) **Reflective societies - cultural heritage and European identity**| H2020-REFLECTIVE | EU.3.6.3 | - | The history of Europe and over sixty years of European integration have fostered the emergence of cultural heritage at different levels – local, regional, national and, recently, European. In all its forms, cultural heritage, values and language are crucial for the collective memories and sociability of groups but also for the personal development of citizens, enabling them to find their place in society. They also serve as a source of inspiration for the development of people's personalities and talents. Extending to the very heart of Europe and constituting a basis for EU construction, they play a key

role in providing a sense of European belonging and EU citizenship as distinct from, but combined with, national citizenship. Cultural heritage and values are at the heart of our capability of overcoming the current EU crisis which could well provide the stimulus for revising EU policies so as to provide a solid basis for the emergence of a truly European cultural heritage and for passing it to future generations.

3) **ENPI CBC Mediterranean Sea Basin Programme** |-|-| European Neighbourhood Policy And Enlargement Negotiations

4) **FLOK Society Project** | - | Researcher | Ecuador's FLOK Society (Free-Libre, Open Knowledge) project was originally commissioned in 2013 through a tripartite agreement involving the Ecuadorian Coordinating Ministry of Knowledge and Human Talent, Senescyt (The Secretary of Innovation and Technology) and the IAEN (The National Institute of Advanced Studies). The project marked the first time a nation state commissioned a practical plan to transition to a mature Peer to Peer Economy. It was initiated to "fundamentally re-imagine Ecuador", based on the principles of open networks, peer production and a commons of knowledge.

6. Institute of Art Design and Technology (IADT), Ireland
Website: www.iadt.ie/

Dun Laoghaire Institute of Art, Design and Technology (IADT) was established in 1997. It is a State Institute and one of 13 publicly funded Institutes of Technology in Ireland operating under the Institutes of Technology Acts 1992 to 2006. IADT is Irelands only higher education institute with a specific focus on the Creative, Cultural and Technological Sectors.

Paraic Mc Quaid (Male) has worked as a Lecturer in the Institute of Art Design and Technology IADT since 2003. He lectures in Visual Cultures, History of Art, Cultural Policy, Cultural & Creative Industries, and Arts Administration. He is Programme Coordinator of the MA in Cultural Event Management in IADT. He holds an MA in Cultural Policy and Arts Administration from University College Dublin, an MFA in Sculpture from the National College of Art and Design Dublin, and a BA in Painting from University of Ulster Belfast. More recently in 2019 Paraic has taken up the position of National Expert Writer of the Irish profile of the Compendium of Cultural Policies with the Boekman Foundation. Paraic continues to work in Collaborative Arts Practice, his most notable intervention being his work as Artistic Director of a project with DePaul Ireland homeless Agency 2008 - 2012.

Kelly Davidson (Female) is a Lecturer in the Department of Humanities and Arts Management, IADT, specialising in Political Economy and Globalisation, European Cinema and the European Audio-Visual landscape, Heritage Tourism and Cultural Policy and Public Cultures. She holds a D.Phil in Critical Ethnographies of Travellers in India (Ulster, 1999) and an M.A. in Media Studies (Ulster, 1995). Her academic research and publications are centered on Strategic Synergies in Cultural and Heritage Tourism Development and Policy in Europe, most recently through a cross-institutional partnership on Post-industrial Urban Regeneration and Cultural Nostalgia with University of West of Scotland. As Director of Leylines NI (2004-07), she undertook Professional Consultancy initiated by strategic frameworks in Tourism, Arts, Heritage and Culture provision in Europe and Ireland. These included EU Peace 2:3 funded research for the Community Relations Council / Community Foundation NI, and consultation on facility repositioning and audience development for Museums and Galleries NI (MAGNI, 2005).

- *Relevant publications/products*

But Belfast has the Reason: Good Vibes, Popular Punk Nostalgia and the Northern Ireland Creative Economy,' Conference paper, Locating Imagination. Popular Culture, Tourism & Belonging, Erasmus University Rotterdam (2017)

Imelda Rocks the Boom Boom: Retro Nostalgia, Imelda May and the Culture of Irish Austerity (with Carlton Brick), Journal of European Culture (JEPC) 8:1 (2017)

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Primitive European Rock and Roll: A Menacing Tour of the Homeless, the Marginal and the Dead, Conference paper, Soundtracks: Music, Tourism and Travel (International Centre for Research in Events, Tourism and Hospitality [ICRETH], Liverpool 2012)

Youth Participation in Culture, EACEA funded research project, 2010.

- *Relevant projects*

1) ***Post-industrial Urban Regeneration and Cultural Nostalgia (2012-18):*** Cross-cultural, cross-institutional research partnership with Dr Carlton Brick, University of West of Scotland, working to explore the growth in cultural 'curation' that has emerged with the convergence and synergies being created in the art, music, fashion and culture industries in Europe. Focus is the reorganisation of post-industrial urban and cultural space through the commodification of 'retro culture' for urban development and cultural tourism. Research has been presented at several international, interdisciplinary conferences.

2) ***Founding member/ Advisory Board, Screen Tourism Research Network (2009-12):*** British-Irish academic partnership between Dun Laoghaire IADT, IT Tralee, University of Ulster, Oxford Brookes University to identify and explore impacts on industry, audiences, communities and related cultural stakeholders of the development and synergy of film and television-based tourism initiatives.

3) ***Founder/Lead Applicant, Leylines Professional Consultancy (2004-08):*** Furthering research and policy development initiated by strategic framework developments in tourism, arts, heritage and culture provision in Europe and Ireland; at this point these sectors were seeking to drive forward through collaborative frameworks and new initiatives the dual agendas of socio-economic regeneration, and social inclusion and community access. Projects included:

    - EU Peace 2:3 funding to work with a sub-sector of the Community Relations Council NI and Community Foundation for Northern Ireland to devise systems and models for self-community group monitoring and evaluation systems (2004/05).

    - Research and consultation on facility repositioning and audience development for the Ulster Museum, funded by Museums and Galleries NI (MAGNI) (2004). This report contributed directly to MAGNI's successful bid for £17 million from the Heritage Lottery Fund in 2005.

4) ***Principle Programme Developer, Proposed BA programme in Cultural Tourism and Heritage Studies (IADT Dun Laoghaire, 2007-08):*** Provision of consultation and academic direction for development of new BA programme in *Cultural Tourism and Heritage Studies* for the School of Business and Humanities, IADT, in response to the 2005 Royal Irish Academy report on *Advancing Humanities and Social Science Research in Ireland*, to achieve goals set out under the OECD and EU Lisbon agendas for Higher Education in Humanities and the Social Sciences. The focus was whole institute development, to build upon staff expertise and research, and to engage with wider strategy frameworks & strategic partnerships across the Arts, culture, education, tourism & heritage sectors in Ireland that seek to bring together technology transfer, cultural innovation, industry and the creative industries in driving forward social and economic regeneration and capacity building. This was based on the centrality of the tourism and heritage industries as a primary source of economic wealth and employment in Ireland, and in recognition of the arts, culture and heritage in fostering cultural pride, prestige and identity.

7. Institute for Development and International Relations (IRMO), Croatia
Website: www.irmo.hr/en/

The Institute for Development and International Relations (IRMO) is a public, non-profit, scientific and policy Research Institute, engaged in the interdisciplinary study of European and international Economic, Political, Cultural Relations and Communication. Founded in 1963 by the University of Zagreb. Primary research areas include Cultural Diversity, Intercultural Communication, Digital Culture and Networks, Creative Industries and Cultural Tourism, Cultural Changes (Cultural Integration and Disintegration), and the process of Globalization and Transition. The Department staff have provided their expertise to

European Parliament, European Commission, Council of Europe and UNESCO, and have participated in various EU funded projects and networks.

Aleksandra Uzelac is Head of the Culture and Communication Department and a Research Adviser at IRMO. She holds a PhD (2003) in Information Science from the University of Zagreb and has 25 years of Professional Experience in the area of Cultural Research related to issues of Digital Culture, Cultural Heritage and Cultural Policies. Dra Uzelac has provided her research expertise in the form of research studies and issue papers for the Council of Europe, the European Commission and European Parliament. She coordinated a group of experts providing Cultural Policy related expertise to European Parliament. She was a Leader of the Jean Monnet Project CULPOL - 'EU Competences and National Cultural Policies: Critical Dialogues (2016 - 2018); and has participated in (and coordinated IRMO team) several other EU funded projects where she contributed her research expertise. Her work has been published in international and Croatian scientific journals and books.

Daniela Angelina Jelinčić (Female) is a Senior Research Adviser at the Institute for Development and International Relations (IRMO) in Zagreb. She holds a Ph.D. in Ethnology from the University of Zagreb and her specific interests are in Cultural Heritage Management, Cultural Tourism, Cultural/Creative Industries, Cultural Policy, Creativity, Experience Economy and Social Innovations. Also, she teaches Cultural Heritage Management, Cultural Tourism, Economy of Culture, Creative Industries at the University of Dubrovnik, University of Zagreb, Zagreb School of Business, and at the UNESCO Chair for Cultural Heritage Management and Sustainable Development, Institute for Advanced Studies (IASK) in Köszeg, Hungary. She is the Author of several scientific books (Innovations in Culture and Development: The Culturinno Effect in Public Policy; ABC of Cultural Tourism; Culture in a Shop Window; Culture, Tourism, Interculturalism), scientific articles and book chapters, national/international studies as well as of several national/local strategic documents, and served as the Council of Europe expert for cultural tourism.

Sanja Tišma Ph.D. in Economics, is the Director of the Institute for Development and International Relations (IRMO) Zagreb, Croatia, as well as the Head of Resource Economics, Environmental Policy and Regional Development Department. Tišma has 30 years of Professional Experience as a Scientist, Project Manager, particularly in the field of Sustainable Development, Public Policies and Strategic Planning. During last 15 years, Ms. Tišma continuously follows the development of Sustainable Development Policy of European Union and is the Author of numerous articles and studies in this field. She is a specialist in Regional and Local Strategic Planning Policy Development. She is also evaluator (Ex-ante, Mid term and Ex-post) of Development Programmes and Projects. Ms. Tišma Coordinated or participated in national and international multi-disciplinary research projects in the field of Economics, Sustainable Development, Public Policies and Environment.

Barbara Lovrinić is a Research Assistant at the Department for Culture and Communication at IRMO, and Assistant to the Editor in Chief of the academic journal *Croatian International Relations Review* (CIRR). She holds a Master Degree in Museology and Heritage Management and French language and literature (2013) from the Faculty of Humanities and Social Sciences, University of Zagreb. She is currently a PhD candidate at the Cultural and Media Management Doctoral Studies at the Faculty of Dramatic Arts in Belgrade. She participated as a team member in the IRMO Jean Monnet project 'EU Competences and National Cultural Policies: Critical Dialogues' (2016-2018). Her knowledge and skills regarding EU institutions have been gained through her previous work at the Court of Justice in Luxembourg and various European project management courses.

- *Relevant publications/products*

Jelinčić, D. A. (2017) Innovations in Culture and Development: The Culturinno Effect in Public Policy. Cham, Switzerland : Palgrave Macmillan, Springer International Publishing AG.

Jelinčić, D. A., Mansfeld, Y. (2019) Applying Cultural Tourism in the Revitalisation and Enhancement of Cultural Heritage: An Integrative Approach // Cultural Urban Heritage: Development, Learning and Landscape Strategies / Obad Šćitaroci, Mladen ; Bojanić Obad Šćitaroci, Bojana ; Mrđa, Ana (ed.). Cham : Springer, pp. 35-43

Jelinčić, D. A., Tišma, S, Senkić, M., Dodig, D. (2017) Public-Private Partnership in the Cultural Heritage Sector. // Transylvanian Review of Administrative Sciences. Special Issue; 74-89

Jelinčić, D. A., Žuvela, A. (2014) Policy Development for Sustainable Use of Cultural Heritage: Implementing the Ljubljana Process in Croatia // Heritage for Development in South-East Euroope / Rikalović, Gojko ; Mikić, Hristina (ed.). Strasbourg : Council of Europe, pp. 87-105.

Primorac, J., Uzelac, A. and Bilić, P. (eds.) (2018) "European Union and Challenges of Cultural Policies: Critical Perspectives". Special Issue of Croatian International Relations Review (1331-1182) Vol 24 (82).

Primorac, J., Obuljen Koržinek, N. and Uzelac, A. (2017) "Access to culture in Croatian cultural policy: moving towards explicit policies", International Journal of Cultural Policy, 23:5, 562-580, DOI: 10.1080/10286632.2015.1102906

Uzelac, A. (2017) "Prema strategiji razvoja digitalne kulture" (Towards the Development of Digital Culture Strategy), In: Jakovina, Tvrtko (ed.). Dvadeset pet godina hrvatske neovisnosti - kako dalje? , Zagreb : Centar za demokraciju i pravo Miko Tripalo, 2017. pp. 497-514.

Uzelac, A., Obuljen Koržinek, N. and Primorac, J. (2016) "Access to culture in the digital environment: active users, re-use and cultural policy issues", Medijska istraživanja (Media research) Vol. 22 (2016) , No. 1., pp. 87-113

- *Relevant projects*

1) **Proomoting cross-border tourism by tailor-made ICT solutions (9/2018 - 9/2019) - Interreg Danube Seed Money Transnational Programme – Project partner:** BorderPass addresses Priority 3 of the EU Strategy for the Danube Region, Culture & tourism. From the focus areas pre-defined by the Danube Seed Money Facility, the project addresses Nr.2, i.e. to "Develop applications and other innovative tools for tourists that use information and communication technologies (ICT) promoting and clearly illustrating the natural and cultural heritage of the Danube region". The project addresses border regions across the Danube macro-region and aims to promote cross-border tourism by tailor-made ICT solutions. The aim is to develop a platform, which provides the users with information on both sides of a border region, thus presenting an integrated touristic offer and a more diverse destination for visitors.

2) **KEEP ON: Effective policies for durable and self-sustainable projects in the cultural heritage sector (6/2018 – 5/2023) - Interreg Europe – ref. No: PGI05090 - Advisory partner:** The main aim of the KEEP ON project is to improve public policies in the cultural heritage sector in terms of delivering high quality projects that allow results to remain sustainable with reasonable public funding and have long-lasting impact on regional development. Both policy organisations and cultural institutions should plan for sustainability long before the project start date. When the public funding is over, how do institutions sustain their work for the future? How do they get funds for their future functioning? How can public policies support beneficiaries in the self-sustainability of their projects? The KEEP ON project will address these questions from an EU-wide, interregional perspective.

3) **RESTAURA: Revitalising Historic Buildings through Public-Private Partnership Schemes (6/2016 – 5/2019) - Interreg Central Europe – ref. No: CE339 - Project partner:** RESTAURA is aiming at identifying, testing, evaluating and promoting good practice on Public-Private Partnership in revitalisation of historical cities and buildings. PPP allows to combine the assets and skills of the public and private sector, while protecting heritage resources at the same time. The outputs of the project will be strategies and action plans, tools, pilot actions and workshops for public authorities willing to renovate and bring a new life to abandoned and deteriorated historic buildings with the use of PPP models. RESTAURA brings together 4 CE countries: Poland, Slovakia, Slovenia and Croatia. In each of these countries a mix of public and private institutions participate (local authorities, research and education institutions, PPP associations and NGOs, development agencies) to jointly develop and implement project's outputs in a topic, that is still very new to EU Member States from Central Europe, and transnational exchange of experience is needed.

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4) **CULPOL: EU Competences and National Cultural Policies: Critical Dialogues (9/2016 – 9/2018) - Jean Monnet Project - contract number: 575442-EPP-1-2016-1-HR-EPPJMO-PROJECT – Project Coordinator:** CULPOL aimed to promote discussion and reflection on the impact of the EU agenda on the Croatian cultural policy. The overall objective of the project was to establish closer cooperation and networking among cultural policy research community, cultural professionals, and policy-makers responsible for the implementation of different EU instruments and agendas. The project served as a platform for information and communication about the relevant cultural policy processes at the European Union level that will contribute to enhancing knowledge about the impact of the EU and its processes on the national cultural sector. The focus was placed on EU's soft cultural policy instruments and mechanisms (e.g. Open Method of Coordination, Creative Europe program, European Capitals of Culture initiative) that represent de facto policy approach to the various cultural policy issues and their related instruments.

5) **Access to Culture: Policy Analysis (5/2013 - 4/2015) - European Commission, Programme Culture 2007-2013 - Agreement number: 2013 - 1384 / 001 – 001 - Project partner:** The aim of the project is to examine the gap between the social reality and political normativity in the area of access to culture, in order to develop recommendations for raising awareness about these issues both at the national and at the European level. The project used policy analysis approach in order to examine the European and national dimension dealing with access to culture. Assessment and development of public policy indicators have been performed, as well as the assessment of the implementation of the policies dealing with access to culture in the EU countries and beyond. The project also aimed to encourage open communication between the stakeholders of the policy process, which was achieved through their involvement at certain stages of the project and through continuous communication and information dissemination.

4.1.b. Advisory Board

- **Professor Pat Cooke:** *University College Dublin*

University College Dublin, Ireland
Webside: www.ucd.ie

Is a Research University in Dublin, Ireland. It has over 1,482 faculty and 32,000 students, and it is Ireland's largest university. The university originates in a body founded in 1854 with John Henry Newman. University College Dublin is frequently ranked among the top universities in Europe. There are five Nobel Laureates amongst University College Dublin's alumni and current and former staff. The 2018 QS World University Rankings ranks UCD #168 worldwide, and ranks it #75 for graduate employability. At the heart of UCD's Research Strategy is the ambition to address the challenges that will shape Ireland's future and its role in the world. Research themes include, Agri-Food; Culture, Economy and Society; Energy; Environment; Health; and ICT.

Pat Cooke (Male) has been director of the MA in Cultural Policy and Arts Management since 2006. Previously, he worked for Ireland's State Heritage Service for over twenty years, where he was Director of both Kilmainham Gaol and the Pearse Museum. As a Heritage Sector Manager, was pioneered the use of Museums and Historic Properties in Ireland as Sites for Major Art Projects. His experience in the Heritage Field includes Producing Cultural and Historical Exhibitions and Audio-Visual Presentations, and the Management of Historic Sites in line with best principles of conservation practice. He was Chairman of the Irish Museums Association (2002-06). He has been Assessor for the Heritage Council's Museum Standards Programme for Ireland and currently Member of the Advisory Group charged with overseeing and revising standards for that programme.

- **Carla Di Francesco:** *Fondazione Scuola dei Beni e delle Attività Culturali -* Scuola di *Patrimonio*

Scuola di Patrimonio, Italy
Webside: www.scuolapatrimonio.beniculturali.it/

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Scuola di Patrimonio is an Independent Institution for Training, Research and Advanced Studies established by the MiBAC. It has to focus on high level capacity building in the Management of Cultural Heritage Institutions in four areas of activity: Training, International Collaboration, Research, and Dissemination. The programmes of continuing education and initial training are based on the specific requirements of those interested and on the different degrees of experience in the field and the request of institutions alike. Innovative research projects will be conducted through analysis and studies with a practical, hands-on approach to specific themes and cases. The Fondazione promotes initiatives and events (such as workshops, seminars, and conferences) to foster the dissemination of knowledge among scholars, operators, and professionals.

Carla Di Francesco is former Secretary General of the Ministry of Cultural Heritage and Activities and of the Tourism. Graduated in Architecture, she was Superintendent for Property Architectural and Landscaping of Milan, coming from 20 years of experience as an Architect in the Superintendency of Ravenna in Ferrara, where occupied with the Protection of Landscape and Monumental Assets, of Museums, and has designed and directed numerous restoration works. Appointed Director Region for the Cultural and Landscape Heritage of Lombardy in 2004, has held a similar position in Emilia-Romagna until 2014. She was a Teacher at Contract within the disciplinary scope of the Restoration in the Faculty of Architecture of the Universities of Ferrara, Milan, Bologna. She is the Author of numerous publications in the field of Conservation of Architectural Artifacts of the History of Protection.

- **Evinc Dogan**: *Akdeniz University*

Akdeniz University, Turkey
Webside: www.akdeniz.edu.tr/

From its foundation in 1982 to the present day, Akdeniz University has played a significant role which provides added value to the entire country from a starting point in the West Mediterranean region by implementing important activities of vital importance in the fields of Education, Research and Development, and in the services it provides to society. Akdeniz University has put its signature on a list of outstanding successes in the fields of Health, Science, Social Development, Education, Language and Arts at both the national and international level. Nowadays is one of the leading universities in Turkey, with an outstanding academic staff, a well-designed physical and scientific infrastructure, social and cultural opportunities, a Record of International Cooperation and a Commitment to Continuous Development.

Evinc Dogan (Female) has a PhD in Management and Development of Cultural Heritage obtained from IMT Institute for Advanced Studies Lucca (Italy). She holds MSc in History of Architecture from Istanbul Technical University and BA (Hons) in Tourism Management from Bogazici University. She has been a visiting PhD fellow at Regent's University London, The Regent's Centre for Transnational Studies (RCTS) for a year (2011-2012), doctoral research fellow at Istanbul Studies Centre, Kadir Has University, post-doctoral research fellow at ASK Research Centre, Bocconi University (2015) and University of Belgrade (Urbanism Department) (2015-2016) which is supported by TUBITAK BIDEB 2219 – International Postdoctoral Research Scholarship. She has been Assistant Professor at Okan University Tourism and Hotel Management Department. Currently, she is a member of the Tourism Faculty at Akdeniz University.

- **Federica Galloni:** *MIBAC - Ministero dei Beni Culturali / Direzione Generale Arte e Architettura Contemporanee e Periferie Urbane*

Ministero dei Beni Culturali (MIBAC), Italy
Webside: www.aap.beniculturali.it

The MiBAC deals with the Preservation, Valorisation and Utilisation of the Cultural Heritage as well as with the safeguard of the landscape in the more general context of fine arts. Since 2013 the Tourism Portfolio has also been assigned to MiBAC. The results of the actions of the DGAAP are put into effect through competitions and commissions, acquisitions, education programmes, exhibitions and events, research projects and much more.

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Federica Galloni (Female) is Director General of the Directorate General for Art, Contemporary Architecture and the Urban Suburbs of the Ministry for Cultural Heritage and Activities. Also is the Commissioner of the Italian Pavilion at the Venice Biennale and Chairman of the Steering Committee of the Committee for Foundations of Contemporary Art. Architect, she specialized in the themes of Urban Recovery and Architectural Restoration. In 2006 she was appointed Superintendent for Architectural Heritage and Landscape of the City of Rome and in 2010, as General Manager, he moved to Head the Regional Directorate of Cultural Heritage and Landscape of Lazio. She has numerous interventions in conferences, scientific publications and contributions in catalogues, currently his research topics refer to the Remodelling and Recovery of Urban Suburbs, with particular attention to the Protection of the Landscape and Urban Transformations.

- **Beatriz García:** *University of Liverpool - Institute of Cultural Capital and Senior Research Fellow in Communication Studies*

University of Liverpool - Institute of Cultural Capital and Senior Research Fellow in Communication Studies, United Kingdom
Webside: www.liverpool.ac.uk/communication-and-media/

The Department of Communication and Media is a leading Centre for the study of how ideas are influenced, expressed and shared. In 2009, Communication and Media launched as a new Department within the School of the Arts, however the roots of the discipline at the University of Liverpool stretch back several decades. Research feeds insights such as these directly into their teaching – and influence many fields, from politics to entertainment, healthcare to e-business.

Beatriz García (Female) has been at the forefront of debates about Culture-Led Urban Regeneration since 1999. Her pioneering work on the Cultural Impact and Legacy of Mega-Events has informed City Strategists around the world, from Sydney to Liverpool and from Taipei to London. García grew up and was educated in Barcelona, specializing in International Communication Policy, City Marketing and then emerging field of Cultural Policy Research. During her studies, she lived in France, Australia, the USA, and the UK, where she now resides. Since 2016, she is a Member of the IOC Culture and Olympic Heritage Commission and, in 2017 she has joined the European Capital of Culture Selection Panel, appointed by the European Commission.

- **Rob Mark:** PASCAL Observatory - *Learning Cities Networks (LCN)*

PASCAL Observatory - Learning Cities Networks (LCN), United Kingdom
Webside: www.lcn.pascalobservatory.org/

LCN are interactive policy-oriented groups of stakeholders within cities, sharing ideas and experience directed at innovative responses to the big issues confronting cities. The outcomes of participation will define key characteristics for sustainable learning cities for the future. An important staging point for the networks and the Learning Cities 2020 initiative as a whole was the PASCAL conference in Glasgow in 2016.

Rob Mark (Male) is currently PASCAL Learning Cities Project Coordinator and Honorary Senior Research Fellow at the University of Glasgow in Scotland, United Kingdom and at the Higher Education Research Centre, Dublin City University, Ireland. www.dcu.ie/herc/index.shtml. He is also Vice Chair of the UK University Association of lifelong learning www.uall.ac.uk/. He has a strong interest in Heritage and Culture and has championed programmes in this field in his role as Director/Head of Lifelong Learning. Currently he is involved with the development of links between the PASCAL Learning City Project and the European Museum Academy which includes the organisation of joint seminars and the development of professional development programmes for those working in the field of Heritage and Culture.

- **Christine Merkel:** *German Commission for UNESCO*

German Commission for UNESCO, Germany
Webside: www.unesco.de

The German Commission for UNESCO is an Intermediary of Foreign Cultural and Educational Policy and is supported by the Foreign Office. It acts as a link between the state and civil society and as a National Office in all UNESCO fields of activity. Its work focuses on the promotion of High-Quality and Equitable Education as well as the Protection, Conservation and Sustainable Development of Cultural and Natural Heritage.

Christine Merkel (Female) is Expert in International Relations, Strategy Development and Public Policies in Arts, Media and Culture. Head, Division of Culture, Communication, Memory of the World, German Commission for UNESCO. Government Expert at UN and European level, .e.g. Germany's IGC membership of the 2005-UNESCO Convention (2007-2011, 2015-2019), 2018/2019 Member of delegation to the Internet Governance Forum and Freedom Online Coalition. National Contact Point, liaising with seven national ministries and 16 State Level authorities as well as convening the Civil Society Consultations on the 2012, 2016 and 2020 Quadrennial Reports. Member of the EU/UNESCO Expert facility on the 2005-Convention to Advise Local and National Governments on Cultural and Media Policies for Sustainable Development (2019-2022, since 2011). Author of the 'Public Service Media' Chapters in UNESCO's 2018 and 2015 Global Reports "Re/Shaping Cultural Policies" and Member of its Editorial Board, as well as several dozens of papers on the subject area.

- **Kathrin Merkle**: *Council of Europe*

Council of Europe, France
Webside: www.coe.int

The Council of Europe is the Continent's Leading Human Rights Organisation. It includes 47 member states, 28 of which are members of the European Union. It advocates Freedom of Expression and of the Media, Freedom of Assembly, Equality, and the Protection of Minorities. It promotes Human Rights through international conventions. It leads the "Compendium" (www.culturalpolicies.net) is a web-based and permanently updated information and monitoring system of national and European Cultural Policies and Trends. In particular, the system addresses Multi-Stakeholder Governance in the Arts, Heritage and Media Domains, Cultural Diversity, Intercultural Dialogue and Social Cohesion, Cultural/Human Rights and Citizens' Participation.

Kathrin Merkle (Female) is the Head of the Culture and Cultural Heritage Division of the Directorate of Democratic Participation at the Council of Europe and is Secretary to the Steering Committee for Culture, Heritage and Landscape. She oversees the Organisation's work on Culture and Democracy Indicators, Culture and Digitisation/Internet of citizens, the European Cultural Heritage Strategy for the 21st century and the Council of Europe's heritage conventions. Trained as a Sociologist and Political Scientist, Kathrin worked for UNESCO Statistics in Paris before joining the Council of Europe in Strasbourg in 1993.

- **Valya Stergioti:** *Interpret Europe – The European Association for Heritage Interpretation*

Interpret Europe, Germany
Webside: www.interpret-europe.net/feet/home/

Interpret Europe is a Membership-based Organization, registered as a Charity in Germany. It has more than 800 members from more than 50 countries. Interpret Europe's mission is to serve all who use first-hand experiences to give natural and cultural heritage a deeper meaning. Interpret Europe is a member of the European Heritage Alliance and of the European Commission's Stakeholder Committee for the 2018 European Year of Cultural Heritage. The study Engaging citizens with Europe's cultural heritage has been awarded with the European Commission's 2017 Altiero Spinelli Prize (First Prize).

Valya Stergioti (Female) has a degree in economics. She is the IE Training Coordinator of Interpret Europe. She is a Freelance Interpretive Trainer and Planner and founded Alli Meria (meaning the "Other Side") to

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promote Heritage Interpretation in her country. Interested in 3 intersecting fields: Non-formal Education, Adult Training and Heritage Interpretation. She has expanded upon this occupation since 1999 to include adult training in heritage interpretation, with long-term collaborations (Interpret Europe – the European Association for Heritage Interpretation, the Heritage Management Organisation, the Mediterranean Institute for Nature and Anthropos – MedINA, the Mayopolski Instytut Kultury, the Mediterranean Centre for the Environment, Alexandroupolis Secondary School for Adults, the Greek Guide Association,) workshops, and active participation at conferences in Greece and abroad.

4.1.c. Stakeholders

AIRA ANDRIKSONE - LATVIAN ASSOCIATION OF CASTLES, PALACES AND MANORS (LACPM)

LACPM (www.pilis.lv/en/about-us) is a Professional Association established in 2000 in Cirstu Manor and currently has 105 members. The main goals of the Association are to promote the Preservation of Latvian Cultural Heritage; Exploration, Maintaining, Reconstruction, adjusting for various uses, use and development of the unique and Valuable Cultural Heritage and the Environment of castles, palaces and manors; to facilitate development of Tourism, Culture and Creative Industries and related infrastructure and services at castles, palaces and manors; to expand public access to castles, palaces and manors; to promote Preservation of Cultural Heritage, to increase the society's awareness of Cultural Heritage and involvement in the protection of Cultural Heritage.

Aira Andriksone (Female) is the Executive Director at Latvian Association of Castles and Manors since 2013. Civil servant with long-term experience and leadership in: drafting of policy papers, laws and by-laws, governmental regulations, international agreements in the field of tourism and supervising of implementation of the tourism state policy; representing of Latvia to the United Nations World Tourism Organisation, European Commission's Tourism Advisory Committee, European Commission's Tourism Sustainability Group, Baltic 21 Tourism Task Force; international cooperation; project management; organizing and participating in international conferences and events with presentations and presiding of plenary/working sessions. Interested in projects, research as well advising on policy planning, tourism, and EU issues.

MATTEO BAGNASCO - FONDAZIONE SAN PAOLO

Fondazione San Paolo (www.compagniadisanpaolo.it/ita/la-Fondazione) pursues socially useful objectives in order to promote Cultural, Civil and Economic Development with the income from its assets. The broad thematic areas in which its institutional activity is articulated: research and health, the arts, cultural heritage and activities, cultural innovation, and social policy.

Matteo Bagnasco (Male) is the Head of the Cultural Innovation Department of the Fondazione San Paolo. Its purpose is to carry out Compagnia's Strategic Plan for its fields of operation, guaranteeing utmost added value for the territory through integration of economic grants with contributions in kind and through the capitalization of knowledge in favor of internal and external contexts.

GIOVANNA BARNI - COOPCULTURE

CoopCulture (www.coopculture.it/en/) is the Largest Italian Cooperative operating in services for Cultural Heritage and in the Integrated Enhancement of Territories. It is positioned to offer answers and solutions to the increasingly complex needs of a continuously evolving sector, from the perspective of integration between Cultural heritage and Territory and between Culture, Tourism and Local Economy.

Giovanna Barni (Female) is Expert in Project Management, Communication and use of Cultural Heritage. She has been President and Head of Business Development at CoopCulture since 2010. In 1990 she was one of the Founders of Pierreci (First Design, Production and Promotion of Cultural Services), holding the position of President and Sales and Marketing Director; from 2006 to 2010 she was CEO of Scabec S.p.A.

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(first mixed company for the enhancement of the Cultural Heritage of the Campania Region). Engaged in the promotion of the cooperative model in the sector and in the implementation of network projects with complex partnerships, she is today the Vice President of the Legacoop Culture, Tourism and Communication Sector.

INÊS BETTENCOURT DE CÂMARA - MAPA DAS IDEIAS

Mapa das Ideias (www.mapadasideias.pt/?lang=en) is a Portuguese Company dedicated to the relationship between Museums, Publics and Communities since 1999. Map of Ideas has opened its range of offerings to other niches of the Cultural and Creative Economy, with consulting services (from Public Management to Planning) as well as a variety of solutions from pedagogical kits to exhibition design for multiple customers. Ongoing research and networking work invites synergies and innovative products and processes.

Inês Bettencourt de Câmara (Female) created Mapa das Ideias with Ana Fernambuco in 1999. After 19 years, the Company is a reference in Cultural Mediation, Management and Merchandising Development. Both founded non-profits HPP and A Reserve – for Culture and Social Issues, Entrepreneurship and Education. Her PhD. in Social Sciences, regarding the social relevance of Museums and its potential for the visitors is almost finished. She has been responsible for the development of Museum Mediation Projects in Portugal, as well as European projects, ICOM, APOM and ESA member. Author of several articles and whitepapers about museums and their visitors.

MARCO BISCIONE - MUSEO M9

M9-Museo del'900 (www.m9digital.it/it/) is a major urban-regeneration project being built by the Fondazione di Venezia on mainland Venice. The Fondazione di Venezia is giving the city, Italy and the world a national museum so that the Italian people may get to know the century that most contributed to forging their modern identity in the conviction that knowledge is an indispensable starting point from which to design an individual and collective future.

Marco Biscione (Male) is the Director of M9 Museum since 2018. He has to his credit a long experience matured within structures dedicated to the enhancement and dissemination of culture. Called from 2002 to 2006 as a national expert seconded from the Ministry of Cultural Heritage and Activities to the Directorate General for Education and Culture of the European Commission, from 2006 to 2009 he was the representative of the General Secretariat of the MIBAC for European Union programs and policies in the Culture sector. Director of the Civic Museums of Udine from 2010 to 2014 (over 50 temporary exhibitions organized under his direction), in 2015 he took over the leadership of the Mao, the Museum of Oriental Art in Turin (13 temporary exhibitions and more than 120 events, laboratories and conferences organized during its management).

LUCA BORZANI - LA CITTÀ ON LINE JOURNAL OF CIVIL SOCIETY

La Città on line journal of civil society (www.la-citta-online.it/) an Italian Newspaper to return to talking the works, schools, districts, Social Innovation and Poverty, without localisms, but with the look in the world and a new start (left).

Luca Borzani (Male) is the Director of La Città on line journal of Civil Society; President of the Fondazione Palazzo Ducale of Genoa from 2008 to 2018. Was Councilor for Culture for the Municipality of Genoa from 1997 to 2007.

MARCO CAUSI - ASSOCIAZIONE PER L'ECONOMIA DELLA CULTURA

Associazione per L'Economia della Cultura (www.economiadellacultura.it/) was created in Rome in 1986, the Association has among its aims those of "promoting the knowledge and development of the Economy in the Sector of Cultural Heritage, Entertainment and the Cultural Industry, fostering the

integration between institutional design and more management effective public intervention, creating a link between cultural and social needs and economic use of cultural assets, activities and production ".

Marco Causi (Male) is Associate Professor of Industrial Economics and Applied Economics at Roma Tre University. Member of the Republic of Italy between 2008 and 2018. He was presenter or speaker of the reform of the discipline of the "Golden Share" for the defense of national strategic interests (so-called "Golden Power"). Between 2001 and 2008 he served as Deputy Mayor for the Economic, Financial and Budgetary Policies of the Municipality of Rome, where he held the position of Deputy Mayor between July and October 2015. Economic Expert of the Ministry of the Treasury (2000-2001) and Presidency of the Council of Ministers (1996-1998).

ULRIKE DITTRICH - HAMBACH CASTLE FOUNDATION

Hambach Castle Foundation (www.hambacher-schloss.de/index.php/37-stiftung/allgemein2/356-welcome) in 2014 was awarded the European Cultural Heritage by the European Commission for its important role in history and culture. Hambach Castle is a Centre for cultural activities offering a broad spectrum of cultural events such as cabaret, concerts, panel discussions and theatre for children and adults. A number of exciting media and interactive stations have been set up to entice people of all ages to comprehend, to learn, and to experience about German and European history.

Ulrike Dittrich (Female) works as Manager of Hambach Castle Foundation in Rhineland-Palatinate, Germany. Ceramist, Engineer, Cultural Manager, Chief Clerk. Key activities: Cultural and Event Management, Marketing and PR-executive, facility Management, contact partner for Networking affairs, responsible supervision of the renovation and rebuilding of Hambach Castle and the related coordination with the state office for the preservation of Historical Monuments. Professional experiences in supervision of an international exhibition, re-enactment (18th and 19th century).

CORNELIA DÜMCKE - CULTURE CONCEPTS

Culture Concepts (www.cultureconcepts.de/home-en) is a Berlin-based Organization that works at the Interface of Art, Culture and the Economy in a local, national and international context. The office specializes in Project Development, Organizational Consulting and Evaluation in the field of Culture and Creative Industries and related Policy Areas (Cultural Policy, Development Policy, City and Regional Development) in regional, national and international contexts.

Cornelia Dümcke (Female) is a Cultural Economist and works as a Project Developer, Arts Consultant and Moderator. She is the Founder of CULTURE CONCEPTS. Her thematic specialization focuses particularly on issues of Culture and Development, Cultural Economy, Cultural Tourism, as well as on the Museum, Theatre, Dance, Opera and Festival Market. 2015/2016 she was commissioned as a Moderator within the Project CulturalBase.eu which had a specific focuses on Memory, Identity and Creativity in Europe. Since 2015, on behalf of the European Commission, Directorate General for Research & Innovation she is assessing Cultural Heritage Projects in Europe.

DOROTA ILCZUK - WARSAW SCHOOL OF SOCIAL SCIENCES AND HUMANITIES

SWPS University (www.english.swps.pl/) was established in 1996. It is the first Private University in Poland. The University has been ranked by the Ministry of Science and Higher Education as the leading higher education institution offering Social Sciences programs in Poland. Since its inception it has been dedicated to teaching and research analyzing the actual impact on the lives of individuals and communities.

Dorota Ilczuk (Female) has a degree in Economics. She specializes in the subject of Management in Culture and Creative Industries. She is scientifically interested in the problems of Civil Society, the Creative Economy, the Artists' Labor Market and the role of Producers in the Creative Economy. She is Founder and long-term President of the Pro-Cultura foundation. In 2001-2007 she was President of CIRCLE (Cultural

Information and Research Centers Liaison in Europe). As an Expert of the Council of Europe and the European Union, she participates in International Research Programs devoted to the problems of culture.

HANNA LÄMSÄ - THE ASSOCIATION OF CULTURAL HERITAGE EDUCATION IN FINLAND

The Association of Cultural Heritage Education in Finland (www.kulttuuriperintokasvatus.fi/in-english/) is a National Non-governmental Expert Organization. The mission of the Association is to serve as an expert, influencer, promoter, developer, and communicator of Cultural Heritage Education and Education of Culturally Sustainable Development. The target is to strengthen the cultural competence of especially children and youth – information, skills, and experiences regarding diverse Cultural Heritage – and to support identity building, involvement in Culture and Society, and the fulfilment of Cultural Rights.

Hanna Lämsä (Female) is the Executive Director at Association of Cultural Heritage Education in Finland since 2009. She is professional in Cultural Heritage Education, Cultural Heritage Policies, Cultural Politics and Cultural Sustainability in national and international level. Also, she is professional in Management, Leadership, Finance and Financial Administration, Networking, Human Resources and Media Relations. Her academic background is in Social and Moral Philosophy and Political Sciences. During the 2018 she was the Project Manager of the European Union wide European Cultural Heritage Year.

ALESSANDRO LEON - CENTER FOR RESEARCH AND STUDIES ON LABOR PROBLEMS, ECONOMY AND DEVELOPMENT (CLES)

CLES (www.cleseconomia.com/) is an Independent Research Center on Economic and Social Issues. With more than 25 years of experience, CLES is today a body deeply entrenched in the sector of Italian Research Institutes. Specialized consulting and support activities for the Public Administration and other agencies and public institutions, non-profit companies and large private institutions. Also accompanied Public Administrations in the complex functional reorganization in strategic public sectors such as the cultural one (foundations, companies, institutions) or local development (regional agencies).

Alessandro Leon (Male) is the President of CLES. He is a Senior Expert in Public Policies with over 25-years of professional experience in Economic Planning, Public Policies Evaluation, Industry and Regulation, Labor Market Policies, Local Development, applied cost-benefit analysis, and with over 12 years of experience in Technical Assistance to Public Administrations in the Planning, Management, Implementation, Monitoring and Evaluation of plans and programs financed by EU Funds. In his current position he overseen several research studies carried out by CLES in a variety of cultural sectors such as heritage, performing arts, audiovisual, libraries and archives, contemporary arts. He is also involved in other areas such as tourist and welfare issues, economic planning, industry and regulation, labour studies, applied cost-benefit analysis.

FLORIAN MEIXNER - AUSTRIAN COMMISSION FOR UNESCO

The Austrian Commission for UNESCO (www.unesco.at) (Österreichische UNESCO Kommission, ÖUK) is part of the international network of National Commissions as foreseen in the constitution of UNESCO as junctures between UNESCO and its Member States. The Commission advises and supports the Austrian Government in the implementation of UNESCO's programmes and acts as a connecting point between governmental bodies, civil-society and other relevant stake-holders.

Florian Meixner, (Male) BA MA, studied History and History of Science in Graz (Austria) and Calgary (Calgary). Worked in the fields of Academia and Culture. He is now Programme Specialist for World Heritage and Protection of Cultural Heritage for the Austrian Commission for UNESCO.

GRÁINNE MILLAR - GM INNOVATIONS

GM Innovations (www.gminnovations.ie/) provides Consultancy Services to organizations in the public and private sector that support collaboration and connected growth across organizations and teams. It uses

Strategy, Innovation and Creative Thinking Processes and tools to help organizations understand their unique competencies and skills and develop strategies for transformation and growth through networks, clusters and multi-disciplinary teams.

Gráinne Millar (Female) is the Founder of GM Innovations in 2014. She has over 20 years' experience leading and facilitating collaborative projects and networks across the Creative Industries, Culture, Tourism, Science and Agri-food sectors. She established and developed the hugely successful innovative project Culture Night into an all-island phenomenon in partnership with the Department of Arts, Heritage and Gaeltacht. Gráinne has been invited to speak at conferences in Ireland and Europe on the topic of Innovation and Collaborative Networks. She has had articles published in the media and specialist productions.

MARCELLO MINUTI - SCUOLA DI PATRIMONIO

Scuola di Patrimonio – (Fondazione Scuola dei Beni e delle Attività Culturali) (www.scuolapatrimonio.beniculturali.it/) is an Independent Institution for Training, Research and Advanced Studies established by the MiBAC. It has to focus on high level capacity building in the Management of Cultural Heritage Institutions in four areas of activity: Training, International Collaboration, Research, and Dissemination.

Marcello Minuti (Male) has a degree in Economics from the University of Roma Tre, a PhD in "Economics and Management of Companies and Public Administrations" and a specialization as "Cultural manager" released by Fondazione IDI (Istituto Dirigenti Italiani). From 2008 to 2016, he was Founding Member, Partner and Member of the Board of Directors for the company Struttura Srl whose mission was focused on professional Research, Consulting and Coaching of Public Administrations for the Management of Cultural Heritage and Activities. Marcello Minuti is now the General Coordinator of the School of Cultural Heritage and Activities Foundation whose aim is to develop human resources, research, knowledge, and innovation within the Ministry of Cultural Heritage and Activities.

SIMONA NEUMANN - TIMIȘOARA 2021 – EUROPEAN CAPITAL OF CULTURE

Timișoara 2021 – European Capital of Culture (www.timisoara2021.ro/) since Timisoara was entitled ECoC 2021, the past two years have been rich and challenging. In 2019, they continue building the capacity of Culture Makers to Design and Manage International Projects in Timisoara.

Simona Neumann (Female) is the Executive Director of Timisoara European Capital of Culture Association since January 2013. Simona Neumann has 18 year experience in International Relations and European affairs in positions Management, Coordination and Execution in various Romanian and International Organizations. In 2009-2012 she worked at the European Commission, the Directorate General for Enlargement at Brussels and Nicosia where she has run complex Reconciliation Programs and Society Development Civilian Programs, European Union Policies and those on academic exchanges international, all in a very sensitive political context. She obtained Certificate in Strategic Management Studies of Non-governmental Organizations at Harvard University, Kennedy School of Government, Executive Education. Has the title of Doctor of International Relations and European Affairs, specialization - Public Diplomacy, obtained at the Babeş-Bolyai University in Cluj in 2011 and that of the Master in Studies European University of the West University of Timisoara obtained in 2000.

MARIA PHILIPPI - ELEUSIS - EUROPEAN CAPITAL OF CULTURE 2021

The Eleusis - European Capital of Culture 2021(www.eleusis2021.eu/?lang=en) final bid book is summarized in the phrase "Transition to Euphoria". The vision for the artistic programme is incited by the challenge of sustainability and nourished by the belief that art and culture are the "keys" to building a sustainable future. It is worth noting that year 2021 marks the 200th anniversary of the Hellenic Revolution, which led to the establishment of the Modern Greek state. Revolutions are times of transformation and transition.

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Maria Philippi (Female) is Communication & Media specialist, studied Business Administration, for which she also obtained her Master's Degree with a specialization in tourism. Her experience of over 14 years in the sectors of Strategy & Communication Departments in large industrial groups offered her the opportunity to develop Sustainable Development Projects for regions and local communities as part of these companies' Corporate Social Responsibility Strategy. Maria continues with her research in the field of Hybrid Spaces and the connection of Technology, Culture and Economic growth at the University of Athens – Research Institute of Applied Communication. She founded the innovative www.ecoktima.com in 2011, which is the first hybrid space for augmented learning and experience, and she is currently fully dedicated to her role as CEO with the aim of implementing the vision of Eleusis 2021.

MARTA RAGOZZINO - POLO MUSEALE OF BASILICATA - MIBAC

Polo Museale of Basilicata (www.musei.basilicata.beniculturali.it/) is located in the Convent of Sant' Agostino in Matera, a monumental complex dating from the late 16th century. It has become operational since March 9, 2015. Is the point of connection between the center and the suburbs: it works to foster dialogue between state and local authorities, between public and private museums, for the construction of the Regional Museum System.

Marta Ragozzino (Female) is from April 13, 2010 Head of II Band at the Ministry for Cultural and Tourism Activities. From May 20, 2010 Superintendent for the Historical and Artistic Ethno-Anthropological Assets of Basilicata; from 8 February 2013 he is Interim Supervisor for the Historical and Artistic Ethno-Anthropological Goods of Puglia and from March 9, 2015, when he became Operative Director of the Basilicata Polo Museum.

DRAGANA LUCIJA RATKOVIĆ - MUZE D.O.O. / MUSES LTD

Muze d.o.o. / Muses Ltd (www.manasteriotti.com/muze) is a Croatian Consultancy and Project Management Agency in Culture and Cultural Tourism. Uniting expertise from the areas of Protection of Cultural Properties and Museology, Cultural Policies and Cultural Tourism with skills in Creative Cultural and Heritage Management, Muses are acting as a partner to local communities, art, culture and tourist organizations and institutions, as well as non-government organizations. Company activities include: high-quality programming, planning, implementation, efficient management and promotion of diverse projects in the domains of Culture and Cultural Tourism.

Dragana Lucija Ratković (Female) is the Founder and Director of Muses. Once finishing Zagreb's Legendary "Culture" (Obrazovni Centar Za Kulturu I Umjetnost / Educational Centre for Culture and Art), she enrolled in the Study of Comparative Literature and Art History at the Faculty of Humanities and Social Sciences in Zagreb. She was employed at the then Institute for the Protection of Cultural Monuments at the Ministry of Culture in Zagreb, and then in Poreč, where until 2004, she worked on the Protection of Cultural History. In 1997 she was awarded a scholarship with UNESCO for professional training in the field of the Conservation and Restoration of Cultural Assets in Poland.

PETER ROBBINS - DUBLIN CITY UNIVERSITY BUSINESS SCHOOL

Dublin City University Business School (www.business.dcu.ie/why-dcu-business-school/) is one of Europe's most dynamic young Business Schools; DCU Business School is truly alive with ambition. They have redefined the boundaries of the traditional Business School, collaborating on multiple levels with Business, with industry and with government. They focus on strategically important Business Sectors in Ireland, and take pride in the impact our engagement has on Irish industry and, increasingly, on international organizations.

Peter Robbins (Male) is one of Ireland's foremost Experts in Innovation and New Product and Service Development. Peter's PhD is in Innovation. His area of research is how firms organize for innovation. He is a Former Head of the Department of Design Innovation in Maynooth University. He is a Member of the Government's National Design Forum and has developed and run courses and workshops in Innovation for

Organizations in the public and private sector. He is on a number of Innovation Advisory Boards in business and the third sector. He has published in R&D Management, the Irish Journal of Management: International Journal of Innovation Management; London Strategy Review and regularly speaks at international conferences on the subject of Managing Creativity and Innovation.

GIOVANNI SCHIUMA - ARTS FOR BUSINESS INSTITUTE

Arts for Business Institute (www.artsbusinessinstitute.org/) is a private and independent nonprofit organization. It is committed to develop insightful research and to deliver inspiring and fruitful education services on the use of the arts in business. The Arts for Business Institute focused on the design, implementation, evaluation and review of Arts based Initiatives (ABIs) for the enhancement of the value creation capacity of private and public organizations. The Arts for Business Institute develops leading edge conceptual and action based research projects, design and implement executives training programs, promote and organize events.

Giovanni Schiuma (Male) is Chairman of the Arts for Business Institute and Director of the CLabUnibas (Centre for Entrepreneurship and Innovation Development) of the University of Basilicata. He is also the Director of the Master in Business Administration and Professor in Innovation Management. He is widely recognized as one of the world's leading experts in the Strategic Knowledge Management for company value creation dynamics, and arts-based management for organizational development and innovation, and chairs the International Forum of Knowledge Assets Dynamics, an international network for those interested in the role of knowledge and innovation for organizations value creation.

HANNA SZEMZŐ - METROPOLITAN RESEARCH INSTITUTE - MRI

Metropolitan Research Institute - MRI (www.mri.hu) was established in 1989, is an Internationally Recognized Independent Research, Planning and Consultancy Company based in Budapest, Hungary. In the core of the interest of MRI research is the Development and Performance of European Cities. The Institute participated for a long time in the planning of Budapest (concept for urban renewal and Strategic Development Concept of the city).

Hanna Szemző (Female) (PhD in History, Master's degree in Sociology and History) has been working for Metropolitan Research Institute for more than 15 years. She has extensive experience in Research and Consultancy in the fields of Urban Development, Social Inclusion, Energy Efficiency, Demography, Welfare, and Governance Analysis. She has participated in various 5th, 6th and 7th Framework Programmes of the European Union, prepared strategic development concepts for local governments, and has provided consultancy for Habitat for Humanity International in Armenia, and Bosnia and Herzegovina. Currently she coordinates the EU financed HomeLab project which connects employment and housing provision in five pilot sites in the Visegrad four countries.

CARLO MARIA TRAVAGLINI – EUROPEAN ASSOCIATION FOR URBAN HISTORY (EAUH)

The European Association for Urban History (www.eauh2018.ccmgs.it/) was established in 1989 with support from the European Union. Its goal is to provide a multidisciplinary forum for historians, geographers, sociologists, anthropologists, art and architectural historians, planners and other scholars working on various aspects of urban history from the middle ages until the present.

Carlo Maria Travaglini (Male) is Professor of Economic History (Competition Section:13 /C1) at the University of Roma Tre, Department of Business Studies, and holds courses in "History of Labor and Industrial Relations" at the School of Economics and Business Studies , "History of the city and the territory" and "Laboratory of Urban and Regional Analysis". Director of the University Center for the Study of Rome (CROMA) of the Roma Tre University; Director of the Master's Degree in Management-Promotion-Technological Innovations in the Management of Cultural Heritage, Department of Business Studies, Roma Tre University; Director of the biannual journal "Economic and social history research", with subtitle "Journal of Economic and Social History"; Director of the "Urban History Studies" series,

published by CROMA-Roma Tre University; President of the EAUH (European Association for Urban History).

AIDA VEŽIĆ - BALKAN MUSEUM NETWORK

Balkan Museum Network (www.bmuseums.net) was established in April 2006 at Museum Gustavianum in Uppsala, Sweden. The original network is facilitated by the Swedish based organisation Cultural Heritage without Borders. The participants were museum directors and key staff from eleven museums in the Western Balkans region (from Albania, Bosnia and Herzegovina, Kosovo, Macedonia, Montenegro and Serbia).

Aida Vežić (Female) is the Project Manager who works for CHwB since February 2012. Apart from Developing Museum Cooperation and Balkan Museum Network, Aida enjoys designing new projects (starting from log frame matrix). Research and resource finding are her favourite activities. Finished Faculty of Economics at the University of Sarajevo and Master Program "Cultural Projects for Development", organised by the University of Torino and International Labour Organisation.

EMINA VIŠNIĆ- RIJEKA 2020 - EUROPEAN CAPITAL OF CULTURE

Rijeka 2020 - European Capital of Culture (www.rijeka2020.eu/en/) RIJEKA 2020 Llc. was jointly founded by the City of Rijeka and the Primorje-Gorski Kotar County, for the purpose of implementing the Project of European Capital of Culture (ECoC) in Croatia in 2020. The company's goal is to independently, efficiently and transparently implement the Rijeka 2020 ECoC Project by implementing operational, program and communication strategies, while the ECoC infrastructural investments are managed by the City of Rijeka and the Primorje-Gorski Kotar County. Rijeka 2020 Llc. has rich experience in implementation of projects funded from local, national, EU and international sources such as Creative Europe, Europe for Citizens, EU Rights, Equality and Citizenship Program, Council of Europe, Central European Initiative, British Council, French Institute and EU Japan Fest.

Emina Višnić (Female) is the Chief Executive Officer of RIJEKA 2020. Her career has been marked by widely known words such as Urban Festival, MaMa - net.culture - club, Management of European Cultural Policies through Culture Action Europe. As the Head of RIJEKA 2020, her main goal is to organize a system that must work in a unified and efficient manner on all levels – cultural, artistic and educational programmes, communications and marketing, international cooperation, project financing.

4.1.d Relevant equipment

P1. Roma Tre University

Roma3 has established the RomaTre-Education as a non-profit foundation that aims to manage the technical, administrative and support services for the carrying out of education, training and professional development activities, particularly in e-learning mode and the production of editorial works - scientific and educational - in electronic format (E-press). The equipment provided by the Foundation will be used throughout the SoPHIA project for dissemination of the results and possibly for the development of online educational programs aimed at diversified audiences.

P2. Fundació Interarts per a la cooperació cultural internacional

An eXo Platform operating on a dedicated professional server with the following characteristics:

- o Processor: Intel Xeon E3-1270v3 @ 3.50GHz 4C 8T
- o Memory: 32GB RAM DDR3
- o Hard disk: 2 x 600GB SAS 15.000rpm -
- o Raid Hardware: Dell H310 Controller -
- o Raid configuration: Raid 1 - Min. 2 discs

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- Connectivity: 30TB of network traffic on 1Gbit port
- IPv4 addresses: 1 IPv4 address
- Network statistics: included
- Private LAN: 1 Gbit port
- Remote management: iDrac7 Enterprise
- Operating system: Linux Debian 8 64bit

P3. Stichting European Museum Academy – EMA

The European Museum Academy has since 2009 been visiting app. 70 museums in Europe per year to study and asses them as the museums has been nominated for different European museum awards. These visits are as a rule always visited by two EMA judges from two different countries and the EMA judges are selected from the EMA pool of experts. That pool consists of museum professionals or museum researchers from all over the continent. The judges provides reports from their visits and assessments and after a decade the Academy has an unique overview on the museum which are considered the best in Europe. We are happy that the different awards covers the museum field in a very broad way so that we have nominations of for example technical, natural, cultural, archaeological and open air museums.

EMA also collect annual national reports from our network of national representatives. These reports constitutes a valuable supplement to standard statistics from Eurostat, ICOM and national governments as they are written form within the sector and provide overview and insights to political, legislative and economic developments of importance to the museums in the country.

The infrastructure of EMA national representatives and the EMA pool of experts covers the European continent and provide professional knowledge and contacts in the wider museum field of all kinds of museums.

P4. EDUCULT - Denken und Handeln in Kultur Und Bildung

EDUCULT maintains an analogue and digital library with the relevant and contemporary literature on cultural policy research, participation in education and culture, arts education, culture and diversity, digitalisation in arts and culture, social science methods, etc.

For the different research steps, EDUCULT provides the necessary information technology. For easy access from each working station, it uses an own 1,6 TB data server which is backed-up regularly. It holds available the standard data analysis programmes for qualitative and quantitative analysis like SPSS and NVivo as well as online survey tools.

P5. National Technical University of Athens – NTUA

1. The Conservation Laboratory Library of the School of Architecture, NTUA,
2. Computer facilities and Digital equipment providing 3d data capture and high precision measurements of existing heritage buildings

P6. Dun Laoghaire Institute of Art Design and Technology – IADT

IADT have the infrastructural capacity to host one of the stakeholder workshops on our campus. We could also negotiate the use of our local authority cultural spaces in Dun Laoghaire Rathdown.

P7. Institut za Razvoj i Medunarodne Odnose - IRMO

The institutional support from the Institute for Development and International Relations (IRMO) includes working space and facilities, library assistance, Croatian Academic and Research Network (CARNet) internet access, and administrative support through the Project Support Centre.

4.2. Third parties involved in the project

No third parties involved

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Section 5: Ethics and Security

5.1 Ethics

The research to be undertaken is not expected to rise to ethical issues. A large part of the research will be based on published documents or data that is in the public domain. No personal data will be collected.

5.2 Security

Please indicate if your project will involve:

- activities or results raising security issues: NO
- 'EU-classified information' as background or results: NO

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