



ENCATC

The European network on cultural management and policy

2020

Congress Proceedings

Cultural management
and policy in a post-
digital world –
navigating
uncertainty

11th Annual ENCATC Education and Research Session November 9-10, 2020 Online

Cultural management and policy in a post-digital world –
navigating uncertainty

BOOK PROCEEDINGS



Co-funded by the
Creative Europe Programme
of the European Union

The European Commission support for the production of this publication does not constitute an endorsement of the contents which reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Editor

ENCATC

Edited by

Tanja Johansson, Sibelius Academy, University of the Arts Helsinki (Finland)

Scientific Committee

Members:

Elena Borin, Professor, Burgundy School of Business, France

Blanka Chladkova, Vice-Dean, Janáček Academy of Music and Performing Arts, Czech Republic

Roberta Comunian, Reader in Creative Economy, King's College London, United Kingdom

Terje Gaustad, Assistant Professor, Norwegian Business School, Norway

Toni-Matti Karjalainen, Professor of Arts Management, Sibelius Academy at the University of Arts Helsinki, Finland

Shu-shiun Ku, Assistant Professor, The Department of Cultural Creative Industries, National Pingtung University, Taiwan

Anna Mignosa, Lecturer, Erasmus University Rotterdam, Netherlands

Pavla Petrová, CEO, Arts & Theater Institute, Czech Republic

Carole Rosenstein, Associate Professor of Arts Management, George Mason University, United States

Alan Salzenstein, Professor/Director, Performing Arts Management and Arts Leadership, DePaul University, United States

Goran Tomka, Assistant Professor, Faculty of Sport and Tourism, TIMS, Serbia

Aleksandra Uzelac, Senior Research Associate, Institute for International Relations (IRMO), Croatia

Bjarki Valtýsson, Associate Professor, Department of Arts and Cultural Studies, University of Copenhagen, Denmark

COLOPHON

“Cultural management and policy in a post-digital world – navigating uncertainty.”

A compilation of papers presented in the framework of the 11th Annual ENCATC Education and Research Session and published by ENCATC.

Authors are responsible for the linguistic accuracy and readability of their peers. The editors of the publication are not responsible for linguistic errors or translations contained in the papers.

No part of this book may be reproduced in any form by print, photocopy, micro-film or any other means, without prior written permission from the publisher.

© All rights reserved with ENCATC

As a not-for-profit publisher, ENCATC relies heavily on the good relationships we have with our authors. We have a policy of acquiring a sole and exclusive license for all published content, rather than asking authors to transfer ownership of their copyright.

Rights retained by the Authors:

The right, after publication by ENCATC, to use all or part of the Article and abstract, for their own personal use, including their own classroom teaching purposes;

The right, after publication by ENCATC, to use all or part of the Article and abstract, in the preparation of derivative works, extension of the article into book-length or in other works, provided that a full acknowledgment is made to the original publication in the e-book;

For the uses specified here, please note that there is no need for you to apply for written permission from ENCATC in advance. Please go ahead with the use ensuring that a full acknowledgment is made to the original source of the material including the e-book name, volume, issue, page numbers, and year of publication, title of article and ENCATC.

The only exception to this is for the re-use of material for commercial purposes. Permission for this kind of re-use is required and can be obtained by contacting ENCATC.

Published by ENCATC

November 3, 2020

ENCATC
Avenue Maurice, 1
1050 Brussels
Belgium

info@encatc.org

www.encatc.org

Printed in Brussels.

D/2020/13.732/2

ISBN: 978-92-990088-2-9

Table of Contents

<i>The effects of the industrialisation of cultural events on the institutional context of festivals. An analysis by professional groups of four festivals.....</i>	6
Djelloul Arezki, Edina Soldo & Robert Fouchet	
<i>The Reggaeton of Cultural Policy: It is Latin America speaking! (and dancing)</i>	30
Marco Antonio Chávez-Aguayo	
<i>The Will to Give: Family Foundations, Legacy, Trust and Cultural Policy</i>	44
Angela Besana, Annamaria Esposito, Chiara Fisichella & Maria Cristina Vannini	
<i>In uncertain times. Confidence, Cohesion and Security. Donostia cultural policies for Covid-19</i>	60
Imanol Galdos Irazabal	
<i>Theatre memories in a digital realm: Cultural leadership and memory narratives.....</i>	79
Milena Dragičević Šešić & Milena Stefanović	
<i>Business model innovation through digitalization in cultural organizations: the case of MAXXI</i>	95
Pamela Palmi & Lorenzo Madaro	
<i>Ways of Engagement.....</i>	115
Emel Pilavcı & Emre Erbirer	
<i>Digital needs?: supporting arts festivals' transition to programming a blend of live and digital experiences</i>	129
David Teevan	
<i>Identity of independent cultural centres in Europe</i>	148
David Mírek	
<i>New Learning Design Models in the Age of Crises: Student Theatre Festival as a Digital Teaching Method.....</i>	169
Jovana Karaulić & Jelena Knežević	

<i>“Education without borders”: addressing online learning and inclusion through the lens of Museum Affinity Spaces (MAS).....</i>	<i>183</i>
Stefania Savva & Nicos Souleles	
<i>International cooperation for the digitization of cultural heritage: emerging models and the legacy of the lockdown.....</i>	<i>208</i>
Elena Borin, Federica Maietti & Luca Rossato	
<i>Cultural Equality in Museum Education: A Case Study of “Art For All”.....</i>	<i>225</i>
Hsieh Sih-Ying	
<i>Using Podcasts to Enhance Student Learning Inside & Outside the Classroom.....</i>	<i>240</i>
Xela Batchelder, Thomas Karr, Brett Ashley Crawford, Brenda Lee Johnston & Amy Shimshon-Santo	

The effects of the industrialisation of cultural events on the institutional context of festivals. An analysis by professional groups of four festivals

Djelloul Arezki

Aix-Marseille University, France

Djelloul.arezki@univ-amu.fr

Edina Soldo

Aix-Marseille University, France

Edina.soldo@univ-amu.fr

Robert Fouchet

Aix-Marseille University, France

Robert.fouchet@univ-amu.fr

ABSTRACT

This article presents the effects of the industrialisation of cultural events on the institutional context of festivals. By analysing the professional groups of four festivals at heterogeneous levels of scale, we identify a transformation of institutional logics. We also highlight a technical logic and show that mediation actions can play the role of border-crossers. Finally, we identify the effects of the expansion of festivals on the relations between professional groups.

Keywords:

Festival, Professional groups, institutional complexity

Introduction: Context and research issues

The cancellation of the major festivals in the summer of 2020 due to the Covid 19 health crisis has fallen like a knife on the performing arts sector, placing its organisations and their host territories in a state of emergency (Agrech, 2020)¹!

The "*crisis of the intermittent workers in the entertainment sector in 2003, which culminated in the cancellation of the Avignon Festival, a historic first since its creation in 1947*" (France Inter, 2017)², had already revealed the strong overlap between the economic and social problems of the regions and those of the cultural and events sector and its specific professional groups (Jameux, 2003; Alexandre *et al.*, 2005). Thus, while France has more than 3,000 festivals³ with a predominantly summer season, their massive cancellation, completed by the closure of all cultural facilities that receive audiences for several months, plunges the whole sector into an unprecedented crisis. Its direct, indirect and induced economic and social impacts are likely to strain the organisational capacities of cultural and creative players for several years and, in a chain reaction, of a number of players in related fields of activity (events, leisure, tourism, etc.) (Négrier, 2020)⁴.

This destabilising crisis is taking shape in an already very uncertain and tense cultural event environment (Getz & Page, 2016). These tensions have sources of a varied nature, artistic, economic, health, technological or societal. For example, festivals are part of a highly competitive market and are competing with a number of products and services that have a strong hedonic value (Chaney, 2008). We could also cite the reinforcement of security standards since the Bataclan attacks.

In this article we focus on the pluralistic nature of festivals, which is one of the major sources of organisational tensions. Festivals are organisations subject to a high degree of institutional complexity because they deal with different logics. This institutional context constitutes a threat to organisational stability (Charue-Duboc & Raulet-Croset, 2014).

However, if festivals are unstable objects, we paradoxically observe a phenomenon of growing in scale (Getz & Page, 2016). At a time when we are witnessing the festivalisation of territories (Négrier, 2014), which is akin to the industrialisation of cultural events (Mair, Whitford, 2013), festivals

¹ Agrech Vincent, 2020, "Towards a summer without festivals?" *Diapason, News - Headlines*, 19 April 2020, <https://www.diapasonmag.fr/a-la-une/vers-un-ete-sans-festivals-30081>

² <https://www.franceinter.fr/emissions/affaires-sensibles/affaires-sensibles-04-avril-2017>

³ <http://www.culture.gouv.fr/Thematiques/Culture-et-territoires/La-Culture-en-region/Panorama-des-festivals>

⁴ Négrier Emmanuel, 2020, Coronavirus: pour les festivals, " ce coup d'arrêt risquer d'avoir une incidence durable ", *Le Monde*, 15 April 2020, https://www.lemonde.fr/culture/article/2020/04/15/emmanuel-negrier-on-peut-s-attendre-a-des-rachats-de-festivals_6036642_3246.html

are constantly "growing". They are developing their portfolio of activities with *in* and *off times* (pre-festival, parallel activities), increasing their dissemination period, practising itinerancy or diversifying their activities, from dissemination to artistic creation? This desire to increase the scale of festivals is often accompanied by political incentives, as festivals have become an instrument of local cultural public action (Author 2, 2015).

Faced with these different observations, we propose to understand **how the expansion of festival organisations affects their institutional context**. In order to respond to this problem, we propose in the first part an analysis grid of the institutional context of festivals. On the basis of a review of the multidisciplinary literature on the different institutional logics of festivals, we use an analytical grid based on a sociological approach. We will show how the study of different professional groups helps to understand the institutional context of festivals.

The second part applies this grid in an empirical framework. On the basis of a comparative study of four festivals in the South of France, with different stages of scale, we will show that the increase in scale leads to a transformation of logics. Furthermore, we will highlight a technical logic and identify mediation activities as border-crossers between logics. Finally, we analyse the effect of scaling up on cooperation, compartmentalisation and conflicts between professional groups.

I. Professional groups as a grid for analysing the institutional logics of festival organisations: proposal of a theoretical and conceptual framework

This first part focuses on the presentation of the institutional context of festivals (1.) and on the professional groups that materialise the festival's institutional logics (2.).

1. Festivals, plural organisations with high institutional complexity. Panorama of festival institutional logics

Derived from neoinstitutional theory (Di Maggio & Powell, 1997), and in line with an environmental approach to organisations, institutional complexity refers to structures where multiple institutional logics coexist, which may be more or less antagonistic (Greenwood *et al.*, 2011; Malinovskyte *et al.*, 2016). These logics designate systems of codes, norms and values which will condition the action of the actors (Battilana & Dorado, 2010), in the image of religion (Maire & Liart, 2019). At the organisational level, the different worlds can cohabit serenely and cooperate in order to create a hybridisation of logics (Battilana & Dorado, 2010) or enter into conflict and threaten the durability of structures (Charue-Duboc & Raulet-Croset, 2014). It should be noted that these structures are also described as pluralist organisations (Denis *et al.*, 2001). They are based on "*des multiple objec-*

tives, diffuse places of power and knowledge-based work processes spécifiques". (Denis *et al.*, 2004), which can create conflict between different groups of organisational actors.

Festivals are the stage where several antagonistic logics coexist. These logics come from two sources: their field of activity and their legal status. As a result of their insertion in the arts, culture and creation sector and more generally in the creative industries, festival organisations see two competing logics coexisting: art and management (Chiapello, 1998). One effect of this pluralism is the presence of organisational tensions (Abdallah, 2007), or a two-headed leadership. Thus, it is common to find a strategic duo with an administrator in charge of managerial logic and an artistic director (Reid & Auger, 2014; De Vogt, 2006).

While arts, cultural and creative organisations are able to adopt and adapt managerial practices (Aubouin *et al.*, 2012), they still find it difficult to transpose traditional management tools. The causes of these difficulties are multiple: the dissonance between the values of the managerial and artistic worlds, the fear of normalising the creative process or the fear of evaluating artistic production (Chiapello, 1998 ; Menger, 2002 ; Benghozi, 2006; Aubouin *et al.*, 2012). These managerial practices can then be perceived as hindering the creation and dissemination missions of festivals.

The second source of pluralism comes from the legal status of festivals. Adopting mostly associative status (Vauclare, 2009; Ministry of Culture, 2017)⁵, festivals integrate a social logic. This is materialised externally, through the mediation activities that these structures can carry out (Vergès, 2018), but also internally through the modes of governance and the role of voluntary work (Getz & Page, 2016).

The associative structures tend to become more professional by introducing a managerial logic in order to respond to external pressures, such as injunctions from public financiers, but also to internal pressures such as the quest for efficiency (Clergeau & Dussuet, 2014). We will tend to say "managerialise", because a festival may already be considered professional in terms of its artistic discipline, and therefore in terms of its artistic logic. This managerialisation is illustrated by a more advanced use of management tools, a phenomenon of salarisation in order to ensure the development of the association (Dussuet & Flahaut, 2010) and, following the example of two-headed leadership, it calls for two-headed governance (Chanut-Guieu, 2009).

However, these two logics (social and managerial) can be perceived as antagonistic and generate conflicts between the different actors in the organisation (Pache *et al.*, 2019). In fact, the more an

⁵ For example, in the field of contemporary music "*seven out of ten festivals are organised by associations*" (Ministry of Culture - DEPS, 2017).

organisation becomes managerialised, the more it tends to be more inclined to adopt an economic discourse. This favours the disengagement of volunteers and their intention to leave the organisation, as there is a conflict of values between the disinterested commitment of the volunteer and the logic of economic performance (Ospital & Templar, 2018).

This neo-institutional reading of festival organisations identifies three antagonistic logics: managerial logic *versus* artistic logic (approach by the activity sector) and managerial logic *versus* social logic (approach by legal status). This institutional context leads to different perceptions of the organisation, its objectives and its missions. We propose to analyse this institutional context in the light of the perceptions of the actors who are members of the different professional groups.

2. Professional groups as a framework for analysing festival institutional logics

The sociology of professions was born in the United States. Its aim is to study a specific group of workers: professionals. The latter come under a specific legal regime and "*membres are provided with specific rights, such as constituting an autonomous and recognised association, prohibiting the exercise of the activity by those who are not members, organising the formation*". (Dubar *et al.*, 2015), as do doctors, lawyers, and teacher-researchers. The sociology of the professions then distinguishes between professions and occupations, which represent other activities, and which can be translated as trades or jobs. This is the functionalist approach to the professions.

In this approach, the profession is characterised by six attributes:

- "« 1. *The professions deal with intellectual operations associated with great individual responsibility.*
2. *Their basic materials are drawn from science and theoretical knowledge.*
3. *with practical applications and utiles;*
4. *and are transmitted through formal education.*
5. *Professions tend to self-organise in associations;*
6. *and their members have a motivation altruiste*". (Dubar *et al.* 2005, citing Flexner, 1915).

In reality, there is no consensus on what is professional and what is not, as professions evolve and are contextualized (Dubar *et al.*, 2005). Another source of the lack of consensus lies in the different meanings of the term profession. The profession can refer to a "*vocation professionnelle affirmée*". (Dubar *et al.*, 2005) based on a strong ideology similar to that of religious orders. It can also refer to a "*classification professionnelle*". (Dubar *et al.*, 2005), i.e. the work done, the job held by an in-

dividual. It can refer to a "*groupe professionnel*". (Dubar *et al.*, 2005), i.e. an "*ensemble persons referred to (and referring to each other) by the same trade name in the broadest sense of the term semblables*". (Dubar *et al.*, 2005). Finally, the profession can refer to a "*fonction, a competence reconnue*". (Dubar *et al.*, 2005).

Also noteworthy is the emergence of the interactionist approach, which explains the existence of different professional groups. Some are quasi or semi-professions, as they do not possess all six attributes of the profession and are in the process of professionalisation, such as carers or nurses (Dubar *et al.*, 2005).

Furthermore, it seems important to explain that professionals enjoy a certain degree of autonomy due to their high level of expertise. Thus, the evaluation of the professional is carried out within his or her professional community of reference. In France, for example, university teacher-researchers enter the profession via an initiation rite (the thesis and its defence) and will be evaluated by other teacher-researchers via the National Council of Universities during the main stages of their career, as is the case with their qualification as lecturers.

Thus, professional logic and organisational logic can be antinomic. Indeed, different paradoxes emerge between these two logics: collegiality of the profession *versus organisational* bureaucracy; professional autonomy *versus organisational* control; professional commitment *versus organisational* commitment, and the like (Lelebina, 2014).

We make a link between this sociological approach and the neo-institutional reading of festivals, because different logics can explain the existence of different groups of actors and vice versa (Château-Terrisse, 2012). It can also illustrate the tensions between logics.

Our analysis of the literature reveals four professional groups in festivals. Two groups are linked to legal status (intermittent performers and volunteers) and the other two groups are linked to the profession (event management and cultural mediation).

The intermittent worker in the performing arts, generally assimilated to the artistic logic, is considered as a professional via the obtaining of a specific unemployment insurance scheme (Dubar *et al.*, 2005); however, sociological research has mainly focused on the artistic figure and has not analysed workers and technicians. Literature then uses the terms "*artistic professions*" or "*cultural professions*" (Gouyon & Patureau, 2014). However, workers and technicians represent a significant proportion of the intermittent workers in the performing arts. Thus, in 2011, of the 166,000

people in performing arts occupations, 103,400 are technicians, while artists represent 62,600 people (Gouyon & Patureau, 2014). This failure to take technicians into account is more surprising given that, initially, in 1936, the intermittent nature of the system concerned only film technicians and managers (Benhamou, 2014). This profession is a perfect illustration of the changing and dynamic nature of the professions: sometimes decried or even stigmatised (Tijou, 2003) and constantly mobilised to protect their rights (Lechaux, 2009). Thus, intermittent workers in the performing arts represent the archetypal professional from an extra-organisational perspective: they belong to a professional group that reflects the traditional dichotomy between profession and organisation.

Volunteers are the second professional group. They participate freely and without remuneration in the activities of the associations. As such, they donate their time and skills to festivals. Although they are not considered a professional group in their own right (Ferrand-Bechmann, 2008), they are nonetheless an important resource for festivals (Bladen *et al.*, 2012; Godblatt, 2014).

Mediators represent the third occupational group. They do "*profession of democratisation culturelle*". (Peyrin, 2005), have a strong professional identity (Peyrin, 2005) and are dedicated to "*favoriser the collective appropriation of different art forms and patrimoine*". (Aubouin *et al.*, 2010). Nevertheless, "*si mediation activities are the subject of a broad consensus, they remain today weakly inserted within cultural organisations and institutions and they are generally carried out by professional actors with precarious employment conditions, statutes and forms of recognition incertaines*". (Aubouin *et al.*, 2010).

Finally, event managers and their teams correspond to the last professional group. We would tend to describe them more as quasi-professionals, as the authors only mention two main characteristics: the high level of expertise required to run an event and the creation of a common knowledge base (Bladen *et al.*, 2012; Godblatt, 2014). Furthermore, they are closer to organisational expertise (Lelebina, 2014).

II. Empirical Study of the Effects of Scaling Up on the Institutional Context of Four Festivals

This second part focuses on empirical research. After a presentation of the methodological parameters of the study (1.), we present the cases studied and their level of scope (2.). The presentation of the results continues with the analysis of the effects of the level of scope on each of the logics and on the relations between the groups (3). Finally, we discuss the results with the aim of identifying the contributions of the research (4.).

1. Methodological parameters of the empirical study

This article is based on the results of a doctoral research (2015-2019), one of whose research proposals aimed to understand the institutional context of four festivals.

Research strategy

The research strategy is based on a case study because of its strong power to contextualise and understand organisational phenomena (Yin, 2018). By conducting a multiple study, its validity is strengthened (Yin, 2018). The results are based on an intra-case and inter-case analysis and make it possible to identify consonances and dissonances between festivals.

The choice of cases is based on criteria of scientificity (Yin, 2018) that are homogeneous, such as legal status, and heterogeneous, such as artistic discipline or age of the structure.

Data collection

For the sake of triangulation and validity (Jonsen, Jehn, 2009), three sources of evidence were mobilised. Internal and external secondary data (n=39) to present the cases, non-participating direct observations (n=22) to observe the behaviour of the different professional groups and semi-directive interviews to collect the perceptions of the actors (n=77).

Data analysis

We carry out a thematic content analysis (Paillé, Mucchielli, 2012). The thematisation is based on the construction of a coding grid assisted by the Nvivo12 software. The latter was constructed on the basis of a *priosteriori* coding (Allard-Poesi, 2003). Thus, the coding grid is semi-structured, containing themes constructed *a priori* from our theoretical and conceptual framework (e.g. artistic logic) and themes constructed *a posteriori* from the empirie (e.g. technical logic).

Table 1. Presentation of collected data

Data	Features	Case A	Case B	Case C	Case D
------	----------	--------	--------	--------	--------

Data	Features	Case A	Case B	Case C	Case D
Semi-directive interviews	Average length of interviews	47 minutes 07	50 minutes 37	55 minutes 26	52 minutes 15
	Total interviews	16	14	17	30
	Breakdown Women/Men	7 women 9 men	6 women 8 men	15 women 2 men	21 women 9 men
	Breakdown by organisational stratum	6 top managers 3 middle managers 7 operational core	3 top managers 4 middle managers 7 operational core	2 top managers 4 middle managers 11 operational core	2 top managers 9 middle managers 19 operational core
	Time distribution	8 permanent staff 8 temporary	3 permanent staff 11 temporary	7 permanent staff 10 temporary	12 permanent staff 18 temporary
	Breakdown of legal status	3 PERMANENT CONTRACTS 1 intermittent of the show 12 volunteers	3 PERMANENT CONTRACTS 4 intermittents of the show 1 CDD 3 trainees 3 volunteers	7 PERMANENT CONTRACTS 2 intermittents of the show 4 CDD 4 trainees	12 PERMANENT CONTRACTS 5 intermittents of the show 11 CDD 2 trainees
	Disparity in seniority	From 1 edition to 30 years	From 1 edition to 20 years	From 1 edition to 10 years	From 1 edition to 21 years old
	Visual/ Telephone	8 visuals 8 telephone	10 visuals 4 telephone	12 visuals 5 telephone	27 visuals 3 telephone
Average age	52 years old	30 years old	37 years old	37 years old	
Secondary data	Inter-case data	Website of the three communes, the department, the region and MP 2018			
	In-case data	Festival website, Local press, Twitter, Linkedin and Facebook accounts	Festival site, local, national, international and specialised press Twitter, Linkedin and Facebook accounts	Festival website, Local, national and specialised press Twitter, Linkedin and Facebook accounts, Festival site, Organizational chart.	Site France festival Local, national, international and specialised press Website of the Ministry of Culture Twitter, Linkedin and facebook accounts, Welcome booklet,

					Organizational chart, Strategic plan.
Direct non-participating observations	Number of observations	4	4	6	12
	Type of observations	Floating observations, press conferences, observations of work teams in the assembly and dismantling of events			

Source: Authors

1. Methodological parameters of the empirical study

Festivals at different stages of scale

The following table presents different characteristics of the festivals that allow them to be classified at different levels of scale.

Table 2. Presentation of festivals

	Case A	Case B	Case C	Case D
Artistic discipline	Contemporary music - Jazz	Contemporary music - Rap and electronic music	Dance	Lyric Arts
Budget	560 000 euros	2.5 million euros	2 million euros	22.4 million euros
Metropolitan territory	Metropolis of Aix-Marseille Provence			
Municipal territory of implantation	Rural community	Urban municipality A		Urban municipality B
Roaming	Absence	Low	Forte	Extreme
Age	21 years old	20 years old	21 years old	70 years old
Broadcasting time	3 days		3 weeks	2 months
Legal status	Association			
Envergure	Low	High	Forte	Extreme

Source: Authors

We have varied the artistic themes by taking into account the artistic discipline of the festivals. Two cases base their offer on current music (one jazz, one rap and electronic music), one on dance and one on lyrical arts. According to the panorama of festivals of the Ministry of Culture, which lists festivals in France (n=3072⁶, contemporary music festivals represent the largest number of festivals in France (n=1667), while classical music, which includes the lyric arts (n=203) and dance (n=47), represents a smaller number of festivals. Thus, we have a diversity of artistic practices and a representativeness of festival types.

As far as the territory is concerned, we have tried to combine scientific and logistical aspects. We have selected festivals from the same metropolitan territory: the metropolis of Aix-Marseille-Provence. Thus, the festivals are anchored in the same metropolitan territory and are members of its portfolio of cultural events (they all participate in Marseille Provence 2018, which celebrates the 5 years of Marseille Provence as European Capital of Culture). It should be noted, and still accord-

⁶<http://www.culture.gouv.fr/Thematiques/Culture-et-territoires/La-Culture-en-region/Panorama-des-festivals>

ing to the panorama of festivals, that the Bouches-du-Rhône represents the second territory where the festival offer is the most important after the department of Paris (126 for the 13 and 186 for the 75). Even if the metropolitan, regional and departmental territory is the same for the four festivals studied, the municipal territories are heterogeneous. Two festivals take place in the same urban city, one in another urban municipality and the last one in a rural area. Thus, at the municipal level, these festivals are members of three different territorial portfolios of cultural events.

As far as temporal characteristics are concerned, we have also taken care to have festivals of different ages in order to vary the different stages of sustainability. Thus, the lifespan of the festivals studied ranges from 20 to 70 years. We have also varied the duration of the festival's diffusion (from three days to two months).

We have selected festivals that have the status of an association inasmuch as, as we have seen in the literature, this is the status mostly adopted by these organisations. Thus, this choice of cases is relevant because it brings together heterogeneous and homogeneous factors, allowing us to analyse different organisational contexts.

What about the levels of scale?

Festival A has the lowest level of scale as it has a relatively smaller budget and reduced time and space for dissemination. Festival B has a higher level of scale, a larger budget (difference of 2 million euros) and two venues. While festival C has a lower budget than festival B, it is larger in scale. Indeed, the festival lasts longer and practices local roaming. As such, if the festival's offices and ticketing are in two separate premises, it should also be noted that the festival invests eighteen diffusion spaces throughout the city. Finally, festival D has the highest level of scale. It is the oldest, organises international tours of its productions, runs for two months, and has the largest budget.

This characterisation is corroborated by the media scope of the festivals. Using a search on the Factiva database and Google News, we find that festivals are not cited by the same type of press. For example, while festival A is only mentioned in the local press, festival D is mentioned in the local, national, international and specialised press.

2. The scale of festivals as a factor in transforming the institutional logics of festivals: between management, social, artistic and technical aspects.

We propose to analyse the effect of the different stages of scope on each of the logics and we highlight a technical logic.

2.1 "Growing and becoming managerial": an increase in scale that reinforces managerial logic

The managerial logic is expressed in all cases. More specifically, we identify a progression of the stages of managerialisation according to the scale of the festival. Thus, managerialization is at an embryonic stage in case A because it represents only an intention.

"It's an association in development, in ambition, that's the word I was looking for, which is ambitious. [...] We feel that in order for it to continue, because it's difficult, we know it's going to be more and more difficult, and for that we have to innovate, have a few ideas, try to dig deeper, and I think that patronage in my opinion is essential" (Volunteer-administrator - case A).

Festivals B and C are in the process of being managed. As such, festival B is equipped with a scheduling management software to manage temporary staff and festival C has just completed its first organisation chart. Case D is at maturité; it is self-financing (60.3% of its budget) and has a bureaucratic operation with two strategic committees, six directorates and twenty-seven departments. Managerialisation also materialises in organisational artefacts. For example, Festival D has created a strategic governance document that explains the roles of each directorate and committee in strategy formulation and implementation. The structure is also equipping itself with HR tools such as the organisation chart, the trombinoscope, the mapping of trades and has carried out an HR audit to improve working conditions.

As stated in the literature, salarization accompanies managerialization. If there are only three people on permanent contracts in cases A and B, cases C and D have more (all top and middle managers). This managerialisation is also reflected in the semantics used by the respondents. Indeed, only the respondents in case D use the word "company", not "association", to refer to the festival organisation.

"I discovered in this company the interest of being accompanied by experts when I thought we were always on our own..." (Administrative and financial director and co-director of the artistic direction - case D)

Finally, it should be noted that the more the case is managed, the more it tends to recruit fixed-term and permanent contracts, with the culmination of case D. Indeed, it has staff on "annual" fixed-term contracts, with some festival members accumulating long fixed-term contracts with periods of shortage.

"Two thirds of the staff are on fixed-term contracts and come back every year and do permanent contracts in disguise" (Production Attaché - case D).

2.2 "Getting bigger, getting rid of volunteers and strengthening mediation actions": a major step forward that transforms social logic

We observe a transformation of the social logic in festivals. If, as we have seen previously, the increase in scale leads to salaried employment, it also generates a significant drop in the number of volunteers. Indeed, while cases A and B make greater use of volunteers, cases C and D do not use this resource, as the contractual freedom of the volunteer is perceived as a constraint on the activity.

While for case A the associative logic is materialised by the presence of volunteers (61) with a strategic role, it is more moderate for case B. Indeed, they are more numerous (350), but have a more operational role.

"For years, from the very beginning, it was the volunteers who ran the shop, both administratively and financially, but also artistically and also in terms of investment of material tasks. And that's still going on, [...] the board of directors, where they are quite numerous and very invested, was enough to run the shop for the concerts" (Volunteer/Administrator - case A).

For cases C and D, we observe a transformation of the social logic. Indeed, the office and the board of directors are not mentioned by any respondent. This is materialised by the presence of mediation services and public relations (services and professional groups absent in cases C and D).

2.3 "Growing and creating": an expansion that reinforces artistic logic

The artistic logic is represented more in cases C and D, as they integrate a creative activity. It is illustrated by the presence of artistic directors on permanent contracts, services dedicated to this logic and by creative activities.

"Here we have a playwright, I don't know if you've met her [...] we see her more as an artistic advisor." (Administrative officer - case C)

This integration of the artistic logic is also reflected in the significant funding allocated to creation.

"I am very attached to this festival because it is one of the rare festivals where there are the means to make a quality creation [...] it is not the same as opera houses that have 70% of their structure and 30% of artistic, to have a reverse system as we have, 70% for the artistic and 30% for the structural costs" (Director General - case D).

Cases A and B are only diffusion spaces. Thus, the logic of artistic creation is not evoked in case A and is outsourced to an operator, Live Nation, in case B.

"They (the artists) are not part of the human resources of the festival because we never deal with the artists live. We deal with the artists' agents. The artists themselves, we're not really connected to them at all. We listen to their work in order to select them, but in fact we have very little interaction with the artists themselves" (Director - case B).

2.4 "Growing and having technical competence": highlighting a technical logic

A technical logic emerges from the analysis of the data. It is based on the existence of a professional group, which we call "technicians", representing a specific and heterogeneous body of trades whose expertise is based mainly on experience.

"Ah yes, it's strange because in fact it's like when there were the strikes of the intermittent workers, or at least the intermittent workers who threatened to go on strike, it's that suddenly we said to ourselves "ah but there are people who work to make shows, it's not only the artists, who are these people, what do they do? When I say that I am a stage manager, people ask me what I do. And when you're "machino, electro or sound engineer", people also ask what the work consists of. That's what it's all about. So that's the ambivalence of our professions, people don't know our professions, because they are particular professions and like all particular professions they are not known by the general public because some professions don't need studies to reach a certain technicality. There are a lot of trades that can be learned on the job, although electricity, sound engineers, machinists, you still need a little advanced technical training, but if you don't have a general manager's school, once you understand how all the positions work and with seniority, you can very well become a general manager without going to a general manager's school, it doesn't exist" (Production Attaché - case D).

Technicians and technical logic are often perceived as separate, both members of the organisation but at the same time quite independent.

"The technicians are still a family of people who often work together, a network of people who know each other very well and who get together from event to event [...] they're there for very little time, they're often big people, big teams and there's a particular atmosphere which is that of the technique which is maybe a little bit different... They work a lot, a lot on very intense and very reduced rhythms so I think it's still a way of working which is different and yeah, I think we can talk about a technical category" (Partnerships Officer - case B).

The president of festival A mentions three reasons that reinforce this logic. Firstly, the expectations of the public, which are evolving towards a stronger demand for the technical conditions surrounding artistic production.

"Today, professionalism means that we have, that we see things that are totally accomplished and irreproachable. That is to say the perfect sound, if it's music, a perfect staging with tricks etc., if it's theatre idem et compagne. And whether it's hyper licked, hyper everything, what we call professionalism. So the technique became totally important and then, but it's not the technician's fault, it's the desires of the audience and the inevitable march of the thing, of the show. ».

Secondly, the development of specific and increasingly specialised technical expertise.

"It supposes that there are, I would like to say, engineers of all kinds, that we have a technician in all proportion, without all the technical zoning there are people who know how to think it: how do you transform a lawn area into a bar? Et cetera with everything is safe. If they start at the festival on Tuesday morning, you don't have the same thing in the park as when the park is on Friday".

Finally, increasingly drastic security injunctions support the development of this technical logic.

"The notion of security is becoming more and more brilliant.

The technical logic identified asserts and strengthens itself as the festival grows in scale. In fact, while in case A, the technical logic is embodied in the use of a single intermittent worker and logistics service providers, in case D, it materialises within a permanent management with a top manager and intermediate managers on permanent contracts, as well as in the use of a large number of intermittent workers.

It should be noted, however, that while the majority of technicians are hired on intermittent fixed-term contracts, not all of the intermittent workers in the show are necessarily technicians. In addition to the artists, some of them hold administrative positions, such as the Case-A intermittent worker in Case A who is in charge of partnerships.

3. "We work together, we work separately and we argue": an intensification of conflicts between professional groups depending on the size of the festival.

The cohabitation of the identified institutional logics results in modes of relationship between professional groups that vary greatly from one festival to another. However, there is a real tendency for compartmentalisation and conflicts between professional groups to intensify as the festival grows in size.

First of all, in the various cases studied, we note the existence of a form of compartmentalisation and differentiation between professional groups. This compartmentalisation may result from the fact that professionals belong to trade families or their legal status of employment.

"It's a compartmentalisation that is in fact informal, but it's there, in the world that creates it, (...) because we don't do the same job at all. We're still 80% on our computers. The technicians are 80% of the time with things to set up, physical things, wearing Fly Cases. The artists are 80% of their time for dancers to move their bodies, for singers to sing. So we don't have the same job, so we don't mix in the same way between these worlds". (Administrative officer - case C)

"There are barriers between permanent and fixed-term contracts, intermittent workers, for example" (Director General - case D).

Nevertheless, we identify logics of cooperation in cases A and B.

"Everybody puts their hand to the paw ... it welds a little, it weaves links and each pole knows who is not devalued that he is not ... because there is a hierarchical question, a little bit of intermittent permanent trainees and next to that, there is also each pole which is individual, but they all work hand in hand, whether it is the reception of artists, the com', the partnerships, the accreditations, the administration and therefore it also has, this unifying side I'm going to say, to link each sub-part together a little and to show that we are all one big team and that we are all here to join hands." (Partnership officer - case B).

While low levels of scale allow for logics of cooperation between worlds, high levels favour the emergence of conflicts between groups.

"It's I find... we'll say old habits that are nourished on both sides, because in the same way we say that technique is overlooked in the reflection around all cultural organisations, but the technicians also feel a bit sidelined and above all they have a kind of... they are sometimes a bit contemptuous with production and administration. ...] two worlds that are always in conflict and lacking in mutual respect. [...] We have a party at the end of the festival where we all get together, we eat Yassa chicken and drink rum, but there are the technicians at one table and all the girls from the office at another" (Audience Relations Officer - case C).

Finally, the logic of cooperation is little mentioned in cases C and D. Nevertheless, the respondents' discourse at these two festivals allows us to identify relations with the public and mediation actions as being at the interface of technique, art, management and social issues.

"Relations with the public is part of the administration in a certain way, but at the same time we are very much linked to the technique, because there are things that we have to organise in terms of welcoming the public. We are linked to the artistic, because we also organise times of meetings, of physical contact with artists and people. It's more, as the boss would say, it's more a kind of constellation" (Audience Relations Manager - case C).

"Yes, there is still an administration part, a computer part, and a budget monitoring part, that's for sure. But there is really a part where you are involved in another way, where you have to create cultural actions, imagine [...]. So there is a part of creation that is artistic" (Public relations officer - case C).

4. Discussion of the results

The discussion of the results is intended to address the issues raised in this article. To do so, we look back at the theoretical and conceptual framework in order to explain the results and identify the contributions of the research.

4.1. A reading of the festival's institutional logic by professional groups

In this study, we associate the institutional festival logics with the professional groups that make up the festival. The reading of the logics by the groups makes it possible to better understand them, insofar as these groups contribute to the materialisation of the logics. More particularly, we propose a reading of these logics and groups according to the scale of the festivals, thus allowing us

to decipher the effects of the scale up on the institutional context of a field of activities in the process of industrialisation.

In doing so, our study shows how the three initial institutional logics are transformed when a festival grows in size. Thus, the managerial logic is analysed in terms of the degree of managerialisation of the structures. The more a festival increases its scale, the more it integrates management practices and tools. This result corroborates the work on the management of associations, which explains that the larger an association increases in size, the more its managerial logic becomes imperative (Ospital, Templar, 2018). The aim is then to redistribute power within the organisation, with salaried teams taking more power at the expense of volunteers, in order to keep only volunteer members in the association's office, as appears to be the case in cases C and D.

Our study also shows that the more management becomes established in the organisation, the more its social logic is transformed, gradually shifting from an associative to an entrepreneurial logic. At the same time, the social logic based essentially on voluntary work is disappearing, giving way to a social logic oriented towards professional mediation activities.

Artistic logic is expressed both in the activities of the organisation and in the professional groups that make it up. For example, a festival may carry out only a dissemination activity or integrate artistic creation activities in order to increase its scope. Moreover, the integration of a professional artistic direction also reveals a growing scale.

4.2. The figure of the artist and the craftsman to understand the distinction between artistic and technical logic

If the initial theoretical and conceptual framework allowed us to distinguish three logics (management, social and art), our research has led to the emergence of a technical logic, specific to festival organisations. Respondents not only distinguish technicians from artists, but also differentiate them from the rest of the organization. Thus, the technical is a professional group in its own right that meets its own standards and codes. The study also shows that as a festival grows in size, the technical logic becomes more important. Indeed, it can become an internalised service, in the case of extreme scale; if in cases A, B, C, the technical logic only includes personnel hired on an intermittent basis, in case D, we find personnel on permanent contracts for the functions of technical intermediate managers.

How can we explain the distinction between technicians and artists when the regime of intermittence groups them together? One of the possible avenues of response can be found in the sources

of definition of art proposed by Evrard and Colbert (2010), which distinguish between artist and craftsman. The authors identify three sources of definition of art. The first is based on the classical perspective of art where art "*identifies with beauty*" (Evrard, Colbert, 2000). Art is based on an imitation of nature by the artist, but can also refer to the beauty of technical mastery, thus including craftsmen. The other two perspectives differ from the classical perspective by integrating the subjectivity of the artist or that of the consumer. The second perspective is based on a **distinction between the artist and the craftsman, and** goes beyond the imitability of nature by focusing on the interpretation, representation and subjectivity of the artist vis-à-vis the world. The third conception of art marks a break with the previous definitions because it includes the consumer. Here, the beauty of the work is no longer based solely on the judgement of the artist and his peers, but takes into account the consumer's perception. According to this perspective, art is defined in the relationship and interaction between the work and the consumer, what Genette (1997) calls the aesthetic relationship.

If initially the artistic act could integrate technical mastery (by integrating craftsmen), the evolution of the definition of art tends to distinguish between artists and craftsmen and, in doing so, to increase the levels of technicality expected by consumers in both fields. This amounts to specialising both the artistic and the technical act, and encouraging the emergence of distinct professional groups.

4.3. Mediation actions, border-crossers that can overcome the limits of festival industrialisation

The analysis of the cases shows that the scale of an event can negatively affect relations between different professional groups. Although the compartmentalisation of professional worlds can be observed within all the festivals studied, the logic of cooperation, or conversely the conflicts, decreases or increases according to the scale of the event. The larger the scale of the event, the more conflicts and a decrease in cooperation between groups can be observed.

This observation calls for a certain vigilance with regard to the festival's expansion. The organisations will have to manage the many tensions that arise from this as well as the possible contradictions between institutional logics induced by the festivities. They must not forget their *raison d'être*, nor the purpose of the cultural and artistic project they are carrying out, in particular for the benefit of the development of activities.

Moreover, involving the various professional groups in the development of mediation or public relations actions seems to be a way of reducing conflicts. The empirical study has indeed shown that

the "mediator" group can cross the boundaries between logics, because mediation actions combine elements from the worlds of art, management and technique, while pursuing a social purpose. When festival mediators wish to carry out an action of cultural democratisation, this action is budgeted, has an artistic content, mobilises technical tools... In this sense, we qualify this group as a hybrid because it is at the crossroads of several logics (Battilana & Lee, 2014).

Conclusion: the limits and avenues of research

The objective of this research was to understand how the expansion of festivals could impact their institutional context. By analysing the different professional groups present within four festivals, we illustrate and enrich the literature on festival institutional logics and identify some of the effects of industrialisation on the institutional context of festivals.

Another methodological protocol can provide richer results. This would be a longitudinal case study of a festival. As such, we could study the evolution of the institutional context of the festival during its development. If this protocol does not resolve the external validity bias, it would allow us to understand more finely the effects of the scale-up on the festival institutional context.

Finally, there is the question of transferring these results to other organisations in the creative industries. This transferability would make it possible to ensure, in particular, a possible statistical generalisation.

REFERENCES

- Abdallah C. (2007). "Production et appropriation du discours stratégique dans une organisation artistique", *Revue française de gestion*, vol. 33, n°174, 61-76.
- Alexander I. A., Latarjet B., & De Saint Pulgent M. (2005). "Intermittents du spectacle: une spécificité française en question", *Le Debat*, n°2, 105-114.
- Allard-Poesi F. (2003). "Coding the data". In Giordano Y. Conducting a research project. Une perspective qualitative, EMS Editions, Colombelles, 245-290.
- Aubouin N., Koblenz E., Kletz F. (2012). "Les outils de gestion dans les organisations culturelles: de la critique artiste au management de la création", *Management & Avenir*, vol 4, n°54, 191-214.
- Aubouin N., Kletz F., Lenay O. (2010). "Médiation culturelle : l'enjeu de la gestion des ressources humaines", *Culture études*, vol 1, n°1, 1-12.
- Battilana J., Dorado S. (2010). "Building sustainable hybrid organizations: The case of commercial microfinance organizations", *Academy of management Journal*, Vol 53, n°6, 1419-1440.
- Battilana J., Lee, M. (2014). "Advancing research on hybrid organizing-Insights from the study of social enterprises", *The Academy of Management Annals*, vol 8, n°1, 397-441.
- Benghozi P.J. (2006). "La gestion de projet dans le secteur culturel", *Hermès*, n°46, 71-78.

- Benhamou F. (2014). "Le conflit sans fin des intermittents", *Esprit*, vol juillet, n°7, 113-115.
- Bladen, C., Kennell, J., Abson, E., Wilde N. (2012). *Events Management - An Introduction*. Routledge, Abingdon.
- Chaney D. (2008). Dyadic approach to cognitive convergence between managers and consumers as an antecedent of consumer loyalty in the cultural sector: comparison of a private and a subsidised festival, PhD thesis in Management Sciences, University of Burgundy.
- Chanut-Guieu C. (2009). "La professionnalisation de la fonction de bénévole: quand l'Etat impulse le changement", *Management & Avenir*, vol 27, n°7, 13-30.
- Charue-Duboc F., Raulet-Croset N. (2014). "Confrontation de logiques institutionnelles et dynamique des routines organisationnelles", *Revue française de gestion*, vol 40, n°240, 29-44.
- Château-Terrisse C. (2012). "The management system of hybrid organisations, regulator of heterogeneous institutional logics? Le cas du capital-risque solidaire ", *Management & Avenir*, vol 54, n°4, 145-167.
- Chiapello E. (1998). *Artistes versus managers: Le management culturel face à la critique artiste*, Editions Métailié, Paris.
- Clergeau C., Dussuet A. (2004). "Les entreprises sociales en quête de professionnalisation: L'exercice difficile des associations d'aide à domicile aux personnes âgées", *Revue internationale de l'économie sociale: Recma*, n°294, 39-53.
- De Voogt A. (2006). "Dual leadership as a problem-solving tool in arts organizations", *International Journal of Arts Management*, vol 9, n°1, 17-22.
- Dimaggio P.J., Powell W.W. (1997). "Le néo-institutionnalisme dans l'analyse des organisations", *Politix. Revue des sciences sociales du politique*, Vol 10, n°40, 113-154.
- Dubar C., Tripier P., Boussard V. (2015). *Sociologie des professions*, Armand Colin, Paris.
- Dussuet A., Flahault E. (2010). "Entre professionnalisation et salarisation, quelle reconnaissance du travail dans le monde associatif". *Formation employ*, vol 111, n°3, 35-50.
- Evrard Y., Colbert F. (2000). "Arts management: a new discipline entering the millennium?", *International Journal of Arts Management*, vol 2, n°2, 4-13.
- Ferrand-Bechmann D. (2008). "L'enjeu bénévole, regard sur une démarche éthique", *Éthique & Santé*, vol 5, n°1, 21-25.
- Flexner A. (1915). "Is social work a profession ? ", *School and Society*, vol 11, n°2, 152-165.
- Getz D., Page S. (2016). *Event studies: Theory, research and policy for planned events*, Routledge, Abingdon.
- Genette G. (1997). *L'oeuvre de l'art : La relation esthétique*, Seuil, Paris.
- Goldblatt J. (2014). *Special Events, Creating and Sustaining a New World for Celebration*, John Wiley Sons, Hoboken.
- Gouyon M., Patureau F. (2014). "Tendances de l'emploi dans le spectacle", *Culture chiffres*, vol 2, n°2, 1-8.
- Greenwood R., Raynard M., Kodeih F., Micelotta E. R., Lounsbury M. (2011). "Institutional complexity and organizational responses", *Academy of Management annals*, vol 5, n°1, 317-371
- James D. (2003). "Intermittents : les raisons de la colère", *Commentary*, n°104, 981-986.
- Jonsen K., Jehn K.A. (2009). "Using triangulation to validate themes in qualitative studies", *Qualitative Research in Organizations and Management: An International Journal*, vol 4, n°2, 123-150.

- Lechaux B. (2009). "La mobilisation des intermittents du spectacle". In Traïni C. *Emotions... mobilisation*, Presses de Sciences Po, Paris, 57-77.
- Lelebina O. (2014). *The management of experts in companies: dynamics of professional groups and career paths*, PhD thesis in Management Sciences, Ecole Nationale Supérieure des Mines de Paris.
- Mair J., Whitford M. (2013). "An exploration of events research: event topics, themes and emerging trends", *International Journal of Event and Festival Management*, vol 4, n°1, 6-30.
- Mayor S., Liarte S. (2019). "Study of the influence of religious logic on organisation: Le cas des Scouts et Guides de France", *Revue française de gestion*, vol 45, n°281, 105-121.
- Malinovskyte M., Mothe C., Rüling C. C. (2016). "Aspirations identitaires, complexité institutionnelle et légitimité-Vers l'intermédiation pour l'innovation", *Revue française de gestion*, vol 42, n°255, 169-183.
- Menger P.M. (2002). *Portrait of the Artist as a Worker: Metamorphoses of Capitalism*, Seuil, Paris.
- Ministry of Culture and Communication. (2017). *Key Figures, Culture and Communication Statistics*, LIFO.
- Négrier E. (2014). "Festivalisation: patterns and limits". In Newbold et al., D. *Focus On Festivals Contemporary European Case Studies And Perspectives*, Goodfellow Publishers Ltd, Oxford.
- Ospital D., Templar C. (2018). "The professionalisation of associations, source or loss of meaning for voluntary action? Étude du cas Surfrider Foundation Europe", *RIMHE: Revue Interdisciplinaire Management, Homme Entreprise*, vol 32, n°3, 3-25.
- Pache A. C., Battilana J., Spencer C. (2019). "Managing Attentional Challenges in Social Enterprises: The Key Role Board Structure and Processes", *Academy of Management Proceedings*, published online.
- Straw P., Mucchielli A. (2012). *L'analyse qualitative en sciences humaines et sociales*, Armand Colin, Paris.
- Peyrin A. (2005). *Faire profession de la démocratisation culturelle: travail, emploi et identité professionnelle des médiateurs de musées*. Doctoral thesis in Sociology, EHESS.
- Reid W., Auger C. (2014). "L'exploration du leadership bicéphale dans les entreprises culturelles", *Gestion*, vol 39, n°4, 122-130.
- Tijou B. (2003). *Intermittents*, *Vacarme*, n°2, 59-59.
- Vauclare C. (2009). "Les événements culturels: essai de typologie", *Culture études*. vol 3, n°3, 1-8.
- Vergès E. (2018). "La médiation de pair à pair", *L'Observatoire*, vol 51, n°1, 76-78.
- Yin R.K. (2018). *Case study research and applications. Design and methods*, Sage, Thousand Oaks.

The Reggaeton of Cultural Policy

It is Latin America speaking! (and dancing)

Prof. Marco Antonio CHÁVEZ-AGUAYO

University of Guadalajara (Mexico)

marco.chavez@suv.udg.mx

ABSTRACT

Reggaeton is a very recent cultural phenomenon from Latin America. It is a fusion to which contributed “Reggae” from Jamaica (inscribed in the UNESCO Representative list of the Intangible Cultural Heritage of Humanity in 2018), adopted in Panama as *Reggae en español* (Reggae in Spanish); Hip-Hop, adapting it from the USA in Puerto Rico as *Hip-Hop en español* (Hip-Hop in Spanish), and the *Dem-Bow*, a Dominican rhythm that became the percussion base and the synonymous of Reggaeton itself. This merger was generated – unexpectedly or seemingly unplanned – at the end of the 20th century, although it has become more clearly popular since the beginning of the 21st century in the context of the effervescence of global Information and Communication Technologies (ICT) – which undoubtedly had an effect on its enormous potential growth and evolution.

Certainly, at its earliest times, reggaeton lyrics held many machismo speeches, narcotics and prostitution apologies, influenced mostly by the classic topics of Hip-Hop in the USA. However, as the phenomenon has globalised with the dizzying speed of cultural consumption in the current Digital Era – which has so much bent on the dynamics of the music industry worldwide in recent decades – reggaeton evolved both musically and discursively towards the opposite direction. After a few years of its evolution, the songs that still hold these contents are currently only a small proportion of the global production of reggaeton.

In a short time, reggaeton has become a "glocal" phenomenon that has contributed to give visibility and revalue, beyond political borders, different elements of Latin American cultural heritage, both local and shared in the Region: language, rhythms, dances, celebrations, traditional drinks, etc., as well as values such as solidarity, collaboration, interculturalism, diversity, and also social, political and historical criticism. Even in its origins, its founders projected it as a phenomenon for cultural connivance through music. This is sometimes promoted on the scale of global mass consumption, but also in alternative local movements, such as those of the LGBTTTTIQ+ community. The objective of this paper is to discuss and analyse the intersection of this new cultural movement from Latin America, Reggaeton, and its possible relation to Cultural Policy, reflecting on cultural production and consumption, and the involvement of the ICTs.

Keywords:

Reggaeton
ICT
Cultural consumption
Music industry

Introduction

Reggaeton resulted in the fusion of Afro-Caribbean and Central American rhythms, both traditional and modern. It is a very recent cultural phenomenon. To this fusion contributed “Reggae” from Jamaica (inscribed in the UNESCO Representative list of the Intangible Cultural Heritage of Humanity in 2018), adopted in Panama as *Reggae en español* (Reggae in Spanish), Hip-Hop, adapting it from the USA in Puerto Rico as *Hip-Hop en español* (Hip-Hop in Spanish) and the *Dem-Bow*, a Dominican rhythm that became the percussion base and the synonymous of Reggaeton itself, among other influences. This merger was generated – unexpectedly or seemingly unplanned – at the end of the 20th century. Although, it has become more popular since the beginning of the 21st century in the context of the effervescence of global Information and Communication Technologies (ICTs) – which undoubtedly affected the enormous growth and evolution it had (Chávez-Aguayo, 2020).

Indeed, at its earliest times, Reggaeton lyrics and iconography involved many machismo speeches, narcotics and prostitution apologies, influenced mostly by the classic topics of Hip-Hop in the USA. However, as the phenomenon has globalised with the dizzying speed of cultural consumption in the current Digital Era – which has so much bent on the dynamics of the music industry worldwide in recent decades – Reggaeton evolved both musically and discursively towards the opposite direction. After a few years of its evolution, the songs that still hold these contents are currently only a small proportion of the global production of Reggaeton (Chávez-Aguayo & Jiménez-Muñoz, 2020).

In a short time, Reggaeton has become a “glocal” phenomenon that has contributed to give visibility and revalue, beyond political borders, different elements of Latin American cultural heritage, both local and shared in the Region: language, rhythms, dances, celebrations, traditional drinks, etc., as well as values such as solidarity, collaboration, interculturalism, diversity, and also social, political and historical criticism. Even in its origins, its founders projected it as a phenomenon for cultural connivance through music. Reggaeton is sometimes promoted on the scale of global mass consumption, but also in alternative local movements, such as those of the LGBTTTIQ+ community.

This is a work-in-progress that is part of the main research project called “The social use and significance of Reggaeton: Beyond political and scientific borders,” which was presented – as well as its first ‘spin-off’ research titled “The discourse change of Reggaeton: from machoism to multiculturalism” – at the 11th International Multi-Conference on Complexity, Informatics and Cybernetics

(IMCIC 2020) in Orlando, Florida, USA, and latterly published by Elsevier (Scopus) (Chávez-Aguayo, 2020; Chávez-Aguayo & Jiménez-Muñoz, 2020).

The methodological design of this research is qualitative, and its character, phenomenological. Its cut is exploratory, as at the moment there is only meagre literature about Reggaeton, and no study was found within the scope of publications in Cultural Management or Transdiscipline (Carballo Villabra, 2006; Gallucci, 2008; Abramo & Capobianco, 2009; Martínez Noriega, 2014; Omaña Mendoza, 2016). This methodological framework is seen as reviewable and possibly modifying, as it is likely to qualitative research in progress, refining, and redirecting (Beuchot, 1999).

The main research project aims at analysing the social significance and social uses of Reggaeton from studies of perception and attitude and the discursive and metalinguistic analysis of songs, considering the “glocal” scope and the influence of ICTs on their production and consumption, under a transdisciplinary approximation. It works under two axes:

- ✓ The social significance of Reggaeton through the aesthetical, musical, discursive and metalinguistic analysis of songs, taking into account their codes, statements, ethical and aesthetic norms and the social, cultural and technological context of their production and consumption in the “glocal” field.
- ✓ The social uses given to Reggaeton through studies of public and attitude in different international contexts, as well as the analysis of cases that exemplify political, educational, cultural uses beyond the artistic, in an intercultural setting.

A transdisciplinary approach is proposed in this research, in which the theories, premises, and tools for methodological analysis of different disciplines – but not limiting – Musicology, Cultural Management, Communication, Social Psychology, Anthropology, Sociology, Dance, etc., could be applied and discussed around Cultural Policy, being also this its innovative proposal, methodologically.

Specifically, the objective of this current paper – which is another ‘spin-off’ research of the described main research project – is to argue, discuss and analyse the intersection of this new cultural movement from Latin America, Reggaeton, and its possible relation to Cultural Policy. As will be seen, in these phenomena, the ICTs are very involved, so there will be taken into account too.

To trigger or facilitate this argumentation – or maybe to make it more complicated – some questions to be addressed are: What comes first the culture or the policy? Can this new way of sharing and consuming culture through technology, coming from Latin America, condition or modify the cultural policy in the region and overseas? Can this recent phenomenon trigger a new discussion towards how cultural policy are thought and implemented?

Relevance

Reggaeton has become in a few decades a social and cultural phenomenon that has suddenly invaded the dance floors, radio stations, international awards, and the streaming playlists and apps around the World, except the Academic discussion. There are already many sociological and musicological studies done on different musical genres: Opera, Jazz, Rock, Pop, Hip-Hop... even Reggae), as well as languages and artistic movements, so why not yet Reggaeton?

It may be due to the speed with which the rhythm has consolidated as a new genre and has expanded globally, evolving very rapidly as a consequence. Often lately and especially in the context of the ICTs, which has dramatically changed many social dynamics in recent decades. Often, science grows slower than the development of social phenomena. In this sense, the innovative proposal of this research, not only addresses a deficit issue in the Academia but also proposes a transdisciplinary approach, not just to the artistic phenomenon, but to the cultural context in which it is produced and consumed – which is mediated by ICTs. The latter gives another dimension of innovation since none of the musical and artistic genres studied previously has emerged at the same time that these technologies, such as streaming – or real-time consumption –, that offers different means for creativity and reception (Chávez-Aguayo, 2020).

Added to the above, Reggaeton is also subject to controversy and violence, both in Academia and in social life. One of the leading causes of this violence is related to prejudice, a negative attitude based on cognitions, and not on empirical experience (Allport, 1979). Although during its first years of existence, while consolidating and gathering all the influences and musical styles that it shows nowadays, the musical and artistic resources Reggaeton used were not very sophisticated. Its topics were associated with machismo speeches, classism, and intensely sexualised (Chávez-Aguayo, 2020). The presence of female Reggaeton performers was low, and the content of their songs was something similar to the provided by the male performers (Barbie Rican and Jamsha, 2018). Then, as the genre evolved and acquired new influences, Reggaeton songs were addressing different issues, and their discourse was not only abandoning machismo but going in the opposite direction: Feminism (Chávez-Aguayo & Jiménez-Muñoz, 2020). Female Reggaeton performers

began to emerge and increase, whose poetic persona described as autonomous, independent (even emotionally), and empowered women without fear of expressing and pursuing their own desires and goals (LaPili, 2018; J Mena, 2019)

However, in a vast sector of public opinion — unfortunately including some academic and artistic spheres —, Reggaeton is still considered a vulgar, classist and machistic genre, with little creativity or artistic resources. Even felt if not as “without art,” at least as a “minor music.” As is typical, the prejudiced subject frequently avoids empirical experimentation to keep away of conflicting his/her cognition. This author presented research dedicated to analysing the prejudice against Reggaeton in Academia and other social spheres at the 4th (Biannual) Cultural Management Research Colloquium (*4º Coloquio de Investigación en Gestión Cultural*), held at the University of Guadalajara on 27 and 28 June 2019, and organised by the University Network of Cultural Management of Mexico (*Red Universitaria de Gestión Cultural México*). The resulting paper is in press and will be published shortly by the University of Guadalajara in a book chapter titled “Discrimination in Cultural Management. Reflections on Ethics and Reggaeton” (*Discriminación en la Gestión Cultural. Reflexiones sobre Ética y Reguetón*).

This research approaches Reggaeton in a more scientific way and without prejudice. It aims to find answers not in a single discipline but in many, being transdisciplinary. No matter how much broad it could be. To generate a transversal dialogue that allows the sharing of theoretical positions and methodological tools. Not only regarding the meanings and current symbols of Reggaeton, but also its ethical and aesthetic norms, based on its linguistic and metalinguistic discourses (Chávez-Aguayo, 2020).

The Culture (The Phenomenon)

As mentioned, at the first times, while consolidating, reggaeton was taking its influences from foreign cultures and rhythms (hip-hop, reggae, dembow, etc.) but trying to ‘latinise’ them, which is to ‘spice’ them with the Latin American culture. It occurred in the latest 1990s and early 2000s. It is hard to name all its founder ‘fathers’, who contributed in so many ways, such as the Panamanian producer Michael F. Ellis, whose invention of the word “*reggaetón*” is credited by the Royal Academy of Spanish Language, by adding the augmentative Spanish suffix “-tón” to the Jamaican rhythm “Reggae” to mean a “Big Spanish Reggae Movement”, in his own words (www.michaelfellis.com).

Those founders produced and recorded under the aesthetics of their age – when machismo and “pimp” aesthetics, inherited from USA hip-hop influences, were well-spread in media and social conscience (and unconscious) – lyrics such as “—shake it, shake it! —oh, so good!”, “you are as hot as a coca-cola bottle!”, “you hot and very tight mummy!”

The work of the founders was passed to a new generation of artists who started young in reggaeton, such as Las Guanábanas, Calle 13/Residente, El Chombo, Daddy Yankee. At this time, some of this work had been heard abroad Latin America and gained some popularity, possibly influencing other latitudes. This rhythm can be heard – maybe prematurely – in a Turkish song that was strangely very popular worldwide, “Şımarık” (spoilt girl) by Tarkan, from Turkey.

The official song for the XIX FIFA World Cup, men’s championship football, held in South Africa in 2010, “Waka Waka (This Time for Africa)”, performed by the Colombian Shakira and the South Africans Freshlyground, was never intended to be a reggaeton. It was inspired in the Cameroonian folk song “Zangalewa” and involved influences from both African and Latin American sides, a mixture of both traditions. However, listening the song these days clearly sounds like today’s reggaetons. But it is a decade-old hit – a blockbuster – which was the number one song in 50 countries.

As a coincidence, the 2010 FIFA World Cup Champions were – very unexpectedly, even to themselves – the Spanish team. Shakira was the partner of a very popular Spanish football players, the Catalan Gerard Piqué. The couple was already followed and even chased by paparazzi and tabloids at the World Cup. The Spanish Championship facilitated in the media a special narrative between the champion and the official song performer for tabloid romance, gossip magazines spring and, of course, more audience rate and sales. This increased the popularity of the song exponentially and the rhythm.

By the early millennium, reggaeton was a consolidated taste in Latin America and several Latin American consolidated artists in different music genres started featuring and then jumping in into reggaeton. Besides Shakira: Ricky Martin, Jennifer López, Marc Anthony, Thalía, Luis Fonsi, Carlos Vives, Gloria Trevi, etc.

Reggaeton lyrics started being less explicit as they were to be for a wider audience than before and the lyricists were other generation’s. However, they were still highly sexualised. For example, one of Daddy Yankee’s greatest hit’s lyrics saying “Give me more gasoline! I like gasoline!” was intended to be perceived highly sexualized as was expressed in the video clip of the song.

The movement started being associated with explicit sexuality in the general audience memory and stereotyping. As evidence, humour often targeted reggaeton for being least artistic, consumed by idiots and being only about sex – such as in stand up comedy and internet memes. Although perceived as low-classified art, only-sexualized or even female-degrading, it was very compelling and was danced as a “guilty pleasure”. Nonetheless, the influence and likeliness of reggaeton were also spreading abroad the Latin American “borders”.

By the mid and late 2010s, other artists were breaking the billboard, such as J Balvin, Bad Bunny or Maluma, whose narratives were abandoning machismo and embracing feminism more explicitly. But also, the appearance of women in the stage stopped being secondary or incidental. Female reggaeton singers “reclaimed” the stage (with no opposition), started to succeed and share the audience in same conditions as men, like Ivy Queen, Karol G, Greeicy Rendón, Becky G, and Anitta, among others (Chávez-Aguayo & Jiménez-Muñoz, 2020).

“Despacito” was a milestone song released in Spanish by Luis Fonsi and Daddy Yankee, both Puerto Rican, in 2017. This time, this song was not attached to anything, any movie, celebration or sports event. It seemed Luis Fonsi was doing in the laboratory the perfect song. He will use his decades of experience in the entertainment business, his music education and training, and perhaps his music gut, to study the ingredients to build the moment’s big “Latino” hit. Of course, it would be a reggaeton. He thought he would need a counterpart more experienced in the field, so he called Daddy Yankee to make the master finish polishing. The result was indeed a big success. The song was number one in 47 countries and was amongst the top 10 in other six. In the USA, this song brakes the record’s fame of the Spanish Los del Río’s “La Macarena” of 1996. It also won so many international prizes as well as broke so many world and history records, spreading and popularizing, even more, the movement and the rhythm. But the English-speaking audience wanted to understand something, at least a bit of the song.

“Despacito” was so successful that the teenage superstar singer Justin Bieber wanted to record a version to please his audience singing pieces of it in English. Or maybe their producers wanted it. At this time, Justin Bieber’s portion of the teenager and youth market in the entertainment world was enormous while “Despacito” was just getting popular abroad Latin America. But when Justin Bieber featured “Despacito” then it broke all the charts worldwide. However, Justin Bieber – a teenager – neglected his Spanish-speaking audience and even shown once disregarding of not having learned the Spanish lyrics of “his” famous song while playbaking in a concert. Maybe this is why Justin Bieber’s “Despacito” is secondary popular in Latin America.

Nevertheless, he started a tendency of a different and unprecedented “jump” in the world’s music business. Not just the consolidated artists from other genres in the Spanish language entertainment industry were jumping into reggaeton like Shakira, Ricky Martin or Luis Fonsi. Also, the artists in the big English language industry. The Big Market. Babylon. The great leagues of the world’s music industry. The same industry where decades ago artists such as Selena, Gloria Estefan or Celia Cruz struggled to climb. But the list is not only the three. From Cantinflas, Cri-Cri, José Ferrer, Consuelo Velázquez, Katy Jurado, Lola Flores, Miguel Bosé, Penélope Cruz, etc., the list of Spanish-speaking artists who have hardly struggled in the dominating English-speaking world’s entertainment business based in the USA is very long. However, this time, that market, Babylon itself, asked to be part of this new movement!

Another significant evidence of this was Madonna’s 2019 album “Madame X.” Her last album was in 2017, then, after two years of absence, this super consolidated artist – a legend – who already had tasted all styles and broke all rules, but never before jumped into Latin rhythms, as never did legends such as Michael Jackson, Cher, The Beatles, Barbra Streisand, Céline Dion, Mariah Carey, the Rolling Stones, the Kiss or the Cure. She just fell into reggaeton, mixed with cumbia, samba and, arguably, chachachá with two featured songs by the Colombian Maluma and other two by the Brazilian Anitta, mixing also English with Spanish and Portuguese.

But reggaeton’s popularity is not only present in the sphere of the world’s big music business, it has also been present in the more local arena of the LGBTTTI+ audience, calling its sub-genre “draggeton”, referencing the performing drag queens, like in the Los Teke Teke’s “Deja tu estrés” (release your stress) of 2017. This song, in particular, was intended to give visibility to the “TTT” community in the music and entertainment businesses. Another contributor to the visibility in this field is the Brazilian drag queen Pablló Vittar.

Also empowering messages were launched nationally by J Mena in “La Cobra” (the cobra) in Argentina (J Mena, 2019). In a different way but for kind the same audience, the reggaeton “Amiga, Date Cuenta” (Girl, open your eyes!) by Sailor Fag was launched with empowering messages for women to wake up from machismo in the lyrics and was a national success in Mexico, at least in the dancefloors, by 2018. This time, he was a fashion student of the University of Guadalajara in the local gay scene who recorded this song with apparently very low budget. However, the song was a hit at important bars and discotheques in different cities across the country, and people liked it. Gay bars were those who most played it, but not the only ones.

“National success” does not mean a song could not be known, popular, or even played in the dancefloors in another country. For reggaeton, borders seem not to be compatible. This is, of course, related to its coexistence with the ICTs.

In the late XX century, the golden years of the media, people were mostly fed cultural contents by the media. The TV and radio program editors decided which contents were to the air – so were known to the public – and which were to be hidden – so remained unknown. The artist – or in current terms, the ‘creative’ – needed an editor to “be seen”, namely been published, been recorded, been transmitted, etc.

In this XXI century, but mostly in this ICTs era, this scenario is simply not possible anymore. Because of the structure of the network’s net – the Internet – all the available contents are available interconnected. This democratizes the contents as it makes them all with the same availability. So, there is no need for the intervention of an editor anymore in any field to be reached and seen – only an internet connection is needed to access all the contents. There can be still “editors”, who chose better contents for their means, but there is not anymore a need. It is simple to say, but all the industry is on jeopardy to some extent and needs to transform if wants to survive.

With the democratization of the contents also came the democratization of the production. The ICTs evolved in such ways that made it very easy to record audio and video in high quality and share it on real-time. So, this kind of cultural products was much even simpler to create. Decades ago, it was unthinkable what is now possible to produce on audio and video with one simple mobile phone device.

Precisely, it looks like the popularity of reggaeton and the extreme possibilities of creating and sharing cultural contents with the ICTs and the Internet are being the perfect cocktail for this cultural phenomenon for becoming more complicated, although it keeps still under-researched.

The Policy (The Discussion)

With this background, maybe we can start with the questions: Do we need to think of a cultural policy for that? Or do we rather wait until we need for a cultural policy for reggaeton? Is it, on the contrary, an improper question regarding cultural policy?

It seems logical, the answer to the question “What comes first? The culture or the policy?”: The culture. But sometimes this is not how politics work.

If we see that there is here a supporting question for reggaeton as a new beat, as a new sound in Music, as someone who likes rock supports a cultural policy for rock, or who likes crochet wants a cultural policy just for crochet, is missing the bottom of the point.

As a musical genre, even as a cultural movement, it surged the same way as other movements. Resignifying elements from different influences (previously discussed) and creating a new (combined) aesthetic. As a new genre, it has been disliked by the old-schooled or the previous school, as usual in History. Classicism disliked baroque, modernism disliked romanticism, postmodernism disliked cubism, and so on. Classic disliked jazz; jazz disliked rock, rock disliked pop, and so on.

However, in the evolution of reggaeton, there have been dynamic-changing events at the global scale, as some of the great leagues' big fishes of the English-speaking entertainment market wanted to jump in into reggaeton, such as Justin Bieber or Madonna, followed by many others, or the democratisation of production and consumption of cultural contents due to the simultaneous effervescence of both reggaeton and the ICTs. The combination of this makes reggaeton a more "glocal" phenomenon. That is a phenomenon that is, at the same time, produced and consumed locally and globally.

So, this is not about a beat or a sticky new rhythm. Not even about the new aesthetics of reggaeton. It is about these new and very complex ways of simultaneous local and global consumption and production of cultural products (songs, videos, programs, shows, parties, festivals, contests, parades, etc.) that reggaeton, as a cultural movement, is inspiring and triggering. There are music legends and celebrities singing it, as well as local singers, drag queens, students, males, females... It looks like no one is excluded.

In other sense, reggaeton has evolved in a different way than other movements have done. Regularly, when a new artistic movement arose, it tried to differentiate itself from its influences and to take distance and cut with the past. However, the social use of Reggaeton is being intercultural. Performers from different countries (not only among Latin Americans) gather to perform Reggaeton, sing in Spanish, and share aspects of their own culture and fusion with their identity rhythms. Most of the Reggaeton songs fusion at least with another rhythm, mainly a local and identity rhythm: Salsa, Cumbia, Flamenco, Rumba, Samba, Bachata, Vallenato, Catalan Rumba, Tango, etc., but even with those that influenced it: Reggae, Hip-Hop, and also "foreign" rhythms, such as Pop, Disco, Jazz, Circuit, Trap, Heavy Metal, etc (Chávez-Aguayo, 2020).

In the last decade, reggaeton has spread messages of feminism, diversity and interculturality. Also, both the genre and its performers have been involved so far in History criticism (PlayGround Fire and Beauty Brain, 2018; PlayGround Fire, Mind Sylenth and Mila J-Lo, 2018). Social theory and Gender theory dissemination (Residente, Dillon Francis and Ile, 2018) and even political protests (Robles, 2019; Orozco, 2019; Laborde, 2019).

So, should we think of a cultural policy for people to gather together to reflect and spread messages of interculturality, equality and inclusion, involving sexual diversity and feminism, around music and the arts? or should we think of a cultural policy for reggaeton? Should we create cultural policy for young people to use the ICTs to share their culture, their contents, their thoughts? Or should we better promote reggaeton?

Or what if... we should better use reggaeton to change the cultural policy? As reggaeton seems to be having its own cultural policy, its own agenda.

The Closing

As this discussion is still premature and ongoing, this paper can offer a closing. Some more questions:

What happens with a cultural manifestation when the policymaker is prejudiced, and he/she does not question his/her own prejudices? What happens if an old-schooled policymaker dismisses anything related to reggaeton and these derivatives in neglecting, ignoring or wasting energies in something else than promoting diversity, unity, and inclusion?

As we have seen, reggaeton is not only a rhythm or a way to make music. Is a new aesthetics in music, impacting in audiovisuals, fashion, plastic arts, performing arts, etc; it is a new cultural movement. As such, it produces its own dynamics and spreads its values. Its most current values, which is spreading at the top of its popularity, are about equality, inclusion and the acknowledgment of diversity. In the meantime, the Spanish language and some “Latino” cultural codes are being used as instruments for these messages. The mean of “Latino” has been widened. There are not only the singers from the Latin American countries who want to be included. Also, the singers from the USA with a Hispanic background, such as Becky G, with backgrounds from Jalisco, Mexico, who wants to be called “Latin American” too. But “Latino” now includes the singers in the Iberian peninsula, such as the Spanish C. Tangana or the Catalan Rosalía, who equally mixes reggaeton with flamenco and Catalan rumba. Often, in other contexts, “Latin” referred to the group of nations, cultures or languages derivated from the Latin language.

In the case of languages, they were also called “Romance” languages, those derived from Latin: Spanish, French, Italian, Portuguese, Catalan, Romanian, etc. In reggaeton, this meaning of “Latin” perhaps is being tried to be recovered, as French artists are also jumping into reggaeton, such as Maes and Ninho, but most notably the French/Malise Aya Nakamura, who remixed her hit “Djadja” with Maluma in 2020. In the other hand is Fred de Palma, the most prolific Italian reggaeton singer so far, who has dueted with the Mexican Sofía Reyes and the Spanish Ana Mena, singing mixed in Spanish, Italian and English. There are reggaeton singers in Catalan as well, such as P.A.W.N., or the same Rosalía in “Milionària” (millionaire). There are also examples of reggaeton from Roumania, as it could be “Caută-Mă”, a single by JO and Juno. Nonetheless, Lo and Leduc sing reggaeton in German and Sơn Tùng M-TP is singing in Vietnamese, like his single “Hãy Trao Cho Anh”, recorded with Snoop Dogg – this time a big industry USA hip-hop legend taking the ride to jump in into reggaeton.

If we go back in History of Music – not History of Music in Europe, but in the Americas –, there is very few written information survived about the “pre-colonial” period in this Continent regarding music and dancing. Very few original instruments survived as well. Researchers know very little about how indigenous in the Americas could write and perform and understand music. Most of these traditions involving music and dancing must be lost, unfortunately, as many other intangible heritage. Or, the alternative, is that this heritage survived inherited, transmitted, but fused with the colonial culture. Maybe something was lost and something was incorporated, and this is how culture is interwoven and shared. Something is liked better and something is dismissed. Precisely, the colonial period was the moment of influencing from the migration due to trade and business, which also provided slavery and people trafficking from Africa. But African people brought a culture, a music and a dancing, that matched in some way the culture that was mixing in the “new world”, the latterly called Latin Americans. (However, it also impacted in the north, precisely with the jazz and blues, etc.)

However, for centuries, Europeans had the means for making prevail their way of coding and performing music, and hence the history of the development of their system. At these modern times, the standard way of writing music is still the European, and more particularly the Italian, as it came from the Italian peninsula since Guido d’Arezzo in the Middle Age. The indications in the scores, such as “piano” or “forte”, meaning soft or hard, are Italian words because of that. Then, the Italian operas were the standards for the big shows in the world for centuries, copied by Frenches, and Germans many times.

But things changed with XX century and show business moved to the new continent, but in the USA, mostly Hollywood. Music and dance were now jazz, blues and musicals. Opera was dead and the USA had now the means to keep the industry. Then, everyone wanted to be part of Holly-

wood instead of the Opera. Maria Callas was a damnified. They wanted to be part of the thrilling English-speaking industry of the USA and made queue. Some significant artists in their Latin American countries made queue in the Hollywood scene to have an opportunity in a secondary role (i.e., the maid). In 1996, Luis Miguel felt very lucky for being selected to record the Spanish version of the official song “Sueña” of Disney’s animation movie “The Hunchback of Notre Dame”. This kind of achievement was a career milestone for any Latin American artist. At this point, Luis Miguel was already very successful and experienced but still felt this like a great achievement.

Remembering this, seems strange how now big legends have come to sing reggaeton (Justin Bieber, Madonna, Snoop Dogg), a Latin American invention. Artists like Selena (Quintanilla) or Celia Cruz never had the chance to be invited to sing in duet with Madonna, like Maluma or Anitta just did. How did this happen?

Clearly, this is a tendency where the values, codes and aesthetics coming from the “Latino” culture (above defined) are now ruling. Most importantly, those from the Latin American and the Iberian Peninsula countries, sharing their culture mostly through the ICTs. These new cultural aesthetics, contents and products are so much liked that the outsiders (people from outside Latin America and the Iberian Peninsula countries) are asking for a share – even those who come from the ruling market are now asking.

With all these, there is a global revaluation of the “Latino” cultural contents (against the anti-immigrant discourse and prejudice raising in countries like the USA in the Donald Trump administration), including the use of Spanish language in Reggaeton as its *lingua franca*. The Spanish-speakers had a Golden Age in the baroque with San Juan de la Cruz, Juan Ruiz de Alarcón and Sor Juana Inés de la Cruz. Also distinguished in Modernism and Muralism with Diego Rivera, Frida Kahlo, Fernando Botero and José Clemente Orozco, among others. Then, again recognized in Literature in the XX century like with Octavio Paz, Mario Vargas Llosa, José Saramago, etc. Finally, “Latino” movies sparkle with Pedro Almodóvar, Alejandro Amenabar, Alejandro González Iñárritu, Guillermo del Toro and Alfonso Cuarón. Is this the time for the Latin American musicians and artists to take the global stage and lead?

All these new argued tendencies for production, consumption, sharing, market, business, etc., for the same rationale there are linked in this argumentation, must have cultural policies which understand their contexts and provide the resources to be efficient and comprehensive so they can reach their goals and spread their values. What other social and political “glocal” dynamics are we missing for being looking to different sides?

REFERENCES

- Abramo, C.W. & E. R. Capobianco, "Nación Reggaetón", Nueva Sociedad, No. 223, 2009, pp. 29-38.
- Allport, G. W. *The Nature of Prejudice*, Reading, USA: Addison-Wesley, 1979.
- Barbie Rican & Jamsha, Calocha [song/audiovisual], Puerto Rico: Sony Music Latin, 2018.
- Beuchot, M. *Heurística y hermenéutica*, Mexico City: Universidad Nacional Autónoma de México, 1999.
- Carballo Villagra, P. "Reggaeton e identidad masculina", Cuadernos Intercambio Sobre Centroamérica y El Caribe, Vol. 3, No. 4, 2006, pp. 87–101.
- Chávez-Aguayo, M.A. & Jiménez-Muñoz, A. (2020). "The discourse change of reggaeton: From machoism to interculturalism", in: N.C. Callaos, S. Hashimoto, N. Lace, B. Leybourne, P. Poszytek (Eds.), *IMCIC 2020-11th International Multi-Conference on Complexity, Informatics and Cybernetics*, Proceedings(2), 195-200, Elsevier, ISBN 978-1950492329
- Chávez-Aguayo, M.A. (2020). "The social use and significance of Reggaeton: Beyond political and scientific borders", in: N.C. Callaos, S. Hashimoto, N. Lace, B. Leybourne, P. Poszytek (Eds.), *IMCIC 2020-11th International Multi-Conference on Complexity, Informatics and Cybernetics*, Proceedings(2), 134-139, Elsevier, ISBN 978-1950492329
- Gallucci, M.J. "Análisis de la imagen de la mujer en el discurso del Reggaeton", *Opción*, Vol. 24, No. 55, 2008, pp. 84–100.
- J Mena, *La Cobra* [song/audiovisual], Argentina: Altafonte Music Distribution, 2019.
- Laborde, A. "Revolución en Puerto Rico a ritmo de reguetón [Revolution in Puerto Rico at the rhythm of Reggaeton]", *El País* [newspaper], 29 July, 2019, retrieved from https://elpais.com/elpais/2019/07/29/gente/1564414757_656338.html.
- LaPili, *Muslona* [song/audiovisual], España: Muslona Records, 2018.
- Martinez Noriega D.A. "Música, imagen y sexualidad: el reggaetón y las asimetrías de género", *El Cotidiano*, No. 186, 2014.
- Omaña Mendoza, E.E. *Reggaetoneros/as en la Zona Metropolitana del Valle de México: Radiografía de una Cultura Juvenil* [Master's thesis], Mexico City: Universidad Autónoma Metropolitana, 2016.
- Orozco, G. "Los artistas puertorriqueños que se han sumado a las protestas contra el gobernador de Puerto Rico [Puertorrican artists who joined the protests against the Governor of Puerto Rico]," *Chicago Tribune* [newspaper], 21 July, 2019, retrieved from <https://www.chicagotribune.com/hoy/entretenimiento/ct-hoy-los-artistas-puertorriquenos-sumados-a-las-protestas-20190721-ccrj2yoqujdetjgglk4amlx42e-story.html>
- PlayGround Fire & Beauty Brain, *Te Coloniso* [song/audiovisual], España: PlayGround, 2018.
- PlayGround Fire, Mind Sylenth & Mila J-Lo, *Cleopatra-Bésame el triangulito* [song/audiovisual], España: PlayGround, 2018.
- Residente, Dillon Francis & Iie, *Sexo* [song/audiovisual], Sony Music Entertainment, 2018.
- Robles, F. "'Afilando los cuchillos': Los músicos se unen a las protestas en Puerto Rico ['Sharpening knives': Musicians Join the Protests in Puerto Rico]", *The New York Times* [newspaper], 19 July, 2019, retrieved from <https://www.nytimes.com/2019/07/19/us/puerto-rico-residente-iie-afilando-los-cuchillos.html>

The Will to Give: Family Foundations, Legacy, Trust and Cultural Policy

Angela Besana

IULM, Italy
angela.besana@iulm.it

Annamaria Esposito

IULM, Italy
annamaria.esposito@iulm.it

Chiara Fisichella

IULM and LUMSA, Italy
chiara.fisichella@iulm.it

Maria Cristina Vannini

soluzionimuseali- ims sas, Italy
cristina.vannini@soluzionimuseali.com

ABSTRACT

Today, cultural policies need to match multiple issues with multiple stakeholders, who are willing to support culture and creativity. Grant-making foundations are increasing their roles and they are pooling resources, several stakeholders ensure their trust and management for. For their being able to enhance and connect trust of all stakeholders, family foundations are the pivotal node of the community philanthropy. Results of cluster analysis of a US sample confirm trustworthy effectiveness and focus on community issues, education, creativity and culture, while the use of communication channels varies. The paper provides an overview of legacy for a kind of philanthropy for culture, which is not usually investigated and given evidence to in scientific papers. Revenues and grants diversification, segmentation of stakeholders and causes, range of communication tools and the specific governance inside the family (and outside) show a philanthropy value chain and benchmark for the same issues within different geographical boundaries.

Keywords:

Legacy
Trust
Marketing
Policy
Family foundation

1. Legacy Economics of Family Foundations

Among several grant-making foundations (independent, corporate, community) in America, family ones are the perfect connection with a will and a legacy, both of them combining social goals, which are matched with issues and policies of public administrations and, at the same time, with commitments to the interests of a family (Cho & De Moya, 2016; Harrow & Jung, 2011; Hall, 2006). The family may refer to famous US entrepreneurs or/and citizens, whose assets (money, heritage, investments, works of art, contributions, etc.) are targeted to social goals crossing boundaries of family priorities into foundations, whose boards are mainly family members.

Different factors may be at the basis of the creation of a family foundation: it can be done out of mecenatism, or out of preservation of the capital. Among the first group, family foundations belong to two main segments: the ones who are called to maintain vivid the remembrance of the activities and the interests of the person under whose name the foundation has been established, and the ones who aim at returning to the community part of the benefits they have gained during a life time. In both cases, the human and psychological aspect of being considered a benefactor is at the basis of choosing a foundation, versus the chance of setting up a Donor-Advice Fund.

The will can concern a legacy and what the founder (founders) wants to deliver to next generations. Merit causes encompass welfare, education, culture and creativity, health, environment, social inclusion and any other priority of a community. Education, college access and literacy are consistent with at least one quarter of their issue focus. Arts and culture are present in their community initiatives, being at least six percent of their issue focus (National Centre of Family Philanthropy, 2020). Basic needs and inequality are focus of the newest foundations and education is an area, which foundations of different age they concentrate resources around. To the topic 'education', other projects can be connected, like nutrition quality, job training, sustainability and inclusion.

Crossing boundaries of communities, both will and legacy can refer to needs of the county, the State ... and sometimes, crossing boundaries of the State and even of the United States of America. International cooperation and world urgencies (hunger, environmental issues, pandemic virus) can be grants-paid. From community to national issues, these foundations connect with administrations and their policies in order to select merit causes, around which they pool resources and enforce effective strategies. Trust is essential in local, national and international initiatives. International cooperation may need upper-national (cultural) policies, whose issues and focus, they are not here investigated.

Family foundations engage with communities thanks to public and private partnerships, which include trusts (as a definite legal framework), corporations (some of them of the same family and citizens), public administrations, grant-makers, international organizations (Park & Campbell, 2018; Besana & Esposito, 2016). While in many cases, the funding cycle is formally based on calling for applications, it might happen that organizations address directly the foundations for specific support.

The main governance may add boards, employees, volunteers and contributors of the family foundation to the governance of the public and private partnerships, whose leaders remain families. As for a report of the American Alliance of Museums published in 2017, the engagement of the members of the boards of the foundations working in the museum/cultural area with their audiences and communities is scarce and this is mainly due to the little diversity in representation inside the boards themselves. Segments of communities have rarely voice in the final family foundation decisions especially when the most part of the board is family -driven. Public administrations can, otherwise, drive and connect boards and communities around goals, they can implement their policies for. As long as project management is not lead by the board, family members of the same board, they can be available for partnerships with public administrators, who play leading roles.

Besides, when the foundation is mainly family-driven, due to the relevant running costs including taxation, in comparison to running a fund, cuts on staff costs may include the communication sector. Stakeholders can be relevant and play roles as a staff of partnerships, which family foundations cannot contribute a communication staff for. Trust is as pivotal as legacy. This economics include both tangible assets like the legacy of money, heritage, buildings, offices, museums, financial assets and intangible ones: inspiring ideas, stories, traditions, original concepts and techniques, like the heritage by Walt Disney and the trust, which is the fundamental node of this philanthropy and project management.

Notwithstanding, legacy economics is built on four pillars: 1. strong will of a family, with identity and visions fully represented in trusts, boards and strategies; 2. commitment of this family into entrepreneurship for- and/or not-for-profit like family foundations, whose governance is run by the family; 3. community engagement with city, area, county, national projects. Nevertheless, family foundations seem able to cross these geographical boundaries in order to collaborate to the achievement of international and world issues like education, climate change, hunger, multi-cultural development. Trust can upgrade with complexity of project management from local to international approaches and goals; 4. both profit- and not-for-profit partnerships, when goals will be perceived, grant-made, monitored and achieved thanks to multiple stakeholders.

Main objective of this research is to investigate how much US family foundations develop their legacy and philanthropy within their governance, the communities and stakeholders they connect with thanks to different communication channels. Emphasis will be provided for their being connected to administrations, as for local (and national) issues, when policies are matched with their fundraising and grant-making. Above all, for education, culture and creativity.

Cluster analysis of stakeholders and economic performances (2017) allows to identify poles for segments of public and not-for-profit stakeholders, commitments, relevance of media, with the meaning of diversified efforts for different missions and issues: from community development to health, from creativity to environment, from education to poverty. The choice of the sample concerns 40 biggest US family foundations in regards of their revenues and total impact according to the National Center for Family Philanthropy.

Results of cluster analysis confirm effectiveness and focus on community issues, together with a large variety in the use of communication channels by different role-players in their governance, from family to non-family staff. Cultural and welfare policies are effectively implemented thanks to an agile and committed relationship with public administrations at different levels of the public hierarchy. These relationships can include other grant-makers, foundations, nonprofit organizations.

The paper provides an overview of legacy economics and marketing for a philanthropy which is not usually investigated and given evidence in scientific papers. Revenues and grants diversification, segmentation of stakeholders and causes, a large range of communication tools and the specific governance inside the family (and outside) show a philanthropy value chain and benchmark for the same issues within different geographical boundaries.

2. Legacy and Relationship Marketing in Family Foundations

Facing new challenges, relationship marketing (Morgan & Hunt, 1994; Berry, 1995), although not new to the nonprofit sector, could be a pivotal strategy to attract, cultivate, and enhance long-lasting stakeholder's relationship, as well as to create mutual social value for the partners in relational exchanges (Moore, 2000; Kim, 2016). Morgan and Hunt, (1994) categorized relational exchanges in four levels: relationships with buyers (customers and channels of distribution), relationships with suppliers of goods and services, internal relationships (among employees or functional departments and lateral relationships (with competitors or governments).

In line with this scheme (Figure 1), family foundations' relationship marketing orientation, as non-profit, is reflected in the degree to which they maintain close relations in four areas (Kotler, & Andreassen, 2020): customer relationships (with grantees, citizens and not citizens, who are visiting their museums if house museums with story-telling of their founders), supplier relationships (with family, donors, partners and sponsors), lateral relationships (with other foundations, the Government and local administrations of their communities) and internal relationships (with board, member, staff and volunteers), taking into account that different groups require the elaboration of different marketing strategies for each of them.

With this in mind, the success of family foundations, as they involve high levels of social exchange, is, therefore, dependent on the relationships established and developed between the family and multiple stakeholders. Developing strong connections with donors and the donor's family, board and staff - volunteers included -, grantees and grant-seekers, the public and governmental bodies, and provide them with information directly suited to their needs and interests, promoting open communication and spreading awareness of the social value, all that above lead to the achievement of the mission (Bussel & Forbes, 2006; Sargeant, 2009). Indeed, whether stakeholders are grantees, consultants, or foundation colleagues, family foundations are often called upon to treat issues of role and relationship with special sensitivity.

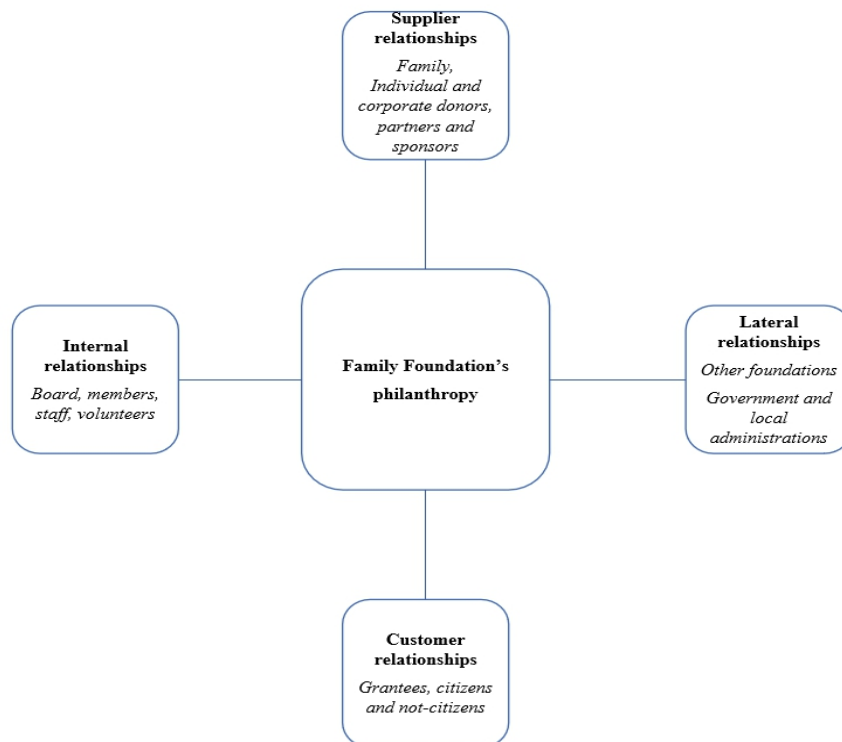


FIGURE 1. RELATIONSHIP MARKETING IN FAMILY FOUNDATIONS.

Source: own elaboration

The concept of relationship marketing and its application to the field of philanthropy is recognized in the scientific literature as well as in professional field and given the outright need for funds to necessary for the implementation of the organizational mission. Furthermore, understanding how to adapt to an ever-changing environment will mean developing new models of relationship-building that inspire, deepen, and sustain interest in philanthropy over time.

Relationship marketing could help to reach this goal, because it relies in the ability of foundations to create an emotional connection between their causes and donors and to convince them that their causes are worth their attention, time, and money. From the other side, relationship marketing could be seen as relationship fundraising (Burnett, 2002) focused on donocentrism (Sargeant & Shang, 2017) that allows foundations to put the family and other donors at the hearth of communications in order to enhance the well-being of supporters and make them feel connected with beneficiaries. The more intensive and trustworthy the cooperation and dialogue between stakeholders and foundations, the more the community is aware of specific issues impacting quality of life and might appreciate the programs offered by foundations to address those issues. This also means an increase in contributions from several stakeholders, as trust is increasing with contributions.

Strategic effective communication is crucial for relationship marketing and essential for helping foundations to understand their target audiences (Command, Mersereau, 2001), to improve the quality of services and relationships, to develop trust and reputation, and to attract resources (Balsler & McClusky, 2005).

3. Strategic Communication and Social Media in Family Foundations

To increase the impact of a Family Foundation and its legacy, it is very important to use strategic communication to disseminate its mission, values and activities. “Strategic communication is the purposeful use of communication by an organization to fulfill its mission” (Hallahan et al., 2007, pag.1) and involves six disciplines: management, marketing, public relations, technical communication, political communication, and information/social marketing campaigns (Hallahan et al., 2007). This means that Family Foundations need an organizational structure capable to do strategic communication. But a recent survey on US Family Foundation show that only two-thirds of their boards include non-family board members, and more than the 70 percent of their board positions are held by family members (National Center for Family Philanthropy, 2020): skills and vision needed to plan strategic communication might not be present at the table of the borders or even not recognized as vital to be integrated with a specific compartment.

Having a founder or a family member as a brand ambassador of the Family Foundation is something good for the reputation and stakeholder relationship of the organization. But founders are much less likely to place value in communicating mission, values and results to external audience and to integrate external feedbacks (National Center for Family Philanthropy, 2020). Conversely, a two-way communication is actually needed: balance, social reporting, celebration of topical moments and all top-down communications are no more sufficient to engage stakeholders.

From this point of view, social media undoubtedly represents a challenging opportunity: they allow Family Foundation to build meaningful relationships with stakeholders thanks to an active and proactive forms of dialogue. But, the 71 percentage of Family Foundations use at least one type of channel to communicate externally (National Center for Family Philanthropy, 2020). Website is used from the 52 percent, Facebook from 18 percent, Twitter from 8 percent and Instagram from 4 percent (National Center for Family Philanthropy, 2020). Using only the website to communicate externally can be considered the ground zero of a social media strategy: it is still a top-down approach and give little visibility to activities and projects. The choice not to use social media could derive from a desire to focus attention on institutional communication or a fear of not being able to manage the continuous monitoring and dialogue that social media need. In previous researches about US grant-making foundations, some of them revealed a wider range of communication tools and they were much more versatile and updated with social media opportunities (Esposito, Besana, 2018; Besana, Esposito, 2016) than family ones, whose choice could be connected to the focus on face-to-face dialogue with and within communities, day by day, thanks to family boards and staffs in quarters, meeting rooms and public buildings where grantees, citizens any other stakeholders may be collected and pay attention to community leaders like family foundations.

4. The sample, the methodology and the empirical results. Profiling of family foundations connecting with policies

The sample includes the 40 biggest family foundations, whose 2017's accounting of revenues, costs, assets and net assets, governance (boards, employees, volunteers), lists of contributors and stakeholders, lists of paid grants were collected from 990Forms, for available data at Charity Navigator and Guidestar in April and May 2020. The sample was selected out of two datasets for relevance and the highest gross receipts in 2020.

Main ratios were filed for shares of revenues (contributions, dividends and interests, sales of assets, other income), shares of expenses (for paid grants and payments to boards, officers and trustees), gains or losses as shares of net assets. Contributions can prevail as for revenues, above all,

when contributors are the family members. Nevertheless, investments are prevailing assets and, as a consequence, dividends, interests and asset sales can be the main revenues, though program service revenues are not excluded when families own house museums and heritages, where the history and legacy of the family is represented and story-told and when contributions are zero, as contributors do not more include family members.

Next to economic performances, family identity was counted 1 for a board of family members and 0 for a board with family and non-family members. Community identity was counted 1 for paid grants only to the community (town, county and State) where the family foundation is settled and 0 for paid grants out of the community, for international boundaries of goals and projects (education, poverty, hunger, climate change, world health) of wider range than the community specific issues. Staff of these foundations is the family and only for big foundations staff is family and non-family.

The magnitude of relationship marketing was investigated on websites of foundations and thanks to reports of the National Center of Family Philanthropy. As concerns social media, their engagement ladder was appreciated with surfing from websites to (mainly) facebook and twitter pages, where different types of contents included programs and calls with the whole life-cycle of launching, monitoring and evaluation phases of different projects. Social media were investigated for their replies to specific issues and questions of grantees, citizens and other grant-makers. Connections with administrations and their policies were investigated for their redundancy of calls for action, story-telling of project steps and monitoring, echoes of referendum and discussions on their websites and social media. Evidence of this qualitative search was integrated in the analysis and comments of clusters.

Normal Mixture clustering was implemented for ratios and identities of the sample. Normal mixtures is an iterative technique implemented in the k-means clustering platform, but rather than being a clustering method to group rows, it is more of an estimation method to characterize the cluster groups. Rather than classifying each row into a cluster, it estimates the probability that a row is in each cluster. In the expectation step, the probability of belonging to each cluster is scored: first the squared distance of each point to each cluster mean, scaled by the cluster standard deviations is obtained. Secondly, this is transformed into a value proportional to the normal mixture density by taking a cluster factor times the exponential of -0.5 times the squared distance. Then they are normalized to sum to one for each point across the cluster groups to form the (posterior) mixture probabilities for that row. In the maximization step, new means and standard deviations are estimated for the clusters. This is done for each cluster by just using the membership probabilities as weights for the means and standard deviations.

The investigated sample resulted here for three significant clusters with JUMP Statistical Software (Table 1 and Table 2). Table 1 include economic performances and indexes for family and community identities. Table 2 concerns composition of clusters for a sample of foundations whose highest assets are more than 696 millions US dollars, whose total assets for the whole sample are more than 2,600 millions of US dollars, whose total revenues for the whole sample are more than 254 millions US dollars, whose highest contributions (as shares of their revenues) are more than 19 millions US dollars, whose total contributions for the whole sample are more than 61 millions US dollars and whose total grants-paid are more than 161 US dollars. One family foundation is an outlier for economic performances and one cluster itself. It was not here discussed.

Clusters Performances and identities	CLUSTER 1 In- vestor and not only for commu- nity,20 FF	CLUSTER 2 Grants Collec- tor & Maker in community,12 FF	CLUSTER 3 Grants Collector & Maker not only for community,7 FF
Contributions / Total Revenues	1.97	68.18	82.04
Dividends and Interests / Total Revenues	43.81	11.59	1,89
Sales of Assets / Total Revenues	51.23	19.77	8.53
Other Income / Total Revenues	2.98	0.44	7.52
Gain or Loss / Net Assets	-1.75	-9.51	+29.65
Paid Grants / Total Expenses	75.54	72.75	68.09
Compensations for officers, directors and trustees / Total Expenses	2.23	0.49	4.20
Family Identity	1	1	0
Community Identity	0	1	0

TABLE 1. 2017's PERFORMANCES AND PROFILES OF A SAMPLE OF US FAMILY FOUNDATIONS

(CLUSTER MEANS AS PERCENTAGES, APART OF FAMILY AND COMMUNITY VARIABLES)

Source: own elaboration of 2017's data, with JUMP Statistical Software

CLUSTER 1	AUSHERMAN, BRADDOCK, CHAN SOON-SHIONG, DAILY, DAVIS, DCA, ERB FRED A & BARBARA M, GAWLICKI, GIBNEY, GRACE, HOFFMAN, KERN ROBERT D PATRICIA E, MARSH TOM AND CHARLENE, POMEROY, ROGERS T GARY AND KATHLEEN, SEGAL, SOBRATO, STIEREN KELSO BETTY, WASILY, ZACHS
CLUSTER 2	ARI AND ESTHER MUNK, GADDIS, GRAY, HAMILL, HASTINGS, JAGODA, KAISER HENRY J, MCCLUSKEY RAMSEY, MOURNING, NEUHAUSER, TABAT, TAYLOR
CLUSTER 3	ARNALL, BRUCKNER, MCLAUGHLIN, PUJOLS, SCHIAVI, WALT DISNEY, WOODRUFF

TABLE 2. COMPOSITION OF CLUSTERS Source: own elaboration

Without contributions and with diversified incomes from investments, the most crowded Cluster 1 is the Investor not only for the community. Social goals include priorities of their communities and grants for not-for-profit organizations out of the State where they are settled. Cultural policies are here committing family foundations for local and national projects. Out of the State, policies can be less binding than international multi-level agreements and pooling of resources from multiple stakeholders. With the highest paid grants, they commit themselves to social welfare and several good causes, according to family members who are the only ones in their boards. As they are grant-making not only in one State, public and private partnerships concern several stakeholders whose engagement is granted by communication tools of wide range, social media included. When they connect with international issues (like Segal Foundation with several projects in Africa), they maximize their relationship marketing with multiple audiences and, at the same time, the complexity of communication includes social media for monitoring of project implementation and according to updated suggestions. Most of the local and national issues of this cluster regard education. For example, the Braddock Foundation is leading projects for business students to improve academic performance and maximize academic potential. The Foundation also supports non-profits that provide educational services and literacy programs to local communities. Some of foundations in this cluster are giving funds for art education and, next to art education, they are pooling resources and they are providing their management for museums, theatres, chorus (for example, Ausherman). When they match resources for local areas, they are connecting with local administrations and they are inspiring cultural policies and inspired by cultural policies. They are connecting with multiple nonprofit organizations too, in order to raise and deliver funds for common projects, like Sobrato, who is provider of three hundred thousand square feet of offices and meeting places for nonprofit organizations.

Cluster 2 Grants Collector and Maker in community is the opposite for economic performances and community identity. Contributions are prevailing revenues and with the lowest compensations for their boards, they commit themselves only to their communities. They use at least one type of channel to communicate, and social media are not relevant. Relationship marketing could help to reach their goals because it relies in the ability of foundations to pool attention and resources of different stakeholders, create an emotional connection between their causes and donors and to convince them that their causes are worth their attention, time, and money. Cultural policies are here relevant to connect stakeholders on projects from education to performing and visual arts and to collect plentiful resources, when local administrations turn out to be relatively poor of funds and resources. The more intensive the cooperation and dialogue between stakeholders and foundations, the more the community is aware of specific issues impacting quality of life and might appreciate the programs offered by foundations to address those issues. With this approach, this also means an increase in trust and contributions from several stakeholders. Social media can, otherwise, support public administrations much more than family foundations, in order to collect opinions and suggestions of citizens and voters. Calls for face-to-face dialogues, meetings, referendum and action can be supported by social media, so that policy-holders can give evidence of engagement and support of communities during meetings with family boards. Most of these foundations are concerned about education, from schools to universities. Culture and creativity, they are included into projects and partnerships with local administrations and museums, local and national heritages (Kaiser H. J.). Partnerships and alliances may include other foundations like corporate, community or independent ones.

With the highest contributions, net gain and non-family board, Cluster 3 Grant Collector and Maker not only for community is committed not only to the local community. The main difference with Cluster 1 is the composition of revenues and the non-family identity. This cluster includes the biggest family foundations, whose main contributors are trusts, family members and corporations. Public grants may be matched with private contributions for local programs and revenues can include program service revenues for foundations, whose buildings are house museums and they are 'story-tellers' of the legacy and the founder (Walt Disney, for example). Social media support the website of the main organization, while websites of trusts and any lateral and matching organization like another foundation or club is echoing projects of the family foundation. In this sort of 'holding', cross-linking among websites (public administrations included) can amplify the commitment of these foundations on world issues. At the same time, social media are well developed and monitored in order to update and supply interim results about ongoing projects and new calls. Relationship marketing is here meant as relationship fundraising, focused on donocentrism, that allows foundations to put the family and other donors at the hearth of communications in order to

enhance the advocacy of supporters and make them feel connected with beneficiaries, both in the community and out of the community for international projects. Like in Cluster 1, cultural policies are here committing family foundations for local and national projects. Out of the State, policies are less binding than agreements and pooling of resources among multiple stakeholders. Some foundations of this cluster are emblematic for their role for culture. For example, the specific and primary purpose of the Walt Disney Family Foundation is to assemble material, study, teach and preserve, and publish and display material appropriate to communicate the vision and legacy of Walt Disney within a historical and cultural context. The Walt Disney Family Museum, Inc. ("WDFM"), is a charitable organization which owns and operates the Walt Disney Family Museum ("the Museum"). The two entities are closely related through common purposes, shared facilities and management, and common control of the two entities' boards. They work closely together to preserve, enhance and display the collection of art and historical items related to their missions and to ensure the continued maintenance and operation of the Museum and related educational and public programs for a broad spectrum of bay area youth and adults, while museum visitors come from across the country and beyond. For McLaughlin Foundation connections with local (both for education and culture) policies is emphasized in projects for schools of arts, theatres and several nonprofit organizations, whose boards connect for local and primary issues.

5. Conclusions

These times are 'hard times' when resources are scarce for 'good causes' and expectations of fundraisers and grantees must perfectly match, in order to manage with issues and insufficient resources at the best in a very competitive landscape. Effective community-change efforts call for a more expansive vision of the role of philanthropy of different foundations and US family foundations are delivering their efforts with the binding commitment of a founder and a legacy, no other foundations can afford and count for reputation and empathy with communities and stakeholders. Trust is here strategic in order to connect multiple goals and stakeholders. Stakeholders can include citizens, administrations of different hierarchies (from local to area, from county, to State, from State to international), other grant-collectors and other grant-makers like foundations, trusts, clubs, associations, international organizations and other nonprofits (Figure 1). Pooling, matching and leading resources, they can result in partnerships, where roles are divided and compromised and whose staff can be differently engaged in communication, when social media can support communication.

The cluster analysis of the sample allowed to profile three significant clusters. Grant-making can mainly refer to communities, while traditional and face-to-face communication is prevailing, though

stakeholders can be different and multiple and relationship marketing is adapting to these suppliers, customers, local administrations, family, boards and staffs. For the biggest foundations, whose projects cross boundaries of communities, relationship marketing and communication are amplified for intensity, variety of media, efforts and time-consumption. The more intensive the cooperation and dialogue between stakeholders and foundations, the more the community is aware of specific issues impacting quality of life and might appreciate the programs offered by foundations to address those issues. The more intensive the partnership with multiple stakeholders on international issues, the more the international audience is aware of roles and efficiency of family foundations, whose reputation can increase next to the crowding-in of stakeholders around programs and projects they are leading. Welfare policies as well as cultural policies can enhance cooperation, trust and available funds. For local goals and urgencies, policies can activate original crowdfunding and stable connections for future collaboration. For national and international calls, policies can give roles to international cooperators of upper-national hierarchy.

Traditionally, the public, private, and philanthropic sectors each play different roles in funding communities and today they often collaborate. The public sector generally funds direct programs, usually oriented toward economic and social development. The private sector invests when the ultimate profit for them is clear or when incentives cover costs. In most cases, it is foundations – almost exclusively – that support community planning, community building and community development. Strong of connections with families and stakeholders, US family foundation funding has been particularly indispensable to build community capacity, a first step in helping communities and strengthen their ability to interact effectively with public- and private-sectors. As they recall the legacy of founders, who were citizens of the same communities, family foundations are now becoming leaders of not-for-profit local initiatives, as they commit themselves to improve the local community's well-being in meaningful and measurable ways so that they play the role of a fundamental and subsidiary Private Welfare State.

Education and culture (and creativity) are among issues, these foundations deliver grants to, while they connect their strategies as Private Welfare State with policies of the Public Welfare State, from local to national policies. The co-created value involves engagement from bottom (communities) to leaders at community and not-community level. Culture is here including heritages, museums, theatres, visual and performing arts. This culture sometimes refers to the heritage of the founder (like house museum). This heritage is not meant as lonely and original attractions in a city, area or quarter, Family boards can connect this heritage to education programs and tours with other heritages in the same area. Community engagement is here granted by policies and marketing of the owner (the family board), For visitors, who are coming from outside (not residents), their engagement is granted by marketing of the family foundation.

Sometimes, the engagement of the members of the boards of the foundations working in the museum/cultural area with their audiences and communities remains scarce and this is mainly due to the little diversity in representation inside the boards themselves. Some other times, family foundations are perfectly integrated with empowered audiences and communities and they are continually recalibrating their giving after increasing their payout rate (i.e., the amount they distribute for charitable purposes as a share of their assets), during the depths of the extraordinary features of (today's pandemic) crisis. Policies of local administrations are here driving all local grant-makers (including family foundations) for focus and commitments on primary projects. The selection of calls must concentrate resources on health. Nevertheless, next to health, education and culture, they are not abandoned, as a driver out of crisis.

As the cluster analysis profiled, the philanthropic role of the sample is unquestionable not only for US communities. The biggest family foundations are coping with more than community needs and issues.

Most of these foundations are using only the website to communicate externally can be considerate the ground zero of a social media strategy: it is still a top-down approach and give little visibility to activities and projects. The choice not to use social media could derive from a desire to focus attention on institutional communication with communities for local issues and projects to be discussed face-to-face with intermediary roles of public administrations, who sometimes get in on with the role of leaders. In previous researches about US grant-making foundations, some of them revealed a wider range of communication tools and they were much more versatile and updated with social media opportunities (Esposito, Besana, 2018; Besana, Esposito, 2016) than family ones, whose choice could be connected to the focus on day-by-day dialogue with and within communities, thanks to family boards and, above all, staffs in quarters, meeting rooms and public buildings where grantees, citizens any other stakeholders may be collected and pay attention to community goals and their needs for matching-grants. It has also been discussed that social media might not be activated by family foundations, but they are activated by citizens, public administrations and targets of grants, themselves. The here investigated sample shows versatile and different efforts with social-media and the engagement ladder social media can provide. Influencers and inspired social media planners can be outside of family boards and staffs, but they can easily connect with family boards in multiple ways, apart of social media.

The very next research will include analysis of relationship marketing with specific suppliers and customers: from international friends and friends' clubs for world projects to customers like micro-communities with quarters, looking for specific replies to specific problems. At the same times, benchmarks of partnerships of different stakeholders, both public and private ones, both US and

international ones, they may be given evidence, in order to suggest a philanthropy value chain within different geographical boundaries. Social media might be investigated for their efforts to collect funds, much more than to simply deliver likes. The implication of clicktivism might be paid attention, in order to avoid foundations of redundancy and helplessness of some communication via social media.

Macro-efficiency, micro-efficiency and incentives of both (local) administrations and not-for-profit organizations in public-private partnerships should be investigated next to policies. Policies should seek, in hard times, to avoid distortions (macro-efficiency) and support the growth of philanthropy, the will to give and the co-created value. Policies should ensure the efficient division of total resources between different Welfare States, providing for local areas and community welfares (micro-efficiency) or for national and worldwide issues (macro-efficiency). Especially, the advocacy for local needs and the professional up-grading of the staff of foundations should be supported by policies at the micro level, with integration of non-family and community empowerment, when suitable. Representatives of communities might compromise the identity of the family. Nevertheless, these representatives might suggest and balance issues and projects to be fund-given, as echoes of their communities, areas and quarters. Their roles may be matched with next-generation leaders of family foundations, with younger family members to be more saying in the operations and giving decisions. The generational dynamics will always foster and help these foundations to meet and cope with contemporary and urgent issues. Technology and social media will be part of this dynamics, collecting efforts and resources for upgrading and benchmarking of projects. As a consequence, at the macro level, policies should minimize adverse effects and provide (fiscal) incentives for family and any other grant-making foundations, whose growth can grant subsidiary roles of utmost importance.

REFERENCES

- BAINE-SMITH, M, MIZRAHI, T., MARCIA, M. (2008) Interdisciplinary Community Collaboration: Perspectives of Community Practitioners on Successful Strategies. *Journal of Community Practice*, 16(3), 249-269.
- BALSER, D., & MCCLUSKY, J.(2005) Managing stakeholder relationships and nonprofit organization effectiveness. *Nonprofit Management and Leadership*, 15(3), 295–315.
- BERRY, L. L. (1983) Relationship marketing, in Berry, L. L., Shostack G. L., & Upah G. D. (Eds), *Emerging Perspectives on Service Marketing*. American Marketing Association: Chicago.
- BESANA, A., & ESPOSITO, A. (2016) Sense and sensibility in the contemporary generous society. Economics and social media communication in the biggest grant-making foundations. *Social Business*, 6(4), 355-375.

- CHO, M., DE MOYA, M. (2016) Empowerment as a Key Construct for Understanding Corporate Community Engagement. *International Journal of Strategic Communication*, 10(4), 272-288.
- COMMAND, M., & MERSEREAU, D. S. (2001) Community foundation marketing, in Walkenhorst, P. (Ed.), *Building philanthropic and social capital: The work of community foundations*. Gütersloh, Germany: Bertelsmann Foundation.
- ESPOSITO, A., & BESANA, A. (2018) US community foundations: building a generous society in challenging times. *Journal of Nonprofit and Public Sector Marketing*, 1-28.
- HALL, M. (2006) Corporate Philanthropy and Corporate Community Relations: Measuring Relationship Building Result. *Journal of Public Relations Research*, 18(1), 1-21.
- HALLAHAN, K., HOLTZHAUSEN, D., & VAN RULER, B., VERČIČ, D., & SRIRAMESH, K. (2007) Defining strategic communication. *International Journal of Strategic Communication*, 1, 3-35.
- HARROW, J., JUNG, T. (2011) Philanthropy is dead. Long live philanthropy?. *Public Management Review: Special Issue: Special issue on philanthropy and public policy*, 13(8), 1047-1056.
- KIM, M. (2017) The relationship of nonprofits' financial health to program outcomes: Empirical evidence from nonprofit arts organizations. *Nonprofit and Voluntary Sector Quarterly*, 46(3), 1–24.
- KOTLER, P., & ANDREASEN A. R.(2020) *Strategic Marketing for Non-Profit Organizations*, New Jersey, Prentice Hall.
- MOORE, M. H. (2000) Managing for Value: Organizational Strategy in For-Profit, Nonprofit, and Governmental Organizations. *Nonprofit and Voluntary Sector Quarterly*, 29(1),:183–204.
- MUSEUM BOARD LEADERSHIP (2017) *A National Report*. American Alliance of Museums BoardSource and Northern Trust: <https://www.aam-us.org/2018/01/19/museum-board-leadership-2017-a-national-report/> Accessed 25/05/2020
- NATIONAL CENTER FOR FAMILY PHILANTHROPY (2020) *Trends 2020*. Bank of America: <https://www.ncfp.org/event/new-trends-research-findings-from-ncfpps-second-family-philanthropy-study/> Accessed 26/04/2020
- PARK, J, CAMPBELL, J M. (2018) U.S. Small Business's Philanthropic Contribution to Local Community: Stakeholder Salience and Social Identity Perspectives. *Journal of Nonprofit & Public Sector Marketing*, 30(3), 317-342.
- SARGEANT, A. (2009) *Marketing management for nonprofit organizations*. Oxford University: Oxford.
- SARGEANT, A., & SHANG, L. (2017) *Fundraising principle*, Wiley online Book. available at: <http://dx.doi.org/10.1002/9781119228974>

In uncertain times. Confidence, Cohesion and Security.

Donostia cultural policies for Covid-19

Imanol Galdos Irazabal
Donostia Kultura, Basque Country
imanol_galdos@donostia.eus

ABSTRACT

The article addresses from the local perspective of San Sebastian (Basque Country) the response that the institutions responsible for the management of cultural policy and the whole cultural sector articulated with the unexpected arrival of the Covid-19. It was characterized by its speed, transparency in communication and willingness to respond to the diversity of needs and demands of society. In a first phase, which coincides mainly with the confinement, everything revolved around the digital offer. This phase served to experiment with paths that have become the new normal. Once the confinement phase was over, and coinciding with the summer season and the celebration of major cultural events (International Film Festival, Jazzaldia and San Sebastian Musical Fortnight), the decision was made to push forward and hold said events with physical attendance. The post-digital scenario will combine contents of diverse typology but above all it is called to assume a leading and central role in a society that needs certainty, security, relief, empathy, and hope. The thesis that is defended goes through a transversal cultural policy connected to the agendas that arise in the new scenario.

Keywords:

Confidence
Cohesion
Community
Security
Future

ACKNOWLEDGEMENTS

My uncle Jose Luis Galdos who died today for Covid-19. Catholic priest who served his community in New York (Harlem, Bronx and Lower East Side Manhattan), Bilbao and Madrid. In the midst of the noise he has gone quietly.

John Bieter, professor at the University of Boise (Idaho) and above all a friend.

Juanjo Alvarez. Director of the Thesis.

The Context

San Sebastián meets a number of conditions to explain the context of the cultural policy that was thought through, decided and implemented with the advent of the pandemic. A medium-sized city (population 186,000), with an enormous cultural tradition, an international venue for cultural festivals, with a community where cultural usage and consumption form an essential part of the dynamics. One example of this is that over 111.000 of its inhabitants are members of Donostia Kultura, the city's leading cultural organisation, the main issue of my presentation.

A cosmopolitan city with a strong tourist vocation, it is home to educational institutions of international renown (Physic Center). Five universities make the city a vital space where knowledge forms a substantial portion of its identity.

This city of knowledge, steeped in culture, has other features which must be pointed out. As in other cities, the ageing of its society calls for priorities to be considered which would otherwise not emerge. Average age is 47, portraying a city which, among other irreplaceable challenges, must address its rejuvenation. But it must also be stated assertively that this is an active, participative and decisive age segment in the city's present.

It must also be noted that, within the large category of citizens over the age of 55, where different categories certainly ought to be established, a general approach could conclude that the reality of the issue is an active, participative age segment 35% of the members of Donostia Kultura are over 55 years old. This is a significant number.

Beyond the nuances, however, although a portion of its society over 55 years old continues to act as a driving force, San Sebastián has not been freed from the obligation to think about how to address the major woes of western society, which the pandemic has aggravated. Loneliness and isolation ("The Political Consequences of Loneliness and Isolation during the Pandemic", Masha Gessen, 5 May, The New Yorker).

Culture, ultimately, comes centre stage in an articulation of the city from the multiplicity of perspectives. The perspective of town planning, the economic perspective (contribution to GDP), the social perspective (its contribution to greater cohesion and reconciliation in a society stricken by the consequences of violence and terrorism) – these are a few of the aspects whereby the city has been shaped, by and with culture.

In this context, it should also be said that San Sebastián has kept ahead of events for over three decades, and we could say that its diagnosis was right. Its vision of culture combined the more classic vision (focusing more on artistic expressions) with a social sensitivity that has successfully penetrated the city's districts. Shunning the construction of showy paraphernalia, it laid the foundations of its political culture by creating more modest infrastructures (twenty libraries and more than fifteen cultural centres), helping to create a social and geographic cultural balance.

From this perspective and on this basis, culture in San Sebastián has made its people participate and take an interest in public affairs as a major practice. All the revindications, proposals and theories that political scientists, sociologists or philosophers submit to bolster democracy, open up new avenues to enhance representation or governance have been tested in practice in San Sebastián for decades.

1. KEYS TO THE PANDEMIC AND POST-PANDEMIC POLICY

1. 1. AN IMMEDIATE, TRANSPARENT RESPONSE

Action was taken rapidly and transparently from the outset. On the very day the Central Government decreed the lockdown, on 13 March, the public at large and members of Donostia Kultura (over 111,000 members) were informed of the gravity of the situation and its immediate consequences: closure of all the city's cultural facilities, but there was a further message. Donostia Kultura set to work immediately to provide the public with an offer, more necessary than ever before, to address the harsh times ahead.

With the assistance of a well-equipped Communication Department (not all cultural organisations have their own structure to manage communication policy), communication became the keynote in the day-to-day activities of Donostia Kultura. A cultural policy cannot be reliable if it is not properly explained and credibly understood.

Against a backdrop of isolation and lockdown, rapid transparent communication began to lay the foundations for confident messages amid the seriousness of the situation to be conveyed to the public at large, stricken with fear.

As other organisations and institutions disappeared, heightening the lack of any assistance and support, Donostia Kultura took the decision to maintain the flame of culture, sure of the crucial role it had to play.

Thus, on the basis of a policy of continuous transparent information, Donostia Kultura stood firm, and in a matter of weeks the new culture schedule had been drawn up in accordance with the new scenario that nobody could have foreseen.

The alternative of waiting until the panorama could be clarified could not have produced the climate of confidence that was woven in San Sebastián, particularly during the first harsh moments of lockdown. A more conservative or more calculating approach would not have made it possible, at a later date, after the lockdown, for the city's major summer events, such as the Jazz Festival or the International Film Festival, to be held. Donostia Kultura opened up the path.

1.2. CREATING A NARRATION OF CONFIDENCE AND CERTAINTY

Prior to the sudden, unexpected advent of Covid-19, the world was living in a climate of fear, as described by the American philosopher Martha C. Nussbaum (*The monarchy of fear. A philosopher looks at our political crisis*, 2019). A fear that grips the present and future of our existence. Covid has accelerated a process that is complicated to manage, but possibly the best definition of the times in which we are living all around the world, and not just in the country Nussbaum refers to⁷

"There's a lot of fear around in the US today, and this fear is often mingled with anger, blame and envy. Fear all often blocks rational deliberation, poisons hope, and impedes constructive cooperation for a better future"

This calls for antidotes which can stymie its blocking capacity. It is culture that is best placed to take on this role: it has the best instruments to do so. In this context, Donostia Kultura correctly interpreted the gravity and the exceptional nature of the moment, and above all it undertook the task of conveying messages of confidence and hope. Beyond contents and instruments, what stood out was the forcefulness of the message. Despite all the physical and emotional difficulties, we set to it, and in record time a portion of the cultural schedule, albeit in a different format, was again at the disposal of the public at large.

⁷ NUSSBAUM C. MARTHA (2018) *The Monarchy of fear: A Philosopher Looks at Our Political Crisis*. Oxford. Oxford University Press. Pág 1.

1.3 KEEPING THE COMMUNITY UNITED

In its city (population 186,000), Donostia Kultura represents a genuine photo of it, and of its sociological, generational, economic and political diversity. More than any other organisation, more than 11,000 members reflect the plurality of the community. There can be no doubt this critical mass plays a major role in channelling much needed solidarity, for people to be aware of one another, for mutual empathy, to overcome loneliness and isolation. In a word, to boost links in the community.

By means of a schedule adapted to different demands and necessities, it also served to bypass intergenerational gaps and create common spaces. Cohabitation during the lockdown served to strengthen bonds and complicities. Donostia Kultura was one more milestone on the path to creating a more solidarity-conscious society.

Nor must we forget two contributions which form part of the objectives of culture and its genetics. Firstly, it created channels for participation, the great mantra of all those yearning to overcome today's time of lethargy, apathy, mistrust and lack of credulity concerning the messages being conveyed by public institutions, it finds a natural channel, still incipient through this initiative which, although it was set in motion in exceptional circumstances, was not so much a strategy as emotional, sincere drive.

Moreover, in the absence of any other training tools, it continued to serve as an educational training package to top up the offer of regulated education systems. The important task carried out by the network of Cultural Centres bolstered its role during the period of lockdown.

2. MAIN MILESTONES OF THE SCHEDULE

The schedule was based on two criteria which must be highlighted. Firstly, the determined intention to assist local creators who were obviously experiencing, and continue to experience, manifest difficulties. It was a clear gesture of economic and moral support for one of the mainstays of co-creation. More than one hundred authors (illustrators, storytellers, theatrical actors, video creators) produced over 134 works during the six weeks of lockdown.

The second criterion was the diverse plural design of the offer. Considering that Donostia Kultura covers the entire range of artistic manifestations that might be expected of a comprehensive cultural offer, a huge effort was made to cater for the tastes behind all those forming part of the organisation's universe. Films, theatre, museum exhibitions, music, literature and dance – nothing

was missing from the range. Neither the youngest nor those forming part of the 55+n generation had any grounds to complain of being left out by the Donostia Kultura schedulers.

At the most difficult moments, amid a crisis of historical dimensions, Donostia Kultura boosted its credibility. It gained prestige. But above all, it became a relevant, central focus for the city's population. And it did so with empathy and proximity. Izaro's concert was the festive culmination of a path undertaken in the previous weeks to keep spirits high. There is something which culture can never fail to address but which is ignored in times of bonanza, and has now been retrieved forever; its maximum contribution to the individual and collective emotional balance, and a capital contribution to the vital tone of geographic spaces.

Implementation of radio was another step along the road to broaden and deepen relations among locked down citizens, and to demonstrate mutual support and encouragement.

DKEtxean was the beginning of a path which continues today under the umbrella of Donostia Kultura On!. With an uncertain future stretching out before us, there is no reason to surmise that the digital offer is about to suddenly disappear. All the indications are that it is here to stay, and this must be the focus to improve products, and most particularly to guarantee increasing access for the sectors still excluded.

3. POST-LOCKDOWN

The brave decision, strewn with risk and doubt, to keep the flame alive was a decisive factor in addressing the "new" normality with more security. After lockdown, facilities gradually opened again. Amid strict compliance with health regulations, the climate of confidence, a basic necessity in such difficult times, had already been put to the test and reinforced. The road to recovery became more comfortable and more secure. Donostia Kultura opened up the way forward for other cultural institutions, particularly the major festivals which put San Sebastián on the international stage during the season. The Film Festival, Jazz Festival and Festival Fortnight trio was the main exponent of a positive atmosphere the local people welcomed with open arms. In addition to the Festivals, however, Museums, Theatres, Cultural Centres and Libraries opened their doors again amid the utmost normality.

3.1 BACK TO THE RITUALS

South Korean philosopher Byung-Chul Han warns against the loss of rituals (*The disappearance of rituals*, 2020), and conversely points to their value as a means of bringing about cohesion in the community⁸

“Rituals are symbolic acts. They transmit and represent the values that keep a community cohesive. They generate a community without communication, while the predominant today is communication with no community.”

In this regard, while undertaking the contradictions inherent in the decision to hold such events, never before had there been such a need to win back the spaces which bolster community links year after year. Returning to the spaces where we repeat acts that remind us of our belonging, a form of recognition, in a world suffering from a huge lack of the symbolic (Byung-Chul Han, 2020).

No voices have emerged to discuss the appropriateness of the measure adopted, with particular emphasis on the absence of exemplarity surrounding this decision in a context of restrictions and sacrifices. The responsibility of institutions in management of these events has cast doubt on the coherence of the narration, and the credibility of the messages conveyed to the general public by those in charge of the institutions.

Another perspective, however, could be added to this reproach. In these times of maximum uncertainty, what we are calling for is leadership, a clear position, and no harmful ambiguities. This paradigm we yearn for, however, entails risks that may lead to errors and failure. But with no risks, paralysis may induce a permanent paralysis in us, and deepen the fear now stalking the world.

In this regard, there can be no underestimating the fact that the proper holding of cultural events during the summer helped people win back their spirit, their optimism and morale. Facing what were likely to be a problematic autumn and winter, we had to take up energy and take in stocks. A lacklustre summer would have deepened the emotional problems attacking our societies.

Meeting up again with our friends in the cultural spaces that form part of our identity and our habits has given us back a certain amount of momentary normality, as we wait for better times ahead. Transitions are necessary, with the risk of errors.

⁸HAN BYUNG-CHUL (2020) *La desaparición de los rituales*. Barcelona. Herder. Pág 11.

3.2. THE POSITIVE TREND PERSISTS

Having overcome the summer, autumn (coinciding with the resurgence of the second or third wave of the coronavirus), the real acid test is now upon us. Two different phases have now been covered. The first, which largely coincided with the lockdown, served to revindicate the role of culture at a time of maximum urgency and gravity. By way of a response to the scepticism and the irrelevant role allocated to culture (when the crisis commenced in San Sebastián and the crisis cabinet was set up, the initial reaction was to relegate culture to an insignificant role). Insistence and indisputable proof that, in this crisis, apart from money and other inescapable urgencies, there were other emotional aspects which should not be forsaken, and this gave culture an essential role.

The second phase coincided with summer, with all its connotations. A mild climatology and the anxiety to recoup the sensations of a previous life were instrumental in creating an optimistic environment we yearned and sighed for. The range of culture festivals has propped up a period in which emotion has helped us overcome the adversity of the moments we are going through.

Although it is too early to draw any final conclusions, the first significant data on the desire of the people of San Sebastián to take on the years 2021 and 2022 are positive. Over 800 popular courses at the eleven culture centres have now attracted almost five thousand of the local population.

Registrations are down, it is true (6,500 in 2019/2020), which might be expected in the circumstances. But the fact that 5,000 citizens are prepared to actually go to training courses as part of an extensive offer clearly shows the need we have to not be cooped up at home; the need to share what we have been through and our experiences if we are to continue to progress within an infinite learning process.

In this context, one item of information must be mentioned. Amid a significant decrease in sporting facilities and events available alongside the cultural offer, culture has stood firm and has remained healthy.

We might submit the hypothesis that, thanks to proper communication and the credibility gained with practice a climate of positive confidence was created whereby active participation in culture comes out on top. Overcoming initial scepticism and the doubts conveyed by those responsible for managing the pandemic, and the message of the relevance of its role has gained increasing

credibility, and the pedagogy rolled out over the health safety it offers (beyond other environments) has had an effect, and this explains its growing protagonism.

4. THE MOST IMMEDIATE FUTURE: CHALLENGES AND OPPORTUNITIES

The first reflection stems from this. Can we talk of a post-digital policy? Even though it may be premature and too adventurous to delimit a period of time that is still a hypothesis, it has been some time since the conditions were right for a reflection which, in a time of bonanza, stability and normality, would not have emerged.

First and foremost, the doubts and uncertainties that assail us allow us to roundly affirm the periodisation of the times. There was a time when planning and systematisation followed parameters that adhered to logic, and practice based on experience. With the sudden advent of the pandemic, a new paradigm has emerged that still throws up many unknown factors.

When the crisis began, we behaved in accordance with the classic paradigm, and in this context we set out a number of timelines that had to be met. Possibly due to our desires and haste, programme in hand, or almost, we first established dates to situate the digital period of digital policy, and subsequently, after the crisis, we would return to the post-digital phase. A return to the past, in other words.

Far from coming true, however, forecasts are now beginning to enter an unknown terrain, full of uncertainty, filling us with unease. In this regard, instead of complaining and remaining the prisoners of nostalgia, there must be a change in our way of addressing the new scenario. Rather than trace out temporary borders and borders of another sign, our main task is to furnish the most effective response possible to the new demands and needs of citizens.

The months of lockdown and the initial phase of the pandemic showed us the path that is opening up to the most immediate future. Digitalisation alone is no substitute for the emotional needs we have as human beings. It is far from a comprehensive solution for the present deficiencies. Its chiefly technical formulation covers a number of aspects that our existence demands, but not all of them. It would also seem obvious that technology has provided us with unexplored possibilities, and that this has created a certain rigidity of culture.

Without falling into any equidistance, it would seem that reality is inviting us to think of a scenario with an eminently natural mixture of digital and physical proposals. There is no incompatibility that demands a stance to be taken for one option or another.

In this regard, to talk of post-digitalisation even though digitalisation is not a complete reality is premature. Digitalisation has opened new doors, it is exploring paths previously untrodden, and has opened up processes of reflection never heard of before. As in other environments, there were signs of exhaustion, of the end of a cycle, and of the need for a rethink of cultural policies.

One example is the organisation in which I work. Donostia Kultura turns thirty this year and the anniversary was almost calling for a refoundation. After a successful cycle of continuous growth, the script was demanding a shutdown. Circumstances changed, and when we had initiated a process of reflection, along came Covid to step up the pace of something we had shyly embarked upon.

This, therefore, is a unique opportunity, which we neither expected nor asked for, but which places us before the mirror we used to shun with some discomfort. Any process of reflection requires a certain amount of self-criticism and, above all, the firm desire to leave the comfort zone. Obligated by circumstances, the task is now irreplaceable.

5. AMBITION TO OVERCOME THE BARRIERS. CULTURE BEYOND BARRIERS

The prospective task of imagining the post-digital scenario would, first and foremost, call for the serenity that is missing from these convulsed, chaotic times. It is no secret, it is evidence, that the extreme polarisation and tension which characterise western societies prevent dialogue and debate. We have become autistic, the absence of any empathy cries out, and all we do is bow to the dictate of the tribe. Fanaticism creates too much noise and throws up multiple barriers to prevent freedom of expression and thought in channels of normality and respect. Discrepancy and plurality, find it so difficult to form part of a common system of values.

Aware of the fact that the general framework nowadays is the main stumbling block, culture and its policies now have the opportunity to lead the process.

It has the proper instruments to head up a process that needs and calls on people and institutions that are willing to open up paths and undertake the uncomfortable. This, however, means that culture must go beyond its traditional limits. It must raise its gaze and

understand that its mission at this point in time is not limited to cultural offers, or the organisation of cultural events and activities. In other words, it is time to start worrying about issues which it felt did not concern it, and which it observed with a mixture of distance and disdain. Time to roll up its sleeves.

5.1 FACILITATOR, MEDIATOR AND CONCILIATOR

In a time in which hundreds and thousands of barriers and frontiers, both geographic and mental, cultural policies must take a look at all the underlying factors, and above all they must strive to analyse the reasons why these things happen. Culture beyond barriers is the philosophy that summarises one of the major tasks that culture must open up in this new scenario.

The huge gap which, for example, has opened worldwide between the city and the country, is threatening to do away with the necessary co-existence and stability that society needs. Two irreconcilable worlds have been created which increasingly know less about each other and hate each other more. This has led to a narration of winners and losers, where the humiliation, discreditation and stigmatisation of villagers accentuate their fears, resentment and hatred of the city. Elections clearly express the abyss that has been created between two increasingly irreconcilable worlds.

The devastation of empty villages and provinces, a phenomenon that is being repeated in all countries, is having terrible consequences in terms of territorial equilibriums and many other aspects, including emotional aspects.

This, therefore, is one of the tasks which culture ought to undertake in the post-digital period. Overcoming the urban vision and in an elitist sense, culture (it is one of the perceptions that certain sectors of society maintain on certain attitudes which emanate from cultural policies) now, like never before, has the chance to widen borders and contribute suggestive ideas and narrations of hope for territories where sadness, tedium, hopelessness and desperation can do away with a portion of our identity. Therefore, territorial cohesion must be one of so many tasks to be included in a new agenda. It is not so much the organisation of concerts or plays, an offer lacking in rural areas, which ought to become one of the priorities of cultural policies devised from the city. The new phase entails undertaking a new paradigm where, beyond the mere accumulation of events, a look is taken at other kinds of aspects.

Along with territorial cohesion, a huge warhorse, social cohesion should also be one of the major priorities of cultural policies. Although implicit in this, ahead lie times of much difficulty, with broken consensuses and bridges. Amid rampant inequality, with the risk of fractures that are not only territorial, which can lead to undesirable scenarios, the rebuilding of bridges must form part of the unavoidable tasks on the new post-digital agenda.

The case of San Sebastián and, by extension, the Basque Country, explains the role that may be played by culture as an instrument to facilitate co-existence. Prior to the peace and welfare we now enjoy there was much suffering, our co-existence was ruptured over a long period of time, there was fear, there was death, society was divided, families and friends were divided, in many cases irreconcilably.

Although there were many factors and elements which helped us through the difficult 80s and 90s of the last century, the unequivocal focus by institutions, agents and private organisations, the effort that was made and still is being made by society for culture explains, to a large extent, the recovery of co-existence in San Sebastián and the transformation of the city. Culture is the central factor of a successful process, and will also serve to address the new challenges faced by San Sebastián, and other cities. Many and diverse challenges, tremendously complex, in which culture must play a relevant, central role. In the difficult times, when co-existence broke down, culture came centre stage, and in this regard the San Sebastián model taught us some powerful lessons that can apply to another scenario never seen before, with another typology of social fractures, where similar formulas may be adopted.

As another historic cycle begins, the pandemic has opened up wounds that were not totally healed, and now they are opening up with greater virulence. In some cases, sectors are emerging which require palliative care (a large portion of creators); sectors which are now experiencing inclement times and interpret their situation from the perspective of redress with respect to other situations. Culture must, therefore, undertake a role of enormous value, irreplaceable, that of weaving complicities.

5.2. ENCOURAGEMENT AND EMPATHY

Although its task will not be understood from the standpoint of care or health, the new scenario will require large measures of empathy, and in this context, culture must play a central role. Recent events show us the gratitude expressed by people when empathy occupies the central channel in leadership. Hatred and resentment gain immediate, partial, and fanatic followers, but cannot offer

any lasting, effective and viable solutions. Without leadership, empathy is now the main feature. The best encouragement and the best medicine.

The long term requires more time. It is less spectacular, less noisy and showy, but it guarantees the solidity of the objectives marked out. In the current circumstances, maturity and moderation must avoid obstacles and interests which want positions to polarise further.

From multiple realities that can be analysed, we observe that the humiliation which some sectors feel intimately and which lead them to embrace the blame game with those they consider are responsible for their dramatic situation. This rebellion against elites who are seen as distant and arrogant is the cause of many of the problems affecting societies all around the world.

Although this requires a deeper analysis, and the nuances are essential, it could well be that resentment can blame certain attitudes and manifestations emanating from culture. Culture as the battering ram of the elites which are causing the suffering is a hasty reading.

In this context, therefore, the opportunity emerges to clear up any doubts and demonstrate empathy and proximity in an environment that must always guarantee hope. Clarity against noise and confusion. Culture is an agent of transformation, it is its essence, and without this it loses its meaning. It must be part of the solution, and must do away with any suspicions there may be concerning its role.

Empathy must also be based on tangible facts that breach the threshold of moral support. The enormous difficulties and tragedies that have befallen cultural creators call for measures and programmes which, in addition to providing an immediate response to the serious problems they are suffering, must also serve as a prelude to a new kind of co-governance for culture.

In many of the models, and San Sebastián is an example of this, the considerable weight of the public sector in cultural policies has been part of the debate and the reflections. In the context of the need to encourage the general public to take part in public affairs, the risk has been pointed out that the amalgamation of resources and structures supporting the public sector could suffocate the need for any complementary action by civil society. As public authorities have taken up spaces and roles which historically arose from the initiative of society itself, a model has emerged which in certain circumstances is close to the exclusivity of management, covering almost all of the initiative and responsibility for action. This is not a healthy model because the facts show that this creates passivity and disinterest in common issues; it creates mistrust and distance.

In these circumstances, although the scenario was not that intended, the conditions are right to start into restructuring the model. First and foremost, there must be compensation between the two poles, as the current imbalance punishes, grinds down and acts against everything that emerges from private or social initiative, with all the nuances the terms require. A bureaucratized structure that does not receive the inputs and energy that emanate from the base of society has the risk that when it calls for involvement and commitment no one will heed the call of those who for a long time were neglected and moved away from real concerns. We must do away with the format of seeing competitors in a market which, apart from the parameters of any market, and it must cater for more human concerns. The solidarity called for today, far from reasons of charity, must be based on parameters of profitability, sustainability and effectiveness. It is, therefore, a good time to rethink the cultural policies that were carried through in the times of bonanza. Anything which targets a new model for more implication in the processes of co-creation of institutions, citizens and creators will serve to overcome the many barriers at present.

5.3 AGENT OF TRANSFORMATION

Some of the reasons can explain a certain amount of distance from the essence of its *raison d'être*. The politically correct, as part and parcel of decision-making spheres, has made gains where other elements have not. A recovery of freshness, courage in proposals and rebellion are some of the starting points reconstruction of the new narrative. Back to the origins, it could be said.

Prior to the advent of Covid-19, the challenges that we were accumulating as a society placed us in a new paradigm calling for answers to questions that had never been asked before. The erosion of democracy, the exponential increase of inequality, the gradual disappearance of the middle class in many countries (the middle class that has been the mainstay of some societies since the end of the second world war, and the class that has arrived in emerging countries), the crisis of the welfare society and the need to rethink it, the end of social ascent, and many other problems were filling the academic offices of sociologists, political scientists or economists.

There can be no doubt that culture cannot undertake a role that exceeds its potential. Nor should its contribution at a decisive moment be sneered at. I am returning to the model I know best, which has demonstrated its validity, even at difficult times.

Despite San Sebastian's characteristics as a tourist city and seat of aristocracies and bourgeoisies, in its beginnings it turned to manifestations of a recreational nature. Although somewhat elitist, very much focused on the seasonal and summer profile. Thirty years ago, however, it turned to another

direction where systematization, planning and resources marked the new course that in these difficult moments has become the solid instrument capable of responding with solvency to a critical situation.

Instead of majestic buildings, and starting to build top down, we opted for infrastructure connected to the street; attentive to the reality, demands and concerns of the citizens; receptive and channeling the proposals of the citizens.

Culture has been the central pathway that has brought institutions and citizens closer together; it has made it possible for citizens to be educated, to internalize diversity and open-mindedness and to practice shared governance; it has allowed citizens to put into practice those aspects that today occupy and concern the agendas and projects of local institutions, all in search of the recipe that awakens and motivates citizens to participate in public affairs. In San Sebastian it has been demonstrated, in short, that governance, far from being a theoretical-academic concept, is executable, invaluable and tangible.

Street-level cultural policy has made it possible for citizens to get to know each other better; it has made it possible for citizens from different backgrounds, traditions and social, political and cultural strata to meet. It has made possible a permanent, dynamic and practical interaction. It has made it possible for institutions to get closer to citizens, to listen, to receive classes in realism and to learn to act with humility.

The voices that are eager to promote the participation of a citizenry that is skeptical, distrustful and distant from the spaces of management of affairs that concern everyone is unable to overcome the radical distrust that has taken root in broad and diverse layers of society. The pandemic has accelerated a process that cannot find a way to redirect itself towards a tone when credibility is lost.

The attempts are reduced to procedural processes and instruments, highly bureaucratized and that to a certain extent are perceived as being put in place in an artificial way and somehow forced by an unsustainable situation. They do not, however, arouse the degree of enthusiasm necessary to overcome a very broken, irritated state of mind, unwilling to embrace the will of the people.

Culture is the instrument capable of facing challenges of historical dimensions. However to do so, authority must be give credibility; the coherence of a long-term path with no room for mere headlines. This is the path that San Sebastian has followed for decades and that in these moments of crisis has allowed it to become a reference and a lighthouse that others have not been able to duplicate.

San Sebastian has shown and continues to show a remarkable cultural ambition. When today symptoms of a loss of political support in culture and its relevance appear, San Sebastian clearly shows that it is the path to follow.

If not in its entirety, the progressive recovery of cohesion and harmony that was taking place in San Sebastian could not be understood in any way without taking into account the clear political and social commitment that has been made in San Sebastian for decades. Now, once again, its solvency is being put to the test in these times.

San Sebastian's cultural model clearly shows us that long-term commitments, although less spectacular are what guarantees solidity in achieving the set objectives. In the face of the prevailing uncertainty San Sebastian continues to push forward.

In this context, today it is once again necessary to listen intelligently to the vertiginous changes of every order that are taking place and from this perspective, culture is the most valid instrument that we have, as long as we act from relevance and centrality.

6. CONCLUSION: MORE THAN EVER IT BETS ON CULTURE

For some time we had been reflecting on how to respond to scenarios that had come to stay; scenarios that in many cases came about without warning, abruptly and vertiginously. All of this has prevented us from digesting the situation calmly. Covid complicates even more the digestion and accelerates the need not to delay in unproductive disquisitions.

In any case, we are obliged to respond to scenarios that have nothing to do with the past. In this sense, the evidence that answers from the past are useless is only a statement. The complexity of our societies requires us to move away from simple and hackneyed schemes that could only serve to gain time.

The resounding fall of all kinds of references, the confusion we are living through, the radicalization and extreme polarization that today characterize practically all world societies, the populist formulations, the return to national borders and the closing of external contributions force us to redouble our efforts on the path of joining forces from a premium of personal and international solidarity.

The example of San Sebastian, however, shows that it is in critical moments that efforts must be redoubled to act from two complementary perspectives. Immediate and empathetic responses on the one hand, along with making long term decisions. On occasions, the world of culture has chosen to respond to questions of unusual complexity from liquid, superficial, aesthetic postulates

of little commitment that barely achieve and ensure the impact and relevance that the tone and dimension of current problems and challenges require.

Trying to get out of taking positions to avoid discomfort has only served to persevere in the irrelevance of culture. To each speculative position will be added a new step in the loss of influence of culture on society. The harshness of the moment demands that we take risks and show a clear disposition to bear our mistakes.

The challenges are certainly immense. With the peculiarities of each continent, this should never be forgotten, but some of the problems that overwhelm the world societies (Europe, Japan and United States to a greater degree) force us to think about solutions of the same rank.

San Sebastian suffers, for example, in that it has the same demographic crisis as Japan and Italy. A crisis that has left the arrival Covid is evident. It is possibly the main priority that San Sebastian (a city with an average age of 47) must face immediately if it does not want to put its own survival at risk.

The question that arises and the one that is still not properly internalized by broad sectors of culture is about its role in matters that in theory do not correspond to it. A grave and immense error that should be corrected immediately.

There is no doubt that it does not fall within its direct remit to manage those policies that serve to address a problem that may jeopardize many of the structures (culture itself, without going too far) that sustain our societies today.

The role of culture is different. It is to serve as a guide, a channel and a proposal and reflection on each of the issues that beset us. The pathway to which I referred earlier. The platform from which the proposals and solutions must start. Never moving away and ignoring the problems that surround us. From the periphery we can hardly be influential.

The list of disaffections is long, no doubt. The skepticism with which broad strata of society observe and judge politics today (more necessary than ever) must be confronted more radically and solidly, and in a more compact and coherent manner than ever before. Here culture has in its hands all the elements necessary to propose a new emotional story that is suggestive and attractive.

We are definitively facing another society with other priorities and values that come to replace those that have guided our lives for decades. A fierce individualism that is taking away deep-rooted community traditions as sociologists of the stature of Robert Putnam remind us. The generational

gaps that are found around the world; the gaps between urban and non-urban areas; the depopulation and emptying of entire territories; the inequalities that appear even in those societies (Chile is the latest example) where their eradication has apparently been successfully managed.

The order of values has been truncated in such a way that today our priorities of yesteryear (stability in work as a supreme value or family stability) sound like true anachronisms to the millions of millennials who observe with undisguised indifference what is proposed from distant scenarios. Frequently, there is a lack of empathy, and sometimes there is too much arrogance, and culture must begin to give an example of the uselessness of these attitudes.

Culture has before it an enormous opportunity to lead a historical process. The model of San Sebastian shows valid lessons. Without entering into comparisons but there is no doubt about the seriousness of a scenario that has broken and fractured, society. Yet, it was with courage without foreseeing the scenario of stability that the city was savoring until the arrival of the Covid.

There are neither magic recipes nor simple solutions to highly complex problems. Nevertheless, in the enormous difficulties in which we move culture is a great antidote that can manage from a cross-sectional perception of the great challenges of diverse characterization that challenge us. The demographic, economic, social, climatic and political challenges need more than ever a framework that offers encouragement, peace, cohesion and stability. In this context, the future requires a convincing, attractive and powerful emotional narrative. The future will also be played out in this area, as well as guaranteeing the most pressing needs, which in many parts of the world are still distant utopias.

Culture, alone, is capable of articulating this emotional story that will help us with the other challenges we must face. San Sebastian has amply demonstrated that their actions were correct and that since the arrival of the Covid it has been strongly vindicated. Now, more than ever, it is time to act with clarity and forcefulness, to avoid confusion and ambiguity. It is time to reinvent ourselves. It is urgent to articulate a new narrative for the coming decades and for this our greatest instrument will once again be culture.

The post-digital scenario will incorporate instruments that have appeared in the digital phase in an improvised way. That being said, they will never be the complete answer to our emotional demands as part of a community that we have moved away from because of a lethal virus.

REFERENCES

- GESSEN, MASHA (2020) *The Political consequences of Loneliness and Isolation during the Pandemic*. New Yorker. May 5
- NUSSBAUM C. MARTHA (2018) *The Monarchy of fear: A Philosopher Looks at Our Political Crisis*. Oxford. Oxford University Press.
- NUSSBAUM C. MARTHA (2019) *La monarquía del miedo. Una mirada filosófica a la crisis política actual*. Barcelona. Paidós.
- NUSSBAUM C. MARTHA (2019) *The cosmopolitan tradition. A noble but flawed ideal*. Cambridge Massachusetts. Harvard University Press.
- HAN BYUNG-CHUL (2020), *The disappearance of Rituals*. Cambridge. Polity Press
- HAN BYUNG-CHUL (2020) *La desaparición de los rituales*. Barcelona. Herder.
- HAN BYUNG-CHUL (2015) *The burnout society*. Stanford. Stanford University Press.
- HAN BYUNG-CHUL (2019) *La sociedad de la transparencia*. Barcelona. Herder.
- HAN BYUNG-CHUL (2019) *Buen entretenimiento*. Barcelona. Herder.
- HAN BYUNG-CHUL (2018) *The expulsion of the order*. Cambridge. Polity Press.
- HAN BYUNG-CHUL (2018) *Hiperculturalidad*. Barcelona. Herder.
- HAN BYUNG-CHUL (2020) *En el enjambre*. Barcelona. Herder.

Theatre memories in a digital realm:

Cultural leadership and memory narratives

Milena Dragičević Šešić

Faculty of Drama Arts, University of Arts, Serbia
msesic@gmail.com

Milena Stefanović

Independent Researcher, Serbia
projectmilena@gmail.com

ABSTRACT

The pandemic showed that theatres will be adapting, re-positioning and re-focusing their work through digital means and by using diverse social media tools, in order to stay present and active during the period which will be limiting their models of traditional production and existence. The research explores the rationale behind so called “pandemic production”, digital narratives and main approaches of managers and leaders in the public theatres during the pandemic phase, while noting the lack of cultural policy leadership. Institutions managers role was of most importance and the pace of adaptation depended on their skills. For all stakeholders, new reality caused by the pandemic opened the horizons of ethics and aesthetics of solidarity, care and critical reflections within theatres, while cultural policy makers choose to act as bureaucrats, missing the opportunity to step in with more vision and leadership, which lead to downgrading their role to pure administration.

Keywords:

institutional memory, leadership, memory policy, digital memory collection, digital institutional collection

Introduction

The COVID-19 crises disclosed many different aspects of theatre management, especially the relevance and importance of digital collections. This can be said for all cultural institutions, Galleries, Libraries, Archives, Museums (GLAM), Music Halls, Theatres, but even for festivals and different type of manifestations, that could find its way of operation using those collections in the changed cultural realm during the pandemic. Festivals could offer to its audiences an overview of the past editions, recordings of events, interviews with actors and critics, documentaries⁹, but also some new digital products, created during pandemic, that would complement existing collections and give at least part of the illusion that “the new edition” exists. GLAM institutions were in the heart of public attention, media and audiences developed expectations of exploring its resources in a digital realm (Dragičević Šešić & Stefanović 2020, in print). Thus, the institutions and organizations who had policies regarding digital memory and archive practices, were among the first to offer to the audience their primary products via different platforms, like YouTube, Facebook, Instagram, etc.

Digital embodiment of the institutional memory is a relatively recent phenomenon, as it mostly had concerned archiving of art works and cultural products (research reports, books, analysis, photos) that cultural institution had produced. Individual and collective memories were rarely part of digital institutional memory. The key thesis of this research is that the “pandemic production” relied on leadership and/or management approach, while the digitalization of institutional memory and narratives depends on present leadership of cultural institution (theatre), of awareness of its (inst. memory) importance for the present identity of the institution, and of its capacity to envisage the possible use of digitalized memories in cultural institutional practices.

This research is partially based in organizational memory studies (OMS) that focuses on the use of memory from a managerial point of view, and on cultural policies and its recommendations; it further explored research results from COURAGE (Horizon 2020 project), and (unpublished) results from the national research project Identity and memory (178012) that was just finished before the pandemic. Focus is on the digitalization of cultural organizations’ memories, (comprising digitalization of art production, but not only), analysis of structures of digital archives, practice and policies of its use, and, analysis of policies and methods of “pandemic production” and archiving during the recent crisis caused by global pandemic.

Some of these questions we have already researched and written about (Dragičević Šešić & Stefanović 2013; 2017a; 2017b) will be discussed in this text also, such as organizational memory, leadership (Caust 2012; 2018), participative decision making, crisis management (Antonacopoulou

⁹ Thus festival “Nušićijada in exile” offered festival on TV channel Nova S and on its own YouTube channel, where audience could see documentaries from previous editions, discussions, stand-up comedians, etc. https://www.youtube.com/watch?v=65QMh_5aUKA

and Zachary 2014), organizational cultures and learning (Argote, L. 1999), and programming and digitalization policies (organizational mission and vision). Thus, this research will be a cross-disciplinary endeavour taking its notions and vocabulary from different disciplines (Wessel and Moulds 2008), i.e. key terms of cultural memory studies (Assmann 2006; 2011; Connerton 1989; 2008;) would be in “dialogue” with organizational memory studies (Casey 1997; Casey and Olivera 2011), cultural policy (Dupin-Meynard & Négrier, eds, 2020; Jancovich 2018) and cultural/theatre management (Bonet & Schargorodsky, 2018; King & Schramme eds. 2019; Durrer, and Henze, eds. 2020; Jancovich 2015). Methods of research include semi-structured interviews with theatre leaders; narrative analysis of programs and pandemic production; content analysis of media texts dealing with theatre production, etc. The research will focus on data related to theatre work during pandemic, as well as to organizational memory policies and previous and present types of digitalization of institutional memory. The goal of the empirical research was to analyse structures and models of digital archives that theatre have, but also to look into practice and policies of its use during the recent crisis caused by global pandemics, and to explore if eventual changes in the policies of digitalization of content and institutional memory preservation will be happening. Furthermore, we tried identifying approaches by the management teams or leaders, the priorities, the preferences and models for reaching out to the audiences that could not be present in closed theatre spaces. Thus, the cultural experience defined by directness of contact had to explore and find possible ways to communicate and to stay live without basic condition being in place – to create theatre experience “on demand” in digital realm.

Our research questions are directly linked to COVID-19 chronotop (Bakhtin, 1981): what are the models of production and narratives during the pandemic; what is the purpose for digitalization of institutional cultural capital; has a leadership of an individual person (artistic director or director) or a shared team leadership certain impact on policies and practices of digitalization and pandemic production; and would theatre leaders consider a need for digitalization policies to be adapted or redefined after the COVID-19 crisis. The interviews were held in July and August 2020, with directors or upper management of the following public theatres in Belgrade: Belgrade Drama Theatre, Atelje 212 and Bitef Theatre.

Therefore, the theatres we selected for research are city theatres, different in their repertoire policy, different when it comes to organizational model, mission and the role they play in Belgrade cultural scene. What is common denominator, besides being subsidized by city of Belgrade, could be described as absolute focus on standard production and repertory policy as the key way of “theatre identification” within Belgrade, Serbian and regional cultural realm, keeping their profile in spite of managerial (politically induced) changes. However, those selected theatres have shown certain flexibility to offer its stage to different initiatives, ready to enter in partnerships with independent

companies, to let their younger staff to experiment, but also, they had certain politics of digitalization that went beyond just a video-taping of shows (i.e. Bitef digitalization of BITEF theatre posters, interviews with former actors but also with cultural opinion leaders, etc.). Thus, children and youth city theatres were not part of sample, and one important theatre – Yugoslav Drama Theatre, that was not willing to be interviewed and be the part of the research.

“Pandemic production” or what happens when show cannot go on

Before we discuss the pandemic and digital production during the crisis period, it is important to note several things regarding the setting in which public theatres operate, regarding the model and orientation of each of the theatres (Bonet, Schargorodsky, 2018) that we have selected for the analysis. Even before the pandemic, the current model of public theatres, inherited from socialist system that heavily supported and subsidized public culture, was not sustainable, and more or less, always in some state of crisis and transition: "...the institutions are forced to turn towards the market, since they receive funds for their operating costs and funding for the new productions decreases. In addition to that, because of the imposed policy of non-employment in the public sector, public theatres have to work with the “older” company members. Furthermore, there is no specific law on theatre, although the National Council on Culture publicly asked the Ministry of Culture to start a public debate about this much needed law. This means that public theatres navigate between the various laws and regulations concerned with public institutions and administration” (e.g. Law on Culture, Budget System Law, Labor Law etc.) (Stefanović 2018: 8). Furthermore, many internal stakeholders claim the marginalization of theatres was just a consequence of the state of democracy and freedom of speech Serbia was facing during the last decade.

All three selected theatres are “public presentation theatres”, and they all seek to achieve the following goals (Bonet, Schargorodsky, 2018): offering a quality programme that facilitates access to the broadest diversity of citizens possible, regardless of their income level, following the cultural democratisation model (Belgrade Drama Theatre, Atelje 212); being the performing arts reference in its territory (Bitef Theatre); recovering and highlighting classical or national performing arts heritage (Atelje 212); providing opportunities for emerging performing arts professionals and offering the right conditions to consolidated professionals so that they can develop major projects and seeking artistic excellence (Bitef Theatre, Atelje 212).

Furthermore, if we use the orientation as a tool to define each one of the theatres, we can say that Belgrade Drama Theatre and Atelje 212 are both blend of customer orientation theatres and social prestige orientation: “aesthetic line, sometimes quite eclectic, is marked by the attending audienc-

es, and the main aim is filling all the seats. They do not specifically seek to bring in revenue, though that is clearly beneficial, but to meet the demands of the theatre's customers. They seek to incorporate recognised titles, productions of proven success as well as the participation of celebrity artists" (Bonet, Schargorodsky, 2018). The social prestige orientation can be seen and described aimed both at cultivating their recognition as a social space (a meeting place for the elites) and at the earning of awards and of a reputation among the critics, while inviting artists of prestige.

On the other hand, Bitef Theatre, the orientation is artistic: "corresponds to theatres that present a programme that prioritizes aesthetic exploration. Their management staff have close relationships with artistic schools and workshops. They assume risks in relation to the audience, which is mainly composed of people with previous experience. As a general rule, their most daring programme features are presented at relatively small venues" (Bonet, Schargorodsky, 2018:78).

Thus, when the pandemic started, indoor theatres were in a specific position. Due to their organizational model, which includes having the audience present in a closed location (on average 450 seats), the only option was to close the doors and to cancel rehearsals for upcoming productions. After first weeks of shock and adaptation, when literally theatres stayed silent, the theatre management teams decided to offer performances that would be transmitted digitally, or those that would not include more than 10 persons in one physical spot. These models were in place during the lockdown and curfews that lasted for about two months.

Overall, during five months of having different measures of social and physical distancing, theatre managers offered mostly digital content as a temporary substitute for the core theatre products. Addressing cultural needs of the audience while keeping the theatre brands alive and present at least in a digital world was an ongoing task. The social media outlets that were used the most, with biggest promotional impact were Instagram for announcements and spreading the word about timetable and online repertoire schedule, while YouTube channel was used for transmission. It is important to note, that a number of plays that had been available on YouTube, was on theatre's YouTube profiles for many years. Thus, for some theatres, this practice was not new, but the promotion, scheduling and announcements was new promotional instrument.

Thus, we classified types of "pandemic production" that has been offered by institutional theatres in Belgrade:

a) **Video recordings of plays distributed via social media outlets in scheduled time**

This model of distribution was easiest and the most obvious option that was offered by most theatres. Since most of the theatres had archive of recorded plays, each theatre created its own digital repertoire during the lockdown period. However, the technical quality of available recorded plays

differed, and there were two types: professional recordings and recordings for internal use that were of poor quality. One other issue was raised by some managers as a problematic and source of administrative limits for distributing plays online; and it concerns intellectual property rights. When original plays were created, the contracts with artists (like composers, or writers) did not cover necessarily rights for transmission and distribution of artwork. Thus, during new circumstances, managers needed to cover this legal aspect, and to formally have additional agreements with artists or YouTube.

Two theatres, Belgrade Drama Theatre and Atelje 212, focused on transmitting recorded plays, with announcements and promotion on social media platforms. Some of their digital contents were announced as “digital premiers”, although it was not the real case, but it was used in cases when such a digital transmission was offered exclusive timing, and whose digital transmission was for the first time announced.

Belgrade Drama Theatre had simple reasoning that determined the concept of online distribution and broadcasting of performances during curfews. Basically, the quality of recording was a primary criterion when choosing “online repertoire” from their digital repositiorium. Afterwards, the second criterion was choosing plays that are not performed on stage anymore. Finally, the order of plays that was broadcasted was chronological. Thus, the first one was the oldest recorded play that Belgrade Drama Theatre has in its archive, from the sixties, until the plays from recent years. Only three plays that are still “alive” where available on YouTube.

The communication with the audience was mainly through comments left via tools like chat box, or via Instagram messages. The data about the audience was not possible to track, and the feedback was ranging from excitement to dissatisfaction with the quality of sound, as stated by the interviewed managers

On the other hand, Atelje 212 approach to broadcasting did not have any specific criteria for selection of the plays, and, basically, this was decided based on the quality of the recorded material. Most of the plays were previously available on YouTube with high number of views, especially iconic plays like “Radovan III” (one version on YouTube has more than 210.000 views). However, when broadcasting was announced via social media outlets, the audience recalled some of the iconic titles and were attracted again to follow plays in specific timings, especially at the beginning of the pandemics. Using plays that provoke nostalgia and feelings of unity, someone on Facebook also stated that it was Yugo-nostalgic part of the repertory, Atelje 212, maybe without intention, caused on social media reactions that could be described as encouraging, positive, humoristic, and all those were needed during the lockdown.

Yugoslav Drama Theatre also offered on YouTube their popular plays. However, the important challenge for transferring and distributing plays via internet was intellectual property rights, stated by Yugoslav Drama Theatre. Theatres usually do not like even TV transmissions of performances, even when done in the best professional circumstance, and even less were envisaging distribution through social networks. Contracts about intellectual property that have been signed by authors when the plays have been created, usually do not cover the wider distribution of products. For example, if a composer created original music for a certain play, the contract regulated only using the music for live performances, not the distribution via internet. Thus, administrative requirements in pandemic were specific and had to be addressed.

b) Performances for smaller audiences

During the period when the main restriction was related to the number of people per square meter, Atelje 212 under the title “Lonely Planet”, offered series of joint reflections about the future of theatre under and after pandemic for the audience of 10 persons. Belgrade Drama Theatre, on the other hand, organized “live reading” or public rehearsal of the text “Reader”, whose premiere was planned for the 2020/2021 season. There were about 50 persons at the audience, respecting physical distance. However, due to the constant changes regarding the number of people allowed to be gathered at one place, performances with limited number at the audience, were difficult to plan and execute. When the measures were lifted, most of the theatres, downsized the number of audiences.

c) Online discussions and “in house” video productions

The Bitef Theatre focused on offering a platform for debate and discussion while sharing experiences about “new normal” setting. Both projects that Bitef Theatre implemented, “Philosophical Theatre” and “Extraordinary performing arts scene” had a form of online discussions. The audience for both projects included mainly professionals from the field of theatre. While “Philosophical Theatre” was continuation of an independent project that were presented in some other theatres before, “Extraordinary performing arts scene” was the Bitef Theatre initiative.

The “Philosophical Theatre” started its digital version on April 9th, with discussion between Oliver Frlić the director, and Srećko Horvat philosopher, concluding that the corona crisis will not be the end of the theatres but rather a new start, questioning the concept of live performances and possibility of audience seating with at least 2 meters distance. Frlić reflected about the phenomenon of YouTube plays only as a bridge until live theatres will be possible again. He believes that the recordings of plays have another purpose, which is not to be a theatre as it should, and authentic and real experience, and underlined that the online theatre means that actors cannot look the au-

dience in the eyes, while the “level of disinfection” in online versions is very high on many levels. The emigration to online world, means also high level of social control that would be difficult to size down, once the pandemic ends. Stefan Kaegi, Milo Rau, Anja Suša, were some of the other participants in the following editions. Thus, the Bitef theatre continued online programme in May with debates focusing on contemporary dance issues. All debates are recorded for the theatre archive, possible to be retrieved and later used again in a digital realm.

On the other hand, Belgrade Drama Theatre ‘s “Theatre Bards” project was initiated before the pandemic, and it presents unusual initiative for an institutional theatre. The idea was to use an independent TV production for creating TV forms that would be offered to different cable operators. By re-starting Theatre Bards, which was iconic TV show twenty years ago, the general manager of Belgrade Drama Theatre (since 2019) introduced “entrepreneurial” leadership style, that inclines towards the market-oriented practice with the narrative of visibility, accessibility and vicinity to the audience not residing in Belgrade. During pandemics, they broadcasted the old shows on its own YouTube channel.

Narratives during pandemic production

The managers usually perceive the difference between two types of narratives that are created in theatres: official ones and unofficial ones. Official or formal narratives that are chosen to present the wanted story of a theatre are created and nurtured, supported by promotion. The official theatre narratives are chosen to present certain theatre in line with its repertoire concept, marketing approach and notion how the theatre should be position in the future.

“Informal” or unofficial are created by theatre workers as individuals, that share among themselves their memories, and this process is un-curated and depends in a large extent from the self-identification of the theatre workers with the institution. Sometimes these narratives are not in line with official story, and still are important for the identity of certain organization.

Theatre narratives can be described twofold. One part was influenced by the feeling of betrayal by cultural policy makers and founders, and the other, dominant narrative was the narrative of adaptation, digitalization and solidarity.

Atelje 212 has chosen adaptation to a new normal as its first reaction, which later was followed by the narrative of accessibility and solidarity. Solidarity was primarily with colleges that needed help, since the level of care for the others was higher than in normal circumstances. However, the concept of solidarity did not go beyond the care and help to direct stakeholders, and this situation did

not cause wider debate about the model of institutional theatres, artists and cultural workers who do not have “jobs for life” as the ones who are part of the institutional system. The position of cultural workers without long term contracts in institutional theatres (or some other cultural organizations) is fragile and depend on short term jobs.

On the other hand, Atelje 212 does not have recordings of all performances, so the pandemic accelerated the need for further digitalization of content. Thus, Atelje 212 recently started the project, supported by the Ministry of Culture, that will digitalize and make available all recorded plays. Systematization of data and knowledge for the institutional memory purposes does not exist in a structured way, and so far, it has been part of ad hoc decision making and short term planning. Strategic approach would envisage specific knowledge, skills and manpower, which is not available at this moment for all theatres that were included in this analysis.

The Bitef theatre, after the period of “shock” started with tactics of transformation which included narrative of adaptation, in order to bridge the gap until after pandemic. For Bitef Theatre, the narrative of adaptation meant offering relevant topics in a digital frame. This approach actually relates to the theatre’s recent announcement that they will be shifting and repositioning as a “platform for new theatrical tendencies” which will get them closer to the Bitef Festival. In that sense, offering new forms via their platform like Philosophical Theatre and online discussions “Lets continue from the beginning”, were adequate choice.

Bitef theatre invested more thoughts in their archiving process – partially because due to the importance of the festival, they were aware of quality of their “documents”, and partially because Jovan Ćirilov as artistic director of the Festival, “imposed” that archiving practice also on Bitef Theatre, wishing to memorize in this way a significant contribution of Mira Trailović to Serbian culture. Bitef Theatre archive is deposited in City Archive of Belgrade, and it encompasses different artefacts and memorabilia, from posters, photos and brochures, monographs to audio and video materials, all accessible via University Library platform. In last ten years, all production has been recorded, however, that was not the practice before that period. The institutional memory underlines important dates like anniversaries (30 years of the Bitef theatre was celebrated) and the main tool for keeping memories are (interactive) exhibitions and printed materials like monographs.

Belgrade Drama Theatre concept and narrative was the continuity, and fulfilling the plans regarding co-productions, festivals and tours across the region as soon as the lockdown ends. Furthermore, solidarity with associates who did not have long term contracts with theatre, was preserved. The numbers show that for 40 plays, BDT relied on 35 actors with permanent contract (theatre ensemble), 32 associates and 180 visiting actors. This number for visiting actors was drastically lowered, while they tried keeping the associates. Although official narrative was solidarity, in practice this

could not be fulfilled completely. The funding of public theatres was scarce even before the pandemic, and fundraising during the pandemic was not a realistic option. Besides the narrative of solidarity, Belgrade Drama Theatre has chosen the narrative of availability, accessibility and digital possibilities. With developing plans how to offer plays with “pay per view”, this theatre is looking beyond the pandemic, and choosing commercial and market approach for the coming period.

Belgrade Drama Theatre do not have a special archiving policy. Its archive is partially at the theatre, while part is at the Theatre Museum. When the process of archiving was assessed and started to be digitalized, ten years ago, managers found more information about beginnings and first years, than about nineties. The biggest challenge for digitalization was editing of associates written memories. Keeping photographs and saving them in digital version was simple, comparing to keeping written memories and notions, since the amount of such texts was high.

Disconnect between cultural policy makers and leadership (or how the crisis showed the level of readiness to adapt and lead) – Missed opportunity

Digitalization as part of the cultural policy and institutional memory policies, has been already for 10 years on the agenda of the Ministry of Culture and Media and the Government of Serbia. Museums and libraries had been at the forefront of these actions, as they had both inner motivation and outside (governmental) attention and support, willing to use digitalized artefacts in the cultural and digital diplomacy (Dragičević Šešić & Stefanović, 2020). In theatres, the situation has been a little bit different. The inner motivation was present, while the support was partial, and for some theatres, like Atelje 212, the support came just earlier this year.

Ministry of Culture and city secretariats for culture seemed to be very inactive during the pandemic, offering no instructions, consultancy, training, or any kind of help. The cultural institutions “obeyed” general regulations that were imposed for all organizations in public sector (work from home for monthly income). No one from the Ministry of Culture had phoned, or send memo with any kind of questions or instructions; there were no attempts to keep communication – except weekly distribution of masks and gloves through Ministry of Culture for “National” institutions. It seems that this period was not used by the cultural policy creators to develop discussions about future policies and (common) practices and developmental strategies

However, Ministry of culture initiated “Digital solidarity” platform - webpage <https://www.digitalnasolidarnost.gov.rs/#digitalnasolidarnost> with intention of collecting and gathering all information about different cultural products that have been accessible for free, from free books, movies, music, theatre plays, etc. Solidarity here, was meant to be a solidarity with popula-

tion, but not the solidarity with artists that stayed without possibilities to work (especially it was traumatic for performing artists that are part of collective artistic expressions). However, for wider audiences, the technical and visual experience for most of the webpage links offered is non-inspiring, on the contrary. It seems the investment in digitalization of cultural products in order to make them attractive needs to be developed, since the customer experience should offer something could substitute the excitement of life theatre dynamics and feel.

The other initiative in which actors from theatres participated, was a social awareness campaign about the pandemic and need to “stay home”. The campaign was initiated by Regional Government of Vojvodina.

In June, when it seemed the epidemiological situation got better, and it was announced that the virus is under control, Belgrade city managers decided to open and to offer to theatres summer stage at Tašmajdan (public venue and park). All public theatres were invited to perform on that stage. The “summer repertoire” started with musical “Mama Mia” by Terazije Theatre, but after two performances that were attended by more than thousand people, actors publicly stated that they feel unsafe and that the number of people at one location, even outside, presents a health risk for all. Actually, this request coincided with the rise of the number of people diagnosed with Covid-19. Thus, after two more performances by Belgrade Drama Theatre (about 300 persons in the audience), the decision was to stop with performances in the summer stage until further notice.

As mentioned, the founder (city government and Secretariat for culture) of analysed theatres during a pandemic did not have active approach towards the theatres, and that its role was purely administrative - controlling. All recommendations imposed to the theatres were related to the security of staff and health standards while the content, or production work was not part of the official or unofficial communications and discussions. Theatre leaders and managers were left to themselves to decide and to implement if possible, any kind of content. On one hand, this was beneficial for theatres because they had an opportunity to act independently and to adapt according to their values, mission, and assessment of the situation and sources available. On the other hand, the founder missed the opportunity to facilitate, to lead and to create better conditions for the theatre stakeholders, by offering new venues, models, new tools and additional support for creation and distribution of cultural products.

Cultural policies, Leadership and Governance paradoxes (Instead of conclusion)

Even cultural policies during crisis lacked leadership. The Minister of Culture, as well as the City secretary for the Culture were pretty invisible during first few months of the pandemic, and, what is more important, missed to use the crises as an opportunity for the development of integrative public policy (Dragičević Šešić 2009), at least on the city level. It was a bottom-up cultural policy that started to be developed through different solidarity and advocacy actions, led by Association of Drama Artists of Serbia and the Association Independent Cultural Scene of Serbia, as well by other actors within civil society, that were questioning reasons of the lack or huge delay of cultural policy measures¹⁰. However, public discourse and debate during the COVID-19 crisis was directed towards the medical issues and support to medical workers, thus overall, cultural sector did not receive much of an attention or support.

Leadership during crises is at numerous challenges (Antonacopoulou E. and Zachary Sh. 2014, Caust 2018), as it has to concentrate on solving immediate problems, to focus on issues that demand urgent reactions and for whom there are no procedures or routines. It both reflects internal organization of working process as well as repertory policies – ways of relating to stakeholders and audiences.

Thus, when we observed and analysed the leadership during this pandemic crisis, in most of interviews and other data (collected from daily press), it was clear that the director (who has a lot of authority according to the Law on Culture, 2011), had to initiate a process of reflections and decision making during the pandemic phase in an unusual way, as regular meetings and procedures had been cancelled. But, most of boards of cultural organisations did not meet during the pandemic. It is obvious that boards in Serbia are seen as (Dragičević-Šešić & Mihaljinac, 2020) formal, representative bodies, appointed by the founder, that are gathering once or maximum twice a year for their regular duties (approving the report for previous and the plan for the next year), and that management of cultural organisations, including theatres, had not thought about their possible role in the situation of crisis. There were no attempts to include users in a reflection, even less in a decision-making process (Jancovich 2015; 2017), or to engage its own staff, stakeholders or other relevant opinion-makers in the cultural realm, to identify possible ideas or solutions to continue its work in a digital realm. This COVID-19 chronotop offered the unique opportunity to test intersectoral partnership with IT companies and companies active in the creative industries, what was done

¹⁰ On May 27th the NGO Creative Serbia had organized a debate at Dorćol plac, „Culture after Covid-19“, addressing a public appeal to the Prime Minister, as it seemed that all previous appeals to the Ministry of Culture had not have any results. <https://antivirus.in.rs/debata-u-dorcol-placu-i-pismo-intelektulaca-ani-brnabic/>

within civil and private sector, but public cultural institutions have not tried to make any new entrepreneurial move.

Since the orientation of two theatres, we have described as customer oriented and social prestige, it was also expected to have immediate policies that would first try to answer main customer needs and interests. Second goal, was again to show capability to fast adapting and to draw a picture of a theatre that is keeping social prestige in digital sphere as well.

The theatre with artistic orientation, kept “artistic” approach by creating critical thinking programs and projects, only in digital form.

All leaders needed to find a balance between fulfilling prescribed administrative measures and substituting show that could not go on for now. But, from the institution to institution the rules have been different and level of self-initiative, engagement and responsibility of the employees have been different. In all previous cases of pandemic production, it appears that team spirit prevailed and influenced the decision making, and that the “leaders” delegated adapting approaches to the higher management. The crisis reunited teams who were quite small (2-5 people) and that joint reflections and reasoning influenced the final decision on pandemic modalities of production, and the narrative creation.

But the announcement of Belgrade city secretariat initiative of joint stage (in Tašmajdan park) had prevented each theatre to develop its own, specific response, and to use its own resources, such as squares in front of theatres and courtyards that some of them are having. There were no stimulants to explore cultural heritage sites and parks for performances, or encouragements to work in ateliers (workshops) on specific projects of applied or community theatre. It seems that evident advantage of having systemic and complex digital theatre archive had not inspired leadership to create new digital theatre projects, from those related to memory digitalization, gathering individual memories, artefacts till more complex experiments that would engage artistic ensemble in storytelling productions, or experimental digital theatre projects that predominated within independent theatre collectives.

Large dissatisfaction of cultural operators working for public sector throughout Serbia, represents the biggest challenge for each new director that comes in the organization. This can be solved only with very innovative and different approach of the manager, that is capable to fundraise outside the public sector in Serbia (to attract European projects, etc.), developing intersectoral partnership projects, thus finding way to raise income, but also to help continuous professional education that unfortunately is completely lacking as a system in Serbia (no funds, or foreseen free days for that), to open space for inner initiatives and creativity. Digital learning tools and innovative work in a digital

realm, might be a partial response to that, as well as an initiative to use digital tools for best individual stories about the history of the institution

This research had shown that the key problem in the present theatre realm in Serbia is related to undefined cultural and theatre policy, lack of autonomy of public cultural institutions, weak leadership that feels threatened by illiberalism - partocratic political system that demands servility, introduces elements of populist communication and populist reasoning even in cultural field. Despite of having excellent artistic and technical teams within theatres, their artistic, technical and intellectual capacities stayed unused – and all activities were held on minimum, while independent organisations used this period for continuous professional development, digital archiving and digital production. Thus, the long-term impact of COVID-19 crisis is yet to be evaluated and measured in public sector in Serbia.

REFERENCES

Antonacopoulou E. and Zachary Sh. 2014, Learning *in* Crisis: Rethinking the Relationship Between Organizational Learning and Crisis Management, *Journal of Management Inquiry* 2014, vol. 23: n.1, pp. 5-21

Argote, L. 1999. *Organizational learning: creating, retaining and transferring knowledge*. Norwell MA: Kluwer Academic Publishers.

Assmann, A. 2006. *Der Lange Schatten der Vergangenheit. Erinnerungskultur und Geschichtspolitik*. Munich: C.H. Beck.

Assmann, J. 2011. *Cultural Memory and Early Civilization: Writing, Remembrance and Political Imagination*. Cambridge: University press.

Bakhtin, Mikhail. 1981. "Forms of time and of the chronotope in the novel." In *The Dialogic Imagination*, edited by Michael Holquist. Austin: University of Texas Press.

Banks M. & O'Connor J. (2020): "A Plague upon Your Howling": art and culture in the viral emergency, *Cultural Trends*, DOI: 10.1080/09548963.2020.1827931

Bonet, L. & Schargorodsky H. 2018. *Theatre Management: Models and Strategies for Cultural Venues*, Elverum: Kunnskapsverket

Casey, A. 1997. "Collective memory in organizations". In *Advances in strategic management: Organizational learning and strategic management*, P. Shrivastava, A. Huff and J. Dutton (series Eds.) and J. Walsh and A. Huff (Vol. Eds.), 14: 111–151

Casey, A. and Olivera, F. 2011. Reflections on organizational memory and forgetting. *Journal of Management Inquiry* 20 (3): 305–310.

Caust, J. (2018) *Arts Leadership in contemporary context*, London: Routledge

Caust, J. ed. 2012. *Arts Leadership, International Case Studies*, Mornington: Tilde Publishing and Distribution

- Cohen, P. 2014. *History and popular memory: The power of story in moments of crisis*. Columbia University Press.
- Connerton, Paul. *How Societies Remember*, Cambridge University press, 1989. Serbian edition: *Kako društva pamte*, Samizdat B92, Belgrade, 2002.
- Connerton, Paul (2008) "Seven types of forgetting", *Memory Studies*, vol. 1 no. 1, pp. 59-71.
- COURAGE** ("Cultural Opposition – Understanding the Cultural Heritage of Dissent in the Former Socialist Countries"), *Country reports*, <http://cultural-opposition.eu/activities/policy/>
- Dragičević Šešić, M. (2009) Kultura u funkciji razvoja grada – kulturni kapital i integrativna kulturna politika, *Kultura* br. 122/123, Beograd: Zavod za proučavanje kulturnog razvitka, str. 20-40.
- Dragičević Šešić, M. 2013 The role of culture in democratic transition: Southeast European experience of civic cultural organisations, *Proceedings of the Faculty of Dramatic Arts*, n. 23: 157-168.
- Dragičević Šešić M. & Stefanović M., 2017a. Leadership styles and values: the case of independent cultural organizations, in *Cultural Management - Science and Education*, Volume 1 Number 1/2017, ISSN 2512-6962
- Dragičević Šešić M. i Stefanović M. 2017b. Organizational trauma - types of organizational forgetting in the case of Belgrade theatres, *Etnoantropološki problemi*, ISSN: 0353-1589, n. 2-2017, pp: 621–640.
<http://www.anthroserbia.org/Content/PDF/Articles/fbc0162ffd1744feaae99294a2579aa2.pdf>
- Dragičević Šešić M. & Stefanović M., 2013. "How Theatres Remember: Cultures of Memory in Institutionalized Systems", in *Culture* (Skopje), br. 4/2013, str. 11-29, ISSN 1857-7717
- Dragičević Šešić, M. and Mihaljinac, N. 2019. "Serbia", in *Cultural Governance in a Global Context: An International Perspective on Art Organizations*, eds. King, I. W. and Schramme, A., London: Palgrave MacMillan, p. 221-266.
- Dupin-Meynard, F., Négrier, E. eds, 2020, *Cultural Policies in Europe: A Participatory Turn?* Toulouse: Occitanie en scène, and Les Éditions de l'Attribut
- Durrer, V. and Henze, R. eds. (2020), *Managing Culture: Reflecting On Exchange In Global Times*, London: Palgrave MacMillan,
- Feldman, R. M. and Feldman, S. P. (2006) What links the chain: An Essay on organizational remembering as practice. *Organization* 13(6): 861–887.
- Gonçalves, S. and Majhanovich, M. eds. (2016), *Art and Intercultural dialogue. Comparative and International Education (A Diversity of Voices)*, Rotterdam: Sense Publishers
- Jancovich, L. (2017) The participation myth. *International Journal of Cultural Policy*, 23 (1). pp. 107-121. ISSN 1028-6632
- Jancovich, L. (2015) Breaking down the fourth wall in arts management; the implications of engaging users in decision making, *International Journal of Arts Management*, vol. 18, n. 1.
- King, I. W. and Schramme, A. eds. (2019), *Cultural Governance in a Global Context: An International Perspective on Art Organizations*, London: Palgrave MacMillan
- Rosa, Hartmut (2015), *Social Acceleration: A New Theory of Modernity (New Directions in Critical Theory)*, Columbia University Press.
- Stefanović, M. (2016) Freedom of expression in contemporary theatre – the right to offend, *Ars*

Academica (Skopje) n. 4

WESSEL, I. and MOULDS, M. L. (2008) How many types of forgetting, Comments of Connerton. In Sage: London, *Memory studies*, vol. 1 (3), 287-294

Business model innovation through digitalization in cultural organizations: the case of MAXXI

Pamela Palmi

Dipartimento di Scienze dell' Economia
University of Salento
pamela.palmi@unisalento.it

Lorenzo Madaro

Accademia di Belle Arti di Lecce
madaro.l@accademialecce.it

ABSTRACT

This paper contributes to our understanding of the theory of business models, and how digital technologies facilitate business model innovations in the cultural and creative organizations. The research assessed that within a cultural and creative organization, as is the case of the MAXXI National Museum of Arts of the XXI Century in Rome, the extensive use of digital technologies during the Covid-19 pandemic – which first forced to a lockdown and then led to a substantial decrease in terms of public attendance – had the positive impact of deeply innovating its business model. The carried-out analysis turned up remarkable BMI outcomes with particular regard to digitalization, in order to comprehend how innovation was generated, and the significant results it bore vis-à-vis the museum's social mission: increasing customer value, creating new value, building relationships, creating a new aesthetic experience, and fostering audience engagement.

Keywords:

Business model
Innovation
Digitalization
Cultural
organization
MAXXI

Acknowledgements

The authors are grateful to the staff of the Communication Office of the MAXXI Museum for their collaboration

1. Introduction

In recent times, cultural and creative organizations, constantly suffering due to scarce public financial resources, have been stressed by the unexpected and catastrophic event of the Covid-19 health emergency, which led to rapid organizational changes and the need for a new management to renew their business spectrum and survive.

At an international level, the impact of the pandemic on the cultural sector is manifest and substantial: all major events and happenings have been canceled or deferred, while art galleries and museums were forced to temporary closures to the public. The lockdown measures, which involved cultural sites, forced governments around the world to adopt extraordinary measures, aimed at providing economic and financial support to sector-specific operators (aids and emergency funds aimed at art & culture activities).

In Italy, the nation-wide suspension of public events, live shows and cultural happenings, as well as the closure of theaters, museums and other places of culture, was imposed by Prime Minister Decree of March 8, 2020, while several regulations enforced further restrictive measures up to May 17, 2020, established by Prime Minister Decree of April 26, 2020. However, even after that date, public access and opening times were rigorously restricted and, due to safety distancing, attendance to places of culture was considerably lower than previous standards.

In view of implemented restrictions to control the pandemic, museums around the world have increased their digitalization process, which had already been underway, widening the range of public content both on proprietary channels (museum institutions' websites and APPs) and non-proprietary channels (social and media networks, and online platforms for the dissemination of cultural content). Virtual guided tours, podcasts, streaming conferences, *chatbots*, video and image sharing on social profiles, as well as User Generated Content are but some of the solutions implemented by museums to guarantee a safely distanced cultural enjoyment.

Based on its online strategy, the International Council of Museums (ICOM) identifies three different models of "digital museums": (i) the *brochure museums*, that is web pages designed to convey general information on the museum institution; (ii) the *content museum*, meaning digital databases devoted to museum collections; (iii) the *virtual museum*, or *online platforms* that stand out for the quality and variety of applications and digital content especially aimed at users, so as to guarantee a level of cultural enjoyment similar to the live experience. The latter model is getting the most attention by today's museums.

In Italy - also pursuant to the first Three-Year Museums' Digitalization and Innovation Plan approved by MIBACT-Italian Ministry for Culture on July 19, 2019 - the use of digital technologies in museums is increasingly emerging as a valid method to increase audiences and engage visitors in the virtual, immersive and entertainment realities pertaining to their community. The latest museum trends involve "User-Generated Content", "Visitor-Generated Content", and "Crowd-Curated Exhibitions", as well as customized online collections, mobile tours, newsletters sent via email, and the participation to interest groups on social channels.

In factual terms, the implementation of a digital strategy has extraordinarily been pushed up by the health emergency, especially in the most representative museums, which are more keen to the production of creative and innovative solutions, as is the case of MAXXI, the National Museum of XXI Century Arts based in Rome, designed by architect Zaha Hadid and managed by the same-name MIBACT Foundation, which consists of two sections: MAXXI Arte and MAXXI Architettura. The MAXXI's experiment has strongly innovated the museum's business model and, due to its success, serves as a best practice in a sector that can encourage the creation of novel museum standards, deploying technological tools and innovative communication contents, both across proprietary channels and on social channels/media networks managed by third party operators (YouTube, Instagram, Facebook, Twitter, Pinterest, Google+).

The purpose of this paper is to examine the effect of widespread digitalization on the Business Model of MAXXI, the Italian National Museum of Contemporary Art. Based on a representative case study, we found that digitalization is revitalizing cultural and creative organizations by innovating the Business Model, yielding the following results: increasing customer value, creating new value, fostering relationships, fashioning a new aesthetic experience, and building a greater audience engagement.

Digitalization offers a social value to a wider audience, bearing lower costs, and involving visitors through the virtual experience. The creative use of digitalization provides a mechanism for the innovation of the Business Model in cultural organizations, strengthening the museum's social mission.

2. Theoretical background

2.1 Business Model

In the last twenty years, the theory of business models has been developing quickly, attracting strong interest from both academics and professionals. Digital technologies are regarded to play a critical and enabling role in facilitating business model innovations across different sectors. However, despite the growing number of research papers on business models, a systematic review of the literature reveals how the concept of business model itself remains rather elusive (Li, 2020). Relevant emerging trends in business model innovations, in particular, and the digital transformation of business models remain poorly understood (Spieth et al., 2014; Visnjic et al., 2016).

This paper is based on the Holistic Business Model theory (Feng Li, 2020), systematically outlining its key constructs (what), using the framework to analyze how the case study business model has changed, and why. It further explores the role that digital technologies play in the innovations introduced in the business model, based on the empirical evidence of the case study.

The work contributes to an understanding of the business model theory, and how digital technologies were used to facilitate business model innovations in the cultural and creative industries (Comunian, 2011; Ferrandiz, 2011; Hesmondhalgh and Baker, 2010; Pratt, 2009; Paltoniemi, 2015; Petruzzelli and Savino, 2012, 2015). Besides, it explores the potential role of cultural and creative organizations in stimulating innovation and entrepreneurship also across other sectors. As a matter of fact, cultural and creative organizations not only serve as an engine for economic growth, job creation and social cohesion (Pratt and Jeffcutt, 2009), but also as an innovation hub, a managerial experimentation, deploying new organizational and business practices in order to prompt innovation and entrepreneurship across other sectors of the economy (Lampel e Germain, 2016; Petruzzelli e Savino, 2015).

2.2 Digitalization

In this paper we define digitalization as the transformation of work processes and activities into digital formats, in order to drive productivity and growth (Brynjolfsson & McAfee, 2011; De Mauro, Greco, & Grimaldi, 2015). Utilizing digital technologies often leads to innovation, with positive implications that may include the improvement of capabilities and competitive advantages for the organization (Kyriakou, Nickerson, & Sabnis, 2017; Svahn, Mathiassen, & Lindgren, 2017). Several studies have examined the implications of digital tools that are now the norm, such as e-commerce

and social media (Bouwman, Nikou, Molina-Castillo, & de Reuver, 2018), while digital technologies are evolving rapidly with the continuous development of robots and artificial intelligence (Kaplan & Haenlein, 2019; Wirtz et al., 2018). The outcomes of digital technologies on organizations may be explored through examining changes in the business model, with increasing evidence that business model innovation (BMI), through novelty in the way an organization produces and delivers value, enhances organizational performance (Foss & Saebi, 2017). Value creation processes, value capture processes, and value proposition have been identified as three components of BMI (Bouncken & Fredrich, 2016; Massa & Tucci, 2013). In particular, value proposition for an innovative service or feature has been related to BMI outcomes (Cucculelli & Bettinelli, 2015; Dunford, Palmer, & Benveniste, 2010; Gummerus, 2013; Matzler, Bailom, von den Eichen, & Stephan, 2013). To advance this research, we examine the implications of digitalization on value proposition and consequently BMI outcomes in the context of art museums.

In this study we aim to examine the emergence of BMI outcomes in a cultural organization (museum) with a focus on digitalization to understand how it leads to innovation and how it enables the strengthening of social functions.

2.3 Digitalization as a driver for business model innovation

Digital technologies are a key factor for business model innovation, enabling new ways of creating and attaining value, new exchange mechanisms and transaction architectures, as well as novel organizational forms able to broaden the organization's boundaries (Al-Debei & Avison, 2010; Gordijn & Akkermans, 2001; Lindgardt et al., 2009).

As Li (2020) argues, the holistic framework enables a systematic examination of business model innovation through digital technologies. In the literature, three groups of categories are basically traced to classify changes in the business model: automation, extension and transformation (Li, 2007; Lindgardt et al., 2009; Massa and Tucci, 2012). Automation refers to cases in which a firm uses digital technologies to automate or enhance existing activities and processes, such as displaying information or supporting communications.

Extension illustrates cases in which a firm uses digital technologies to support new ways of conducting business, which supplement, but do not replace, existing activities and processes. Transformation refers to cases in which digital technologies are used to enable new ways of conducting business to replace traditional ones.

3. Research Method

The need to investigate how the business model of one of Italy's most important museums has changed due to the intensive use of technology, as a measure to face the Covid-19 pandemic, and the early stages of research on this issue, has led us to conduct an inductive study (Easton 1995; Eisenhardt 1989). The in-depth case analysis (Easton 1995; Eisenhart 1989; Yin 1994) seemed to be consistent with the exploratory nature of this research. The case study can be considered a well-suited research strategy as it offers "depth and comprehensiveness" (Easton 1995, p. 475) to understand the organizational complexity of this topic.

The strength of a case study lies in the investigation of a complex situation, consisting of several variables in order to gain an in-depth understanding, and further insights from the phenomenon (Yin, 2017). External validity is lacking, as the study focuses on only one representative case to provide a 'force of example', as findings are not generalizable (Flyvbjerg, 2006). However, the generalizability of a case study can be increased by the strategic selection of the case (Ragin & Becker, 1992). Therefore, the case was selected based on purposeful sampling to discover, understand, and gain insights (Merriam, 1998). The lack of external validity is compensated for with internal validity through data triangulation, that is by collecting data from different internal and external sources to increase the credibility of interpretations, maximize the robustness of the analysis, and the confidence in the conclusions (Bryman, 2015; Jick, 1979).

The rationale for context selection is to investigate BMI outcomes in a cultural organization with a particular focus on digitalization. Art museums are institutions that collect, research, display, and preserve art, as well as engaging with audiences through exhibitions to increase awareness and appreciation of the arts (Smithsonian Institution, 2001). Our choice reflected our desire to capture variations in the objective behind digitalization, and explore wider applications of digital technologies in art museums. The MAXXI has embraced a globalization strategy, addressing the whole world during the pandemic, and using digitalization mainly to cater to the Italian public delivering a rather unique offer, with the purpose of gaining a strong audience engagement and fostering relationship with its public.

We collected data from primary sources (semi-structured interviews) and secondary sources to provide a wealth of information about the investigated phenomena, in order to reveal the bases of decisions on digital projects, and the subsequent outcomes (Stake, 1995).

Data were collected from internal documents, including annual reports and minutes of online meetings, and external sources, including newspaper articles, magazine reports, and stories published on the web. A deductive data analysis and theory testing approach has been used to understand whether the theory applies to the context, and to strengthen the confidence in findings through 'pattern matching' (Gabriel, 2013; Hyde, 2000; Yin, 2017). Consequently, we used a template analysis by integrating the data of cases with a framework (Yin, 2017). We believe that the combination of the above different sources helped overcome the limitations of an analysis based on data from separate sources (Yin 1994, p. 92).

Over time, we studied the MAXXI starting from the early stages of the digitalization process, and especially from March 2018, when the Museum launched a chatbot, i.e. a digital assistant facilitating virtual visits and thus fostering public loyalty. However, our monitoring research began on March 10, 2020, when the museum launched digitalization projects specifically designed to face the lockdown, with the purpose of improving public use and creating broader engagement, thus strengthening the social facet of the Museum's mission.

We then thoroughly examined the identified initiatives, focusing on the following questions: 'What initiatives were adopted with the purpose of improving (in terms of effectiveness and efficiency) the museum's social mission? How were the initiatives and the underlying purpose deployed, and what is the end result?'

The first analyses focused on the connection between digitalization and value change, with regard to the public. Further, the research aimed at discovering how digitalization yielded new value for the organization, and particularly in terms of social outcomes. Examples of new value creation emerged from innovative ways of managing the collection's works, or from the new, specially designed offer during the lockdown phase (new products), and from a novel and improved interaction with the public.

We believe that a story was written by pulling together digital innovations and the effect on BMI outcomes, in order to create a dense description (Stake, 1995)

Table 1: Description of Data Source

<i>Primary sources</i>		Date	Hours
Semi-structured interviews	Prisca Cupellini, Communication Office Manager	September 14 th	1 hour
	Flaminia Persichetti, Communication Office	September 25 th	1 hour
	Beatrice Fabbretti, Communication Office	September 25 th -, October 8 th	2 hours
<i>Secondary sources</i>			
Report on MAXXI Museum	<p><i>Newspapers</i></p> <p>La Repubblica Corriere della Sera Sole 24 Ore</p> <p><i>Periodical newspapers</i></p> <p>Robinson (La Repubblica) Elledecor Artribune Exibart Artemagazine Living (Corriere della Sera) Ilgiornaledellarchitettura.com Rivastudio.com Exibart.com Wired</p>	March 10 th - October 7 th 20	Several pages and min.
Official communication by MAXXI Museum	<p>MAXXI official YouTube channel and Facebook interviews and speeches of Giovanna Melandri (President of MAXXI) and Hou Hanru (artistic director of MAXXI)</p> <p>Marathon dedicated to 10 years MAXXI with interventions by the board and many international speakers (artists, artistic curators writers, intellectuals, policy makers)</p>		<p>several min.</p> <p>199 videos</p>
Archival official documents and periodical project reports	<p>#iorestoa casa. Dossier 10th March-1st June 20</p> <p>MAXXI yearly report 2019</p>		<p>about</p> <p>250 pages</p>

4. Case study: The MAXXI Museum

MAXXI, the National Museum of the 20th Century, was inaugurated in Rome ten years ago in a building specially designed by international architect Zaha Hadid. It is the only Italian public museum that, in addition to visual arts, also focuses on architecture and design, proposing a double commitment: on the one hand the exhibitions, often important and very demanding in terms of layout, the quantity and quality of the works and documents; on the other hand, for the purpose of study and research, which allow the museum to be especially committed to the design of new exhibitions and new publications. Over 400 works of contemporary art bear witness to the international artistic production, with a particular preference for Italian artists from the 1960s to the present day, through acquisitions and donations and long-term loans; in the architecture collection there are documents, projects and models that highlight the great history of architecture. Painting, installations, video-art, sculpture, net-art and photography thus form a nucleus of works in which the research of younger artists dialogues with that produced, between the 1960s and 2000, by some of the most significant Italian and foreign artists of the period, such as Alighiero Boetti, Francesco Clemente, William Kentridge, Mario Merz, Gerhard Richter. Aldo Rossi, Enrico Del Debbio, Carlo Scarpa, Pier Luigi Nervi, Paolo Soleri, Vittorio De Feo, Maurizio Sacripanti, Alessandro Anselmi, Giancarlo De Carlo, Carlo Aymonino, and Superstudio are some of the Italian protagonists of the collections, which include over 50 funds: about 60,000 project works, 75,000 photographs, numerous models, letters and documents, sculptures, tempera, printed materials. The collections are constantly augmented by purchases, donations and commissions following exhibitions, competitions or prizes. MAXXI is managed by a Foundation established in July 2009 by the Ministry of Cultural Heritage and Activities, and chaired by Giovanna Melandri.

Since December 2013, Hou Hanru is the Artistic Director of the museum, which includes MAXXI Architettura, directed by Margherita Guccione, and MAXXI Arte, directed since 2016 by Bartolomeo Pietromarchi. An education department takes care of the workshops' activities for schools and children; a communication office coordinates all activities on social networks and the web. Guided tours, a cafeteria, a restaurant, a bookshop, and a conference room are the additional services that the museum offers to visitors and companies.

One of the museum's principal missions is its systematic commitment to disseminating contemporary art, and its diverse languages. This is also achieved through the use of the web and social networks, which - especially in recent months - have been implemented to render cultural and exhibition projects more accessible to the general public, thus allowing the museum to increase fol-

lowers' loyalty. During the lockdown period, and immediately thereafter - from March 10 to June 1, 2020 - the project "#iorestoacasa with MAXXI. Free to go out in spirit" launched an Instagram, Facebook and YouTube campaign producing over 200 aptly designed video contents, and totaling about 14 million global views.

The museum's efforts were all the more fundamental in terms of accessibility at a distance, easing "journeys" among the iconic collection's works, also using the IS-International Sign language and audio-descriptions for the visually disabled. When Italian and other Countries' museums were closed, MAXXI launched its new online edition, a sort of parallel museum which involved thinkers, artists, architects, curators, scholars, educators, and journalists. Giovanna Melandri, the president of MAXXI, in an interview for "Elledecor" declared:

"When we were forced to shut down our premises due to the pandemic, I called a strategy-oriented meeting where we all shared a palimpsest, an offer which is unique in its own way. We wanted to serve our Country, also because everything we are doing is available free of charge on our social networks. Now is all about interconnection, this is a service we render to each other (...)"

"We have thus become a publishing company. From being a museum, the Maxxi is now a publisher-museum".

5. Results and Discussion

Consistent with the exploratory aim of the research and with the qualitative methodology described, our research on the MAXXI case study revealed an array of particularly interesting arguments, namely how digital technologies facilitate business model innovations in the cultural and creative organizations.

We categorized our findings according to the concept of digitalization as a driver for business model innovation. The main outcomes are focused on digitalization initiatives and their subsequent effects. BMI metrics that include increasing customer value and new value creation are used to account for the emergence of BMI outcomes (Matzler et al., 2013).

Increasing customer value

Some studies have shown that the outcome of BMI can be measured by observing a significant increase in customer value (Alshawaaf & Lee, 2020). This dimension enhances organizational per-

formance by appealing to customers, so as to either pay a higher price for an offering, or make recurring and more frequent purchases. Matzler et al. (2013) have examined how to combine different organizational aspects including product, service, sales, marketing, and revenue to develop an ecosystem that creates sustainable and recurring purchases from customers.

However, customers can get a value increase even when the organization cuts its offer's costs or keeps the same price (Richter, 2013). This is exactly the case of the MAXXI Museum, which offered a new, no-charge program with new contents grouped in an array of projects especially devised for the lockdown: Artist Actions (video-performances created by 16 famous artists); Collection (19 videos with the most iconic works of the Museum's permanent collection); Listen to the Collection (audio descriptions of 4 seminal museum's works, read by famous actors); Education (production of 12 educational videos for children and families), 10 Years of Exhibitions (the most significant exhibits, with documentaries by SKY Arte); A New World (short videos with 20 philosophers, intellectuals and artists with their views on the changing world during the pandemic); Prime Time (12 video art works broadcast in prime time). Therefore, innovations that significantly increase customer value are important for achieving BMI outcomes.

Creating new value

Digitalization manifests itself in digital organizational forms, digital infrastructure, and digital activities to drive productivity and growth or generate a competitive advantage (Brynjolfsson & McAfee, 2011; De Mauro et al., 2015; Hinings, Gegenhuber, & Greenwood, 2018; Kyriakou et al., 2017; Svahn et al., 2017). In the case of the MAXXI Museum, digitalization enables synergies created between the museum and its suppliers (artists, architects, art curators, writers, intellectuals) in order to develop internal capabilities and new products-artwork (Svahn et al., 2017). Thus, the combination of human and digital capabilities is significant in terms of organizational competitiveness and survival.

Recent studies attempted to examine the relationship between digitalization and BMI. Digitalization innovates the business model through the value creation process, the value capture process, and value proposition (Mort, Weerawardena, Sargeant, & Bennett, 2015; Parida, Sjödin, & Reim, 2019). The value creation process through digitalization can occur by creating novel products, understanding customer needs, and collaborative value creation, new capabilities, and operational processes.

This case study shows how the process of creating value through digitalization is implemented by devising innovative proposals and new offers leveraging from existing collections, thus understanding the visitor's needs and working together to create value, explore new skills and deploy innovative processes to benefit from works of art.

MAXXI carried out several initiatives to make its collections usable by an ever-wider audience. The main projects were:

- "Artist Actions", 16 famous Italian and international artists created original video performances;
- "Collection", 19 videos to explain the most iconic works from its permanent collection;
- "Listen to the Collection", audio stories of 4 works, read by famous actors;
- "Education", production of 12 educational videos for children and families,
- "10 Years of Exhibitions", a journey through the most significant Museum's exhibits, thanks to documentaries produced by media partner SKY Arte;
- "A New World", videos by 20 philosophers, artists, psychoanalysts, writers, intellectuals, with reflections on the changing world during the pandemic;
- "Prime time", 12 works of video art broadcast in prime time.

The value capturing process can take place by improving internal processes to achieve more effectiveness and efficiency, new flows of interactions and audiences, and innovative management approaches (Alshawaaf & Lee, 2020). MAXXI took the effort to strengthen its social mission (hardly generating profits) through the new process of involving the public and a thorough enhancement of its artistic heritage, but also throughout the cultural and cognitive fabric of its relationships, by way of special initiatives during the lockdown. For instance, the "Rome-Milan A/R" project encompassed five meetings with key players from major cultural institutions of the two cities, with panels on the coronavirus emergency vis-a-vis culture; while the "Architecture" and "Design" projects managed by MAXXI Senior Curator for architecture Pippo Ciorra, examined the most innovative works of the last 20 years.

Value proposition is an innovative service or feature that attracts customers to use or purchase offerings. Digital applications may be offered through social media and big data that have positively affected the performance (Bouwman et al., 2018). This was the case of the MAXXI Museum. Point in fact, between March 10 and June 1, 2020, the online traffic outlook (analytics) shows that 57% of the public (customers) used Organic Search, while 19.28% used Direct, 15.17% used Social, and 8.27% used Referrals. 88.21% of Social traffic refers to Facebook, 4.25% to Instagram, 3.97%

to Instagram Stories and 1.14% to Twitter (the rest refers to YouTube and LinkedIn). The views total stands at about 14,000 while the total of interactions reaches 253,406.

This research, however, examined digital tools that are now the norm in the practices of organizations, both private and public. We extend this line of research to evolving digital technologies bearing a wider role in increasing customer value and new value creation. Three digital innovations are identified to be integrated with the business model: interactive services, services robots, and artificial intelligence.

Interactive services refer to '*services that have some form of customer-firm interaction in an environment characterized by any level of technology (i.e., a high or low technology environment)*' (Bolton & Saxena-Iyer, 2009, p. 92). Customer participation is important for an effective interactive service delivery. For instance, a study in the tourism industry has found that interactive services are positively related to a pleasant touristic experience (Dao & Yang, 2019). The importance of interactive services in organizations lies in increasing the power of consumers, as well as creating synergies between service channels, and during transactions (Berry et al., 2010).

Since March 2018, MAXXI visitors can access a digital guide to discover curiosities and information about the museum. A chatbot, also available in English and activated through Messenger on the Facebook page of the museum, allows to follow thematic paths, explore areas, learn about the collections, and ask questions. Up until now, service robots (Ivanov & Webster, 2019; Wirtz et al., 2018) and artificial intelligence (Kaplan & Haenlein, 2019, p.15) are not present at MAXXI.

Building Relationship

Digitalization is fundamentally changing the practices of cultural organizations, such as public museums seeking to explore the potential provided by digital technology, in order to enhance social value for their audiences and promote cross-cultural understanding, whereby some of them have successfully achieved new ways of interacting and sharing information (Rivero Moreno, 2018; Stromberg, 2013; Wang, 2014).

For instance, in the case of MAXXI the March 10 - June 1 2020 program entailed new cultural products and contents specifically studied for the lockdown phase, and the one immediately after, connecting different cultural areas, building strong relationships across the world of contemporary art, as well as architecture and design, as well as the worlds of cinema, publishing, photography and music, fostering the existing relationships and pushing new cultural contaminations among intellectuals, artists, psychoanalysts, philosophers, writers, and scientists.

Creating a new aesthetic experience

As the art museum educator Patterson B. Williams observed (2002, p. 147) - although the significance or value of a museum experience is determined by each individual visitor - it is nevertheless a worthwhile objective to try to teach visitors how to personally have meaningful experiences with art objects (Lankford, 2002, p. 147). People may be born with the capacity to contemplate, but the "skill of contemplation" must be developed, just as any other skill needs considerable honing before a level-approaching expertise can be attained. In his theory of optimal experience (Csikszentmihalyi, 1990), Mihaly Csikszentmihalyi similarly concluded that most museum visitors do not know what they are supposed to do in front of a work of art. Indeed, perplexity can make visitors feel self-conscious and embarrassed, exacerbating an already unfulfilling experience. As a result, learning is stymied. The desire to learn can be rekindled by a supportive environment, by conditions that relieve visitors of anxieties, and meaningful activities that visitors can accomplish - yet that are challenging.

In the case of MAXXI, virtual exhibitions curated by museums for educational and entertainment purposes, influence the audiences' aesthetic experience and their intention to physically visit the gallery, while targeting segments of the public that are interested in new types of interaction (Carrozzino & Bergamasco, 2010; Lee & Jung, 2019). Furthermore, the visitors' engagement in the works presented by international artists, actors and musicians, but also philosophers, scientists and psychoanalysts, eased a multisensory approach to understanding the aesthetic experience (Suess, 2018).

Audience engagement

Engaging with audiences is crucial for art museums in order to convey their social mission, as audiences have to perceive art and learn about the story behind each piece of art. The MAXXI Museum has developed a digital strategy with the purpose of audience engagement on a global scale. The program *#iorestoacasa con il MAXXI*, an internet-based broadcasting platform of cultural contents and audience engagement, represents a major digital project that was launched on March 10, 2020 (Beaumont, 2013; CGI, 2014). The virtual experience is available free of charge, and provides users with around 100,000 digital resources, including among others images, text, videos and sound of art works, photographs, and exhibition posters.

By engaging with audiences virtually to provide an alternative to the gallery visit, the public is likely to visit the gallery more frequently, thus leading to increases in customer value. The virtual center provides a global access to art, whereby disseminated audiences with a device and internet access are able to visit the gallery. This creates new value for customers, adding to the physical visit. The gallery moves closer to achieving the global objective by using digitalization and providing new ways for audiences from abroad to visit the gallery virtually. This expands cultural presence to wider audiences from different demographic contexts. Notably, the gallery achieves the main metric to measure the success of the social mission by showing art and delivering knowledge to larger audiences in order to attain a higher level of visitors, which is fundamental to maintaining legitimacy. Furthermore, on June 18, 2020, a ten-hour digital marathon was launched across all MAXXI social channels, gathering major Italian and international institutions, artists, architects, designers, critics, curators, and scientists for the Festival "A story for our future", which was broadcast live on the media partner La Repubblica website. It was an opportunity to ponder on the role, the social function and the digital potential of museums around the world, in light of the pandemic. According to Giovanna Melandri, the Museum's president.

"We celebrate the first 10 years of MAXXI with the purpose of developing ideas, proposals, and models for the next 10 to come. More than ever, we are now convinced that it is necessary to foster the social, educational and research-oriented soul of cultural institutions. With this Festival, we share our thoughts on the identity of national and world-wide museums, and the role they can play in helping to create a new world".

With a choice of featured live dialogues and video contributions, specifically shot for the occasion, the festival comprised of two sections. The first, "MAXXI across the world, or are global museums still necessary?" is a reflection on how the pandemic affected museums' role, their organization, their impressions, and their offers. The second, "Towards a new ecosystem of creation" calls on museums to become the principal laboratories to experiment and define a new ecosystem of creation, engaging wider communities and promoting multifaceted knowledge-sharing practices. This section also includes a focus on the ever-current theme of how we re-think living at home and how COVID-19 has influenced and changed the relationship between us and our homes, the latter being the very focus of the new At Home 20.20 exhibition at MAXXI. Hou Hanru, the MAXXI artistic director, explains:

"We investigate the pressing issue of how the Coronavirus has changed the relationship between contemporary creative practices and community life. It is necessary to re-think some concepts, namely our home, the sense of belonging and justice, and this need is further augmented by the

demands arising from the Black Lives Matter movement. The future lies in our long-term creative visions and the actions we take to address these urgent challenges”.

This digital project leads to the emergence of BMI outcomes and marks an innovative type of audience engagement that other museums in the field can replicate, so as to achieve a higher impact from art, and increased visitor figures.

6. Conclusion, Limitations and Future Research

This research assessed that in a cultural and creative organization, as is the case of the MAXXI Museum in Rome, the augmented and massive use of digital technologies - deployed during the Covid 19 pandemic which first forced the lockdown and then led to a heavy reduction of the public's ability to physically attend places, had the impact of deeply innovating its business model.

Therefore, this paper contributes to our understanding of the theory of business models, and how digital technologies facilitate business model innovations across cultural and creative organizations.

In the case of the MAXXI Museum, the increase of Business Model Innovation outcomes was thus examined with particular attention to digitalization, so as to understand how innovation was generated, bearing particularly significant results as regards the social role of a museum: increasing customer value, creating new value, building relationships, crafting a new aesthetic experience, and augmenting audience engagement.

However, this research bears manifest limitations. Financial and economic data were not yet available; therefore, it is not possible at this time to assess whether and to what extent the use of technology may also have positive outcomes in financial and economic terms, generating new revenues. Nor was it possible to assess whether and how a functional combination of the museum's social and marketing missions (both residuary and in support of institutional activities) are also achieved. For the purpose of sustainability (a fundamental constituent of the Business Model), this would be especially significant in view of the evidence that, as extensively happens in Europe, public museums are insufficiently funded due to national cultural policies (Nasser Alshawaaf, Soo Hee Lee, 2020).

Hence, the next step of this research (still underway) is to verify whether, thanks to technologies, digital revenue flows are in place, directly influencing the social and creative mission, and whether

there exists a synergy between social and marketing activities, even if only residuary and of a supplemental nature.

The research shows how the social mission is effectively delivered to a greater audience through a virtual experience, rather than relying on physical expansion. It would be desirable to investigate whether creative digital practices directly increased and diverted income into financing social activities, thus leading to enhanced financial autonomy and social performance.

In conclusion, we deem that our study contributes to BMI literature, as well as to the cultural and creative industries, in two ways. First, digitalization improves organizational performances of public museums in terms of social reach. As examined, ad-hoc studied digital projects deployed during the pandemic have enhanced outcomes under a social perspective, leading to the creation of new, added value.

Moreover, digitalization leads to BMI through the innovation of services used by customers to build relationships, create new experiences and engage with audiences more closely. We have shown that digitalization leads to BMI results by increasing customer value and creating new value, resulting in more visitors, first and foremost virtual.

In the following steps, the research will assess this type of organizations' strategies aimed at combining social and commercial missions as a response to an increasingly challenging operational environment.

REFERENCES

- AL-DEBEI, M. M., & AVISON, D. (2010). Developing a unified framework of the business model concept. *European Journal of Information Systems*, 19(3), 359-376.
- ALSHAWAAF, N., & LEE, S. H. (2020). Business model innovation through digitalization in social purpose organizations: A comparative analysis of Tate Modern and Pompidou Centre. *Journal of Business Research*.
- ALSHAWAAF, N., & LEE, S. H. (2020). Business model innovation through digitisation in social purpose organisations: A comparative analysis of Tate Modern and Pompidou Centre. *Journal of Business Research*.
- BEAUMONT, E. (2013). The virtual Centre Pompidou, a new strategy to acquire and publish digital content thanks to a strong sponsorship. Retrieved from <http://www.taferjournal.it/2013/02/22/the-virtual-centre-pompidou-a-new-strategy-to-acquireand-publish-digital-content-thanks-to-a-strong-sponsorship/>.
- BERRY, L. L., BOLTON, R. N., BRIDGES, C. H., MEYER, J., PARASURAMAN, A., & SEIDERS, K. (2010). Opportunities for innovation in the delivery of interactive retail services. *Journal of Interactive Marketing*, 24(2), 155–167.

- BOLTON, R., & SAXENA-IYER, S. (2009). Interactive services: A framework, synthesis and research directions. *Journal of Interactive Marketing*, 23(1), 91–104.
- BOUNCKEN, R. B., & FREDRICH, V. (2016). Business model innovation in alliances: Successful configurations. *Journal of Business Research*, 69(9), 3584–3590.
- BOUWMAN, H., NIKOU, S., MOLINA-CASTILLO, F. J., & DE REUVER, M. (2018). The impact of digitalization on business models. *Digital Policy, Regulation and Governance*.
- BRYMAN, A. (2015). *Social research methods* (5th ed.). Oxford, UK: Oxford University Press.
- BRYNJOLFSSON, E., & MCAFEE, A. (2011). *Race against the machine: How the digital revolution is accelerating innovation, driving productivity, and irreversibly transforming employment and the economy*. Brynjolfsson and McAfee.
- CARROZZINO, M., & BERGAMASCO, M. (2010). Beyond virtual museums: Experiencing immersive virtual reality in real museums. *Journal of Cultural Heritage*, 11(4), 452–458.
- COMUNIAN, R. (2011). Beyond Creative Production Networks: The Development of Intra-Metropolitan Creative Industries Clusters in Berlin and New York City by Doreen Jakob. *Journal of Regional Science*, 51(2), 420-421.
- CSIKSZENTMIHALYI MIHALY., (1990), *Flow: The Psychology of Optimal Experience*, New York, Harper and Row.
- CUCCULELLI, M., & BETTINELLI, C. (2015). Business models, intangibles and firm performance: Evidence on corporate entrepreneurship from Italian manufacturing SMEs. *Small Business Economics*, 45(2), 329–350.
- DAO, T. T., & YANG, C. (2019). Impact of interactive service on international customers' behavior intentions regarding local tourism services in Vietnam: The mediating effects of pleasant arousal and memory. *International Journal of Business & Information*, 14(1), 145–167.
- DE MAURO, A., GRECO, M., & GRIMALDI, M. (2015). What is big data? A consensual definition and a review of key research topics. In *AIP conference proceedings*, Vol. 1644, No. 1, 97-104.
- DUNFORD, R., PALMER, I., & BENVENISTE, J. (2010). Business model replication for early and rapid internationalisation: The ING direct experience. *Long Range Planning*, 43(5–6), 655–674.
- EASTON, G. (1995), *Case research as a methodology for industrial networks: a realist apologia*, in Turnbull, P.W., Yorke, D. and Naudé, P. (Eds), IMP Conference (11th): Interaction, Relationships And Networks: Past – Present – Future; 07 Sep 1995-09 September 1995, Manchester Federal School of Business and Management, IMP, Manchester, pp. 368-391
- EISENHARDT, K. M. (1989). Building theories from case study research. *Academy of management review*, 14(4), 532-550.
- FERRÁNDIZ, R. R. (2011). From cultural industries to entertainment and creative industries. The boundaries of the cultural field. *Comunicar. Media Education Research Journal*, 19(1).
- FLYVBJERG, B. (2006). Five misunderstandings about case-study research. *Qualitative inquiry*, 12(2), 219-245.
- FOSS, N. J., & SAEBI, T. (2017). Fifteen years of research on business model innovation: How far have we come, and where should we go? *Journal of Management*, 43(1), 200–227.
- GABRIEL, D. (2013). Inductive and deductive approaches to research. Retrieved from <http://deborahgabriel.com/2013/03/17/inductive-and-deductive-approaches-to-research/>
- GORDIJN, J., & AKKERMANS, H. (2001). Designing and evaluating e-business models. *IEEE intelligent Systems*, 16(4), 11-17.
- GUMMERUS, J. (2013). Value creation processes and value outcomes in marketing theory: strangers or siblings?. *Marketing theory*, 13(1), 19-46.
- HESMONDHALGH, D., & BAKER, S. (2010). 'A very complicated version of freedom': Conditions and experiences of creative labour in three cultural industries. *Poetics*, 38(1), 4-20.

- HININGS, B., GEGENHUBER, T., & GREENWOOD, R. (2018). Digital innovation and transformation: An institutional perspective. *Information and Organization*, 28(1), 52–61.
- HYDE, K. F. (2000). RECOGNISING deductive processes in qualitative research. *Qualitative Market Research: An International Journal*, 3(2), 82–90.
- IVANOV, S., & WEBSTER, C. (2019). Perceived appropriateness and intention to use service robots in tourism. In *Information and communication technologies in tourism 2019* (pp. 237-248). Springer,
- JICK, T. D. (1979). Mixing qualitative and quantitative methods: Triangulation in action. *Administrative Science Quarterly*, 24(4), 602–611.
- KAPLAN, A., & HAENLEIN, M. (2019). Siri, Siri, in my hand: Who's the fairest in the land? On the interpretations, illustrations, and implications of artificial intelligence. *Business Horizons*, 62(1), 15-25.
- KYRIAKOU, H., NICKERSON, J. V., & SABNIS, G. (2017). *Knowledge reuse for customization: Metamodels in an open design community for 3D printing*. *MIS Quarterly*, 41(1), 315–332.
- LAMPEL, J., GERMAIN, O. (2016). Creative industries as hubs of new organizational and business practices. *J. Bus. Res.*69 (2016),2327–2333.
- LANKFORD E.L., (2002), Aesthetic Experience in Constructivist Museums, *The Journal of Aesthetic Education*, Summer, Vol. 36, No. 2, pp. 140-153.
- LEE, H., JUNG, T. H., TOM DIECK, M. C., & CHUNG, N. (2019). Experiencing immersive virtual reality in museums. *Information & Management*.
- LI, F. (2007). *What is e-Business? How the Internet Transforms Organisations*. Blackwell, Oxford.
- LI, F. (2020). The digital transformation of business models in the creative industries: A holistic framework and emerging trends. *Technovation*, 92, 102012.
- LINDGARDT, Z., REEVES, M., STALK, G., & DEIMLER, M. S. (2009). Business model innovation. *When the Game Gets Tough, Change the Game*, The Boston Consulting Group, Boston, MA.
- MASSA, L., & TUCCI, C. L. (2013). Business model innovation. In M. Dodgson, D. Gann, & N. Phillips (Eds.). *The Oxford handbook of innovation management* (pp. 420–441). Oxford, UK: Oxford University Press.
- MATZLER, K., BAILOM, F., FRIEDRICH VON DEN EICHEN, S., & KOHLER, T. (2013). Business model innovation: Coffee triumphs for Nespresso. *Journal of Business Strategy*, 34(2), 30–37.
- MERRIAM, S. B. (1998). *Qualitative research and case study applications in education* (2nd ed.). San Francisco, California: Jossey-Bass.
- MESSENI PETRUZZELLI, A., & SAVINO, T. (2015). Reinterpreting tradition to innovate: The case of Italian Haute Cuisine. *Industry and Innovation*, 22(8), 677-702.
- MORT, G. S., WEERAWARDENA, J., SARGEANT, A., & BENNETT, R. (2015). Social entrepreneurship and value creation in not-for-profit organizations. In C. Colin (Ed.). *Marketing in transition: Scarcity, globalism, & sustainability* (pp. 372–376). Cham, Switzerland: Springer.
- PARIDA, V., SJÖDIN, D., & REIM, W. (2019). Reviewing literature on digitalization, business model innovation, and sustainable industry: Past achievements and future promises. *Sustainability*, 11(2), 391.
- PATTERSON B. WILLIAMS, (1992), Object Contemplation: Theory into Practice, in *Patterns in Practice*, Washington, D.C.: Museum Education Roundtable.
- PELTONIEMI, M. (2015). Cultural industries: Product–market characteristics, management challenges and industry dynamics. *International journal of management reviews*, 17(1), 41-68.
- PETRUZZELLI, A. M., & SAVINO, T. (2014). Search, recombination, and innovation: Lessons from haute cuisine. *Long Range Planning*, 47(4), 224-238.

- PRATT, A. C. (2009). The creative and cultural economy and the recession. *Geoforum*, 40(4), 495-496.
- PRATT, A. C., & JEFFCUTT, P. (2009). *Creativity, innovation and the cultural economy*. Routledge, London.
- RAGIN, C. C., & BECKER, H. S. (1992). *What is a case?: exploring the foundations of social inquiry*. Cambridge university press.
- RICHTER, M. (2013). Business model innovation for sustainable energy: German utilities and renewable energy. *Energy Policy*, 62, 1226–1237.
- RIVERO MORENO, L. D. (2018). Museums and digital era: Preserving art through databases. *Collection and Curation*, 38(4), 89–93.
- SPIETH, P., SCHNECKENBERG, D., RICART, J.E. (2014). Business model innovation – state of the art and future challenges for the field, *RD Managing*, 44 (3), 237–247
- STAKE, R. E. (1995). *The art of case study research*. London: Sage.
- STROMBERG, J. (2013). What Digitization will do for the Future of Museums. *Smithsonian Magazine*, 29.
- SUESS, A. (2018). Instagram and Art Gallery Visitors: Aesthetic experience, space, sharing and implications for educators. *Australian art education*, 39(1), 107.
- SVAHN, F., MATHIASSEN, L., & LINDGREN, R. (2017). Embracing digital innovation in incumbent firms: How Volvo Cars managed competing concerns. *MIS Quarterly*, 41(1), 239–253.
- VISNJIC, I., WIENGARTEN, F., NEELY, A., (2016). Only the brave: product innovation, service business model innovation, and their impact on performance. *J. Product. Innov.Manag.* 33 (1), 36–52.
- WANG, Y. (2014). The role of large enterprises in museum digitization. *Conservation Science in Cultural Heritage*, 14(2), 67–72.
- WIRTZ, J., PATTERSON, P. G., KUNZ, W. H., GRUBER, T., LU, V. N., PALUCH, S., & MARTINS, A. (2018). Brave new world: service robots in the frontline. *Journal of Service Management*.
- YIN, R. K. (2017). *Case study research and applications: Design and methods* (6th ed.). Thousand Oaks, California: SAGE Publications.
- YIN, R.K., (2014). *Case Study Research: Design and Methods*, 5th ed. Sage, Newbury Park.
- ZOTT, C., AMIT, R., MASSA, L., (2011). The business model: recent developments and future research, *Journal of Management*. 37 (4), 1019–1042.

Ways of Engagement

Emel Pilavcı
ATÖLYE, Turkey
emel@atolye.io

Emre Erbirer
ATÖLYE, Turkey
emre@atolye.io

ABSTRACT

Effective collaboration among people from different disciplines and skill sets is necessary to maximise the potential benefits of transdisciplinarity for new business models around problems and the future of work. This paper analyses the co-design processes during and after times of crisis to tackle problems as well as addressing the benefits of transdisciplinary approaches, skills and methods. The paper also concretises the steps of measured impact throughout occasions of digital clustering, such as hackathons, to create a guideline for new learning alternatives, interdisciplinary engagement and promising *future of collaboration and learning* approaches in order to tackle wicked problems. This paper focuses on interdisciplinary collaboration for the growth of creative industries, status analysis during COVID-19 times, the effect of digital clustering means, hackathons and programmes during the pandemic and co-design sessions with creative individuals, academy and private sector partners. The co-design process and engagement of skill sets, backgrounds and stakeholders for combating a global problem may provide an example for innovative and participatory business models.

Keywords:

Interdisciplinary,
collaboration,
hackathon, future of
work, innovation

ACKNOWLEDGEMENTS

As the co-authors of this paper, Emel and Emre, we would like to express our special thanks to our dear teammate Gülnaz Ör for her sincere efforts and time devoted to adding valuable parts and content to this paper, as well as to Melissa Clissold, Gizem Ünsalan and Celal Değerli for their editing and guidance through the crafting of words.

Ways of Engagement

Paul Stock and Rob J. F. Burton divide heterogenised knowledge transfer into three distinct levels of integration: Basic collaboration (Multidisciplinarity), new knowledge creation (Interdisciplinarity) and fully integrative synthesis (Transdisciplinarity). From our standpoint, each of these levels has a common trait of bringing together individuals from different disciplines in order to propel out-of-the-box thinking and problem-solving. However, a transdisciplinary model inherently requires creating a “unity of intellectual framework beyond the disciplinary perspectives”, therefore necessitating an effective transfusion of the interdisciplinary input (Institute of Applied Creativity for Transformation (IACT), 2017).

“Interdisciplinarity” has become an initial asset to create for the actual needs of the world, and it has been establishing new ways of exploration and expression for all sectors, especially creative industries. However, during the pandemic, physical interactions were reduced as the crisis forced industries to slow down. As most institutions had to search for chances to survive, the solution was not singular nor the same for all institutions. During unexpectedly turbulent times, traditional and familiar systems gave us a vision and allowed us to conclude that there was a need to build strong, fluid and reinforceable systems and connections.

1. Interdisciplinary Engagements

Interdisciplinary teams composed of members with different areas of expertise possess a variety of perspectives, which increases their potential for innovation. “Innovation requires the development of entrepreneurial skills in order to provide a new approach to the work and solutions to a challenge in the corresponding ecosystem.” (Zahra, 2020). Interdisciplinary research and collaboration can provide substantial benefits to scientists, practitioners and policy makers, and experts predict that the future of research is increasingly interdisciplinary. Interdisciplinarity is commonly considered *as a means to address complex problems that cannot be dealt with from a single disciplinary perspective alone*. Such problems require people from different disciplinary perspectives to work together, sharing ideas, theories and practice to reach appropriate solutions. For interdisciplinary work to be effective in addressing these problems, the conditions must allow for appropriate interactions to be fostered among actors, including those from any stage in their careers.

Some pioneer institutions such as the MIT Media Lab, Stanford’s d.school, NYU Tisch ITP, Parsons School of Design, Copenhagen Institute of Interaction Design and KAOSPILOT describe themselves as a “research lab that encourages the unconventional mixing and matching of seemingly disparate research areas”, which enhance young creative minds. Through their unconven-

tional approaches, diverse curricula and mixed methodologies, these institutions challenge students, enabling them to become talented problem solvers in their early careers.

2. Navigating Through the Crisis and Digitalisation

Following the identification of COVID-19 at the end of 2019, it only took three months for the virus to transform into a pandemic that overtook the world with unexpected speed. The crisis brought with it new conditions that required sudden and worldwide adjustment, with a multilayered impact on individuals, societies and systems. According to the definition of “crisis” in the dictionary, it follows that a crisis may have negative consequences for established business models if it is not effectively managed (Coombs, 2007). However, crises may also bring new opportunities: A crisis can often give rise to new business models that encompass new capabilities, new value propositions and demonstrations, as well as addressing new customer needs. In the words of Stanford economist Paul Romer in 2004, “a crisis is a terrible thing to waste” (Ritter & Pedersen, 2020). The impact of the pandemic and measures to prevent it have led to discussions about epidemic preparedness and the adaptability of systems. The world has faced – politically, economically, socially and clinically – vulnerability in most important systems such as healthcare, business and education. The crisis has had unbalancing effects on many fronts, from hospitality and technology to social life and e-commerce. Using this as our starting point, we asked ourselves some questions: What could have been done to alleviate the harm? How might we develop resilient systems that can thrive and create impact at all times?

According to P. L. Sacco (2020):

In the pursuit of the answers, the cultural sector and creative industries have innovated rapidly, notably with accelerated digitalisation. Massive digitalisation coupled with emerging technologies, such as virtual and augmented realities, can create new forms of cultural experience, dissemination and new business models with market potential. With the lockdown, many public and private providers moved content on-line for free to keep audiences engaged and satisfy the sharply increased demand for cultural content. While the provision of free and digitally mediated cultural content is not sustainable over time, it has opened the door to many future innovations. To capitalise on them, there is a need to address the digital skills shortages within the sector and improve digital access beyond large metropolitan areas, with the additional consideration that digital access does not replace a live cultural experience or all the jobs that go with it.

3. Concretised Examples: Online Hackathons

Throughout the COVID-19 crisis, ATÖLYE has curated online events and programs with stakeholders from different sectors, reached out to most beneficiaries, developed partnerships and created open digital spaces for sustainable, innovative and impact-oriented approaches. The word *hackathon* is a portmanteau (a linguistic blend of words) of *hack* and *marathon*, where the word *hack* is used in the sense of exploratory programming, to emphasize a design sprint event that entails intensive collaboration on projects geared towards a focused area. The goal of a hackathon is to create functioning software or hardware by the end of the event, which can last 24 to 48 hours and be held either online or offline. Some hackathons may have a large amount of corporate sponsorship and interest, and the area of focus may vary from societal issues to climate change, from video game development to mobile applications (Medina Angarita & Nolte, 2020). Coronavirus-focused hackathons started with the first Hack the Crisis, held in Estonia; the event's goal was to develop innovative solutions through multidisciplinary collaborations for areas most affected by COVID-19, as well as to develop future improvements for the post-crisis period (AccelerateEstonia, 2020). Hackathons offer an opportunity to achieve innovation-oriented goals with limited resources. This is to be accomplished by engaging a dynamic population of volunteer technologists, social scientists, engineers, designers and makers to develop applications, products or services that approach persistent problems in innovative ways (Bastian, 2013).

Beginning with Hack the Crisis Turkey, steps were taken towards the goal of endorsing change and solidarity to produce new alternatives. The event followed Hack the Crisis editions around the world, similarly emerging from the inspiration and entrepreneurial spirit of bringing together individuals from different disciplines to produce solutions for an acute problem. ATÖLYE continued its efforts with #EUvsVirus led by the European Commission, as well as Hack the Normal in collaboration with Arçelik, the biggest multinational technology company in Turkey, to empower creatives and entrepreneurs to create innovative and sustainable solutions while designing for the “new normal” in the post-crisis reality (ATÖLYE, 2020a; European Commission, 2020). The tools of digital clustering platforms brought together important actors who play a role both in the current operations and in designing systems for an agile and sustainable future. This approach offered new ways of learning participatory design, separating the learning experience from a concrete space and hierarchical structured roles. Throughout the hackathons, participatory learning processes included private sector actors, professionals, creative individuals, entrepreneurs and students from diverse backgrounds and different disciplines, who all collaborated on building an instant structure over 48 hours. ATÖLYE initiated a digital transformation during the crisis and encouraged its interdisciplinary creative community to take on roles such as *coach*, *mentor* and *creative*, thus enabling them to offer their skills and visions to participants who were developing products and services. For

each step, a circle of learning-teaching-practicing was drawn with multiple interactions along different aspects; in other words, the products and services were developed with a continuously interdisciplinary approach and constant collaboration. Digital tools were used to conduct the operations, instant communications, sessions, talks and community curation. After the hackathons, ATÖLYE shared the outcomes with investors and partners, following up for monitoring and supporting the development process for each idea and project.

The hackathons started with an open call in which all applications are evaluated according to the following criteria: *an innovative approach to the problem, applicability, method, strategy and paying regard to gender, sector and disciplinary balance in order to create diverse and multidisciplinary communities for each event*. Digital tools such as Zoom, Slack, Calendly, Google Drive, Airtable, Devpost and Typeform were used both in the preparation period as well as during and after the hackathons, for purposes such as live group meetings, setting appointments with mentors, community engagement, instant messaging and documentation.

4. Hack the Crisis Turkey

The spread of the pandemic generated a new order and routines that required everyone to quickly adapt. Our routines and comfort zones changed in many areas, from healthcare to social life, economy and education. Meanwhile, initiatives around the world needed to collaborate in their aim to create alternatives for all these changes. After the first days, the initiatives gathered in Estonia, taking a step towards generating the first response by developing an online hackathon that offers technological solutions both during the crisis and beyond. The partnership between Garage 48 and Accelerate Estonia grew to encompass 30 teams working in different fields such as healthcare, education, media, coaching, community curation and remote working, with more than 860 people generating 96 ideas over six hours. A collaborative effort between the public and private sectors, the first online hackathon focused on this particular crisis was held from 13 to 15 March 2020 (Accelerate Estonia, 2020; Idea Garage, 2020). Called Hack the Crisis, the initiative also served as a source of inspiration for the transformative and restorative power of communities in the face of problems. Following the initial show of digital solidarity, many countries began searching for ways to overcome the crisis together during this crucial time, when the pandemic was quickly gaining ground but could still change its course if the right steps were taken. After the second hackathon was held in Latvia, the initiative went global, with hackathon series taking place in 19 countries, including Turkey.” (Hack the Crisis Turkey, 2020).

Placing participation and solidarity at its core, Hack the Crisis Turkey sought to discover what new opportunities could be created in the middle of the crisis. The online hackathon functioned as a method for mobilizing the communities and clustering different disciplines that covered different expertise and models to face problems. Held digitally from 27 to 29 March 2020, the hackathon demonstrated the importance of engaging actors from different spectrums and co-designing for sustainable and innovative solutions as a part of the global movement – especially for combating the societal effects of this unexpected worldwide crisis. The hackathon hosted more than 500 participants in 11 open sessions. Forty teams – composed of more than 130 individuals – received support from 120 mentors and creatives in developing their project ideas. The event proved that 800 people from different backgrounds such as engineering, social sciences, design, software, programming, arts, education, architecture, facilitation, communications, storytelling and strategy could gather around a common goal in a short time (ATÖLYE, 2020b). The projects that drew support and are still active following the hackathon include Covoucher, the first digital voucher platform to support small businesses at the local level during the pandemic, which was ranked among the World Economic Forum's cohort of 15 innovative solutions addressing COVID-19 (Schwere, 2020).

5. #EUvsVirus

The European Commission, led by the European Innovation Council and in close collaboration with the EU member states, hosted a Pan-European hackathon to connect civil society, innovators, partners and investors across Europe in order to develop innovative solutions for coronavirus-related challenges. The online hackathon was held from 24 to 26 April. The event drew participation from more than 20,900 people across Europe and beyond, with 2,150 solutions submitted in areas including health and life, business continuity, remote working and education, social and political cohesion, digital finance and other challenges.

#EUvsVirus is the mission-driven initiative that has proven to be extremely efficient in the fight against the unexpected and world-changing challenge of COVID-19. This Pan-European hackathon created 2,164 multi-disciplinary, multi-nationality teams with innovative solutions and then sparked the development of 2,235 new Cross-European partnerships by matching the best 120 teams with 500+ supportive partners from the public and private sectors.

The hackathon stated itself as a new way of working among public administrations (European Commission and 27 member states), purpose-driven innovators, entrepreneurs and the actors of civil society based on the principles of solidarity, collaboration and empowerment through solidarity. *#EUvsVirus* functioned as a startup, a mission-driven team of 600 volunteers and Commission

members from seven departments, led by the European Innovation Council. The council has declared that it took risks and worked under uncertainty; it has pivoted several times to adapt to changing situations, all while using the latest technologies to be able to scale-up (European Commission, 2020).

The *#EUvsVirus* initiative also triggered the emergence of a new pan-European community of purpose-driven innovators, entrepreneurs and members of civil society. This new community is the foundation of a future innovation ecosystem ready to solve social problems using the power of technology, belonging and transdisciplinary approaches. Furthermore, *#EUvsVirus* kick-started a truly European sentiment based on the values of solidarity, creativity and hard work. Last but not least, *#EUvsVirus* has demonstrated that it is possible to do policy making outside the traditional arena (European Commission, 2020).

6. Hack the Normal

Organised by ATÖLYE and led by Arçelik, this hackathon served as an example of the private sector taking a step towards building a better future with a focus on *healthy living, social life and sustainability*. Hack the Normal engaged 217 participants, 180 mentors, 10 coaches and 111 partners from 34 cities and five countries. The diverse group of participants – whose ages ranged from 17 to 60 years – were able to co-design solutions from various perspectives, backgrounds and disciplines thanks to digital tools, which allow for fruitful interactions and serve as a way for communities and initiatives to experience collaboration while unable to experience the comfort of physical interactions. Under such circumstances, many new technologies have emerged, and users have embraced these technologies as they continue to adapt to the changing world (ATÖLYE, 2020a).

As a company that offers technological and organisational structures that enable the realisation of ideas as well as projects that adhere to its vision of digital transformation, Arçelik took another pioneering step with Hack the Normal, seeking to effectively manage the dynamics brought about by the global COVID-19 crisis. Whereas participants performed face-to-face under "normal conditions", the digitalisation of hackathons also lent new dimension to the events. For instance, many people who could not come together in a physical environment participated from different cities, coming together digitally to generate ideas and find solutions.

7. Results and Impact for All Actors

Having hosted more than 1,000 participants, mentors, creatives, corporates and investors provided ATÖLYE with the gift of countless learning experiences and opportunities. These digital collaboration opportunities have had a total impact on all actors along their solution-seeking journeys. Participants from different backgrounds, social groups, ages, geographies, perspectives, ways of thinking and approaches were able to find possibilities, to co-build the process of actualising a product or service. While they all brought their unique theoretical knowledge and practical experiences to their teams, throughout the experience of constructing the work step-by-step, participants found that each element was there to meet, interact with and complete one another to create a robust system. Having come together in such an environment, even digitally, participants were able to set a simultaneous sequence, with deep focus in the building process. They were also empowered by related content, mentorship, coaching, presentations and inspirational talks, which opened the door to entrepreneurial creativity. As intensive and focused events, hackathons are seen as a great way to reinvigorate a company's innovation culture and capabilities and as sustainable open innovation (Bastian, 2013). Having a structured programme and a limited amount of time while working together for long hours in either a physical or digital environment, engaged in an intense thinking and making process – we believe these circumstances are what ignite the participants' creativity.

The participants of all digital impact-oriented activities that were held by ATÖLYE in this period – such as Hack the Crisis Turkey, #EUvsVirus, Hack the Normal, Istanbul Service Jam 2020 (UNDP, 2020a) and Global Goals Jam Istanbul (UNDP, 2020b) and COVID-in-Residence project that was funded by Istanbul Development Agency – were able to develop meaningful relationships and networks with the other participants, as they shared a common big goal and undertook the same experience. Working with the mentors, creatives and facilitators in this process also opened up new discussions and formed brand-new perspectives for participants to approach the solution with design thinking methodology. On the other hand, most of the groups who were involved in these digital events could take their MVPs (Minimum Viable Product) further beyond the scope of the events. As a result of the fruitful collaboration and network they formed, the teams continue to develop their products and services, meeting investors and partners to create further opportunities up to the present. As mentioned above, the Covoucher project, which emerged from Hack the Crisis Turkey as the first digital voucher platform to support small businesses at the local level during the pandemic, was selected to the World Economic Forum's cohort of 15 innovative solutions addressing COVID-19 (Schwere, 2020).

Such events have an impact not only on the participants and creative professionals, but on corporates and investors, as well. Hackathons, jams and intense ideation sessions play an important role in igniting creativity by obtaining a rapid result through prototypes and MVPs. Thus, investors are able to follow the process from ideation to concretisation and the first iteration of the product or service, allowing them to be involved for further development. Since the digitalisation of business processes starting with COVID-19, corporates have held internal and external hackathons in order to cluster the ideas, creative minds and makers in a given context. They have also used the outputs, ideas and products whose initial development began during these events.

The problems of today's world and the century we live in are complicated. The concept of VUCA, which entered our lives in the 2000s, describes the period we are in as "variable, uncertain, complex and ambiguous". This requires us to take steps to recognise the complex nature of problems and to address them properly while generating new solutions to existing problems. However, dealing with these challenges is not in the hands of a single institution; nowadays, joint design is a must. At this point, we need to use design as a tool to make abstract expressions concrete while developing new solutions to problems. These online hackathons and programmes show us how powerful, resilient and important we are by facing these problems.

COVID-19 crisis has left individuals, communities and systems under a multi-layered influence. In many areas – from healthcare to social life, economy to education – it has replaced routines and comfort zones with new and rapid adaptation. At this point, events held in a digital environment and the solutions sought within have become an acute solution to the crisis we are experiencing. While many institutions were unaware of the phrase "digital transformation", they found themselves organising virtual events and preparing digital guides and remote working kits. This, unfortunately, brought about a process that more idle and traditional institutions saw as "temporary," so they tried to adapt with the systems that were familiar to them. However, for some institutions, this transformation was an opportunity. We will only be able to see the impact of this process, and whether it produces faster and more effective results, in the coming years.

These initiatives once again demonstrated the importance of always starting with research. We need to fully grasp the issue that we deal with as a "problem", define the problem clearly and identify the beneficiaries of the solution we develop. After determining the research question clearly, we have to move on to the design phase. When you use design as a problem solving method, you get the chance to transform an abstract expression into a concrete structure. Then, you move on to prototyping and testing this concrete structure. This gives you the opportunity to interact directly with the beneficiary. At this point, issues such as establishing radical collaborations, adopting a participatory design approach and learning together are the steps you need to follow.

8. Engaging Creative Freelancers Back in the System

COVID-19 has brought major changes that will profoundly impact the global business environment and international ventures, and it is expected to continue to affect these businesses for years to come. Epidemics have this effect (Wright, 2020) of changing how people live, think, transact and organise their societies. The most important changes brought about by COVID-19 to date are damaging long-standing institutions, reshaping the global supply chains, disrupting existing businesses and personal networks and undermining the flow of knowledge, technology capital, ideas and people across international borders. While each of these changes can cripple international ventures' business activities, their joint effect is likely to be even more devastating because these changes are interconnected (Zahra, 2020). In such circumstances, creative industries and creative professionals who worked as mentors, coaches and creatives during the hackathons, service jams and related projects are largely affected by the social and economical crisis.

As well as the participant individuals and teams, these digital clusterings have also made an impact on mentors, coaches and creatives. Throughout these activities, they were able to form a technical, creative and entrepreneurial support circle; they were also able to meet the teams and their novel problem solving ideas in the given context. The activities and have found the possibility to meet the teams and their novel ideas of problem solving in the given context. Besides being a part of the approach, they accelerated the system with their ideas, feedback, entrepreneurial experiences and technical knowledge.

On the other hand, the status of creative freelancers as one of the groups poised to be most affected by the crisis has been another motivation for ATÖLYE to keep them in the productive cycle. Research indicates that creative freelancers have been the group most affected by COVID-19. According to P. L. Sacco (2020), the effects of the crisis on creative industries and the drop in investment by the sector is expected to affect the production of cultural goods and services and their diversity in the months, if not years, to come. Cultural and creative sectors are largely composed of micro-firms, non-profit organisations and creative professionals, often operating on the margins of financial sustainability. Large public and private cultural institutions and businesses depend on this dynamic cultural ecosystem for the provision of creative goods and services. Thus, this reveals the circular effect of the crisis on creative freelancers and creative industries.

Another study on creative freelancers, led by the European Creative Business Network, as well as a survey of 6,000 individuals conducted by Kreatives Sachsen, indicate that creative freelancers as well as small and medium-sized enterprises are expected to have losses of 10% to 75% by the end of 2020 (European Creative Business Network, 2020). Thus, new models of sourcing and support mechanisms are considered and have even begun to operate. According to the European Creative

Business Network's Breaking out of the COVID-19 Crisis Restarting the Cultural Creative Industries is at the centre of an open and sustainable Europe paper;

National and local governments across the globe have introduced multiple measures that support workers and firms in light of COVID-19. Many of them, particularly those not targeted to cultural and creative sectors, are not well suited to the peculiarities of the sector. Employment and income support measures are not always accessible or adapted to the new and non-standard forms of employment (freelance, intermittent, hybrid – e.g. combining salaried part-time work with freelance work) that tend to be more precarious and are more common in cultural creative sectors.

In this time of uncertainty, creative industries and freelancers working within this ecosystem are the group viewed as most easily dispensable during a crisis (Sacco, 2020). For all these reasons, it is important to keep the creative freelancers within the system to benefit from their diverse experiences, knowledge and mobility.

In the light of this approach and vision, the interdisciplinary interaction that takes place within ATÖLYE is enabled by the organisation's diverse community. Consisting of individuals working in different professional areas such as creative industries, social sciences, business development, technology, engineering and architecture, the community continuously generates new ideas, prototypes them and shares experiences with one another. Curating the interdisciplinary community and sustaining the interactions hold great importance within such a business model. Creating the right balance of interests and talents through community curation can be the key to interdisciplinary production. ATÖLYE believes that innovative projects and unexpected breakthroughs can only emerge from the right mix of people. The purpose here is to create a learning environment in which community members fulfil their needs professionally and socially, build capacity, reveal their own potentials and collaborate on projects that could create long-term value. Projects that come to life through this vision open up spaces for new ideas, identities and perspectives to flourish. Bringing many people together with different backgrounds enables the projects to create and sustain fruitful collaborations among individuals and institutions to develop and make a difference with their multi-stakeholder structures (ATÖLYE, 2020c).

9. Future Aspects and Conclusion

While the impact-oriented digital clusters came to life, a wider challenge question was formed with the contribution of a wide spectrum of actors: "How might we design a learning and collaboration system with transdisciplinary engagement for creative industries?" Thus, ATÖLYE approached the

case by diversifying and enhancing the programmes and projects in order to answer the design question. On the other hand, through the pandemic and recession following it, it was important to create resources and spaces for creative individuals to help them stay in the game. Besides, if workflows can adapt to embrace innovation and critical thinking, co-design processes and participatory approaches can help communities, businesses and institutions to develop healthier growth opportunities, as stated in the Deloitte Insights published in May 2020.

An important topic for building the future is the optimal level of preparedness, as “the COVID-19 crisis highlights differences in businesses' crisis preparedness” (Ritter & Pedersen, 2020). Primary research on the economy and its effect on creative industries has demonstrated that cultural institutions, communities, learning and business systems need to shift in accordance with post-pandemic realities. The institutions need new collaborative working practices, further digitisation, community engagement models, mobility of sources and agile structures to survive and thrive in the long term in order to create further opportunities. Post-COVID-19 insights and current positioning show us that organisations are actively seeking creative responses via callouts led by the governments and institutions. Designers are being engaged in different ways across service redesign, and they seek to collaborate and draw on one another's experience and skills, as the Design Council reflected (Ritter & Pedersen, 2020).

As physical boundaries have disappeared, the COVID era has actually caused interdisciplinary boundaries to lose their clarity due to the changing economy and ways of doing business. This period, which breaks the norms up to now, also offers many insights on how future business practices will change. With these changes, it has emerged that, in today's business world, organisations must be tolerant of long-term disruptions, slow response times, costly system updates and inflexible business processes (KPMG Türkiye, 2020). It is evident that organisations who have an interdisciplinary approach will be more flexible in times of conflict. For this reason, agile organisations are adapting faster to long-term disruptions. An interdisciplinary understanding and approach formed by the combination of disciplines that seem independent from each other at first sight is very crucial in this setting.

According to an article written by the social innovation platform imece, people often perceive the outside world in a holistic approach; their attempts to find solutions to the problems they encounter or the way they communicate with others is not limited to knowledge and skills specific to certain disciplines). Questions asked and answers given in daily life generally fall within the subject area of more than one discipline. Moreover, it is not possible to examine these emerging fields within the narrow scope of traditional disciplines (Lopez, I & Kılıç, M, 2020). In the light of such implementa-

tions and approaches; the interdisciplinary, mobile, versatile working models and digital transformation can enable multi-layered opportunities for institutions to survive and thrive. New ways and means of meaningful interactions beyond physical, should be re-think and evaluate.

REFERENCES

- Accelerate Estonia. (2020). *Hack The Crisis - Estonia* <https://accelerateestonia.ee/en/hack-the-crisis/> (Accessed: 20.09.2020)
- ATÖLYE. (2020a). *Hack the Normal*. <https://hackthenormal.com/> (Accessed: 20.10.2020)
- ATÖLYE. (2020b). *Hack the Crisis Turkey*. (2020). <https://hackthecrisisturkey.com> (Accessed: 20.09.2020)
- ATÖLYE. (2020c). *Community Section*. <https://atolye.io/en/community/> (Accessed: 20.10.2020)
- Bastian, Z. (2013). The Power of Hackathons: A Roadmap for Sustainable Open Innovation. *Wilson Center Policy Meme Series*, 3. Retrieved from http://www.wilsoncenter.org/sites/default/files/power_hackathons.pdf
- Coombs, W. T. (2007). Protecting Organization Reputations During a Crisis: The Development and Application of Situational Crisis Communication Theory. *Corporate Reputation Review*, 10(3), 163–176. <https://doi.org/10.1057/palgrave.crr.1550049>
- Deloitte Insights. (2020). Returning to work in the future of work. Retrieved from <https://www2.deloitte.com/us/en/insights/focus/human-capital-trends/2020/covid-19-and-the-future-of-work.html>
- European Commission. (2020). *Eu vs. Virus*. <https://www.euvsvirus.org/> (Accessed: 20.09.2020)
- European Creative Business Network. (2020). Breaking out of the COVID-19 Crisis: Restarting the Cultural Creative Industries is at the centre of an open and sustainable Europe. *White Paper*. Retrieved from https://ecbnetwork.eu/wp-content/uploads/2020/04/ECBN_White_Paper_CCI-@Covd19_20200409.pdf
- Idea Garage. (2020). *Hack The Crisis: Global Hackathon Series*. <https://garage48.org/hackthecrisis>
- KPMG Türkiye. (2020). İş Sürekliliği, Kriz Yönetimi ve Covid-19. Retrieved from <https://home.kpmg/tr/tr/home/gorusler/2020/03/covid-19-is-surekliligi-kriz-yonetimi.html>
- Lopez, I & Kılıç, M. (2020). *Disiplinlerarası Etkileşim*. Healthy Individuals and Societies Report. Imece Platform <https://medium.com/imeceplatformu/9-disiplinleraras%C4%B1-etkile%C5%9Fim-89b4c186ee6c> (Accessed: 05.09.2020)
- Medina Angarita, M. A., & Nolte, A. (2020). What do we know about hackathon outcomes and how to support them? – a systematic literature review. *Lecture Notes in Computer Science (Including Subseries Lecture Notes in Artificial Intelligence and Lecture Notes in Bioinformatics)*, 12324 LNCS(September), 50–64. https://doi.org/10.1007/978-3-030-58157-2_4
- Ritter, T., & Pedersen, C. L. (2020). Analyzing the impact of the coronavirus crisis on business models. *Industrial Marketing Management*, 88(May), 214–224. <https://doi.org/10.1016/j.indmarman.2020.05.014>
- Sacco, P. L. (2020). Culture shock: COVID-19 and the cultural and creative sectors, (ber), 1–55.
- Schwere, A. (2020). *These 15 innovations are helping us fight COVID-19 and its aftermath*. World Economic Forum Geneva. <https://www.weforum.org/agenda/2020/09/these-15-innovations-are-helping-us-to-fight-covid-19-and-its-aftermath> (Accessed: 20.09.2020)
- United Nations Development Program (UNDP). (2020a). Global Service Jam. <http://globaljams.org/>

(Accessed: 20.09.2020)

United Nations Development Program (UNDP). (2020b). Global Goals Jam.

<https://globalgoalsjam.org/> (Accessed: 20.09.2020)

Wright, L. The New Yorker; 2020. *Annals of history: Crossroads. A scholar of the plague thinks that pandemics wreak havoc—and open minds*, 18-23.

<https://www.newyorker.com/magazine/2020/07/20/how-pandemics-wreak-havoc-and-open-minds>

Zahra, S. A. (2020). International entrepreneurship in the post Covid world. *Journal of World Business*, (July), 101143. <https://doi.org/10.1016/j.jwb.2020.101143>

Digital needs?: supporting arts festivals' transition to programming a blend of live and digital experiences

Dr David Teevan

Independent Researcher

Ireland

david.teevan@ucdconnct.ie

Orcid # <https://orcid.org/0000-0002-2746-3553>

ABSTRACT

Among the many unforeseen consequences of the Covid pandemic has been the emergence of arts festival programmes online. As the year has progressed there is evidence of the ushering in of a new era of festival making that will see festival programmes incorporating a blend of digital and live experiences. For festival organisations this has meant a significant shift in operational focus. Using a mixed-methods ethnographic research methodology incorporating participant observation and semi-structured interviews, this paper provides an immediate, empirically evidenced, qualitative perspective on the sectors response to the unprecedented events of 2020. Utilising a theoretical framework that understands festival making as a socially engaged creative act, the research interrogates the consequences of this turn for festival organisations and the knock-on implication for policy makers and funding organisations?

Keywords:

Festivals
Digital pivot
Coronavirus
Ireland
Networked
structure

ACKNOWLEDGEMENTS

I would like to thank Ruth McGowan (Director, Dublin Fringe Festival) and Paul Brown (Director, Earagail Arts Festival) for their time and considered responses to this enquiry. I would also like to thank Prof. Emily Mark Fitzgerald and Dr Victoria Durrer in the UCD Department of Arts History and Cultural Policy for their ongoing support and mentorship. Finally I would also like to thank Karl Wallace (Head of Festivals at The Arts Council/An Chomhairle Ealaíon) and Dr. Niamh NicGhabhann (University of Limerick) for the many rich exchanges of ideas around festival making we have had that have informed my thinking on this field of practice.

The coming of Covid-19

On the 14th February 2020 over 200 festival makers, academics, funders and other stakeholders gathered together in University of Limerick for the Change Makers conference. This event, an initiative of the Arts Council of Ireland, set out:

...to map, measure and gather intelligence about arts festivals and better understand their scope and impact in civic society, to focus on the creative practice of festival-making and to explore the ways in which this can be supported and developed in order to enhance the transformative power of festivals within society.

(Wallace, 2020)

The underlying mood at the conference was one of excitement about the year ahead, as festival makers shared their enthusiasm for the programmes they had been devising with artists and community partners over the winter months. At that time Coronavirus was something that was happening far away, and talk of it did not permeate the enthusiastic exchanges of the delegates. One month to the day after this event Ireland entered lockdown, and with that the plans and projects of this vibrant community were thrown into disarray.

Faced with restriction of movement and public assembly, Irish arts festivals scheduled for late March and April 2020 had little option but to cancel. As the period of isolation extended, festival makers began turning to digital technologies to allow them to fulfil their commitment to artists (to platform their work) and the public (to be an access point for encountering the arts). Beginning at the very end of April, festival organisations started to deliver their programmes online using web-based platforms like Facebook and Youtube. As social distancing regulations eased, live performances began to reappear alongside, and in some cases interwoven with, work that was created to be experienced digitally. However, this respite was short lived as increasing Covid-19 infections in late August precipitated a renewal of restrictions. Unbowed by these unprecedented challenges Irish arts festivals have continued to operate, exploring and experimenting with alternative models of transmission that maintain their commitment to being a conduit for cultural discourse. With continuing uncertainty surrounding gatherings and the likelihood that public interactions will need to be curtailed until the middle of 2021 at least, the blending of live and digital events that emerged during 2020 looks set to be a feature of festival programmes for the foreseeable future.

It will be some time before the longer-term cultural, societal and economic ramifications of the re-imagining of festivals during 2020 will be known. In the interim there is however much that can be learned by examining the operational challenges festival organisations faced and the myriad solu-

tions they devised to ensure that these important touchstone events in the annual calendar went ahead. Using a mixed-method ethnographic research methodology incorporating participant observation and semi-structured interviews, this research considered the 2020 programmes of Earagail Arts Festival (July 9th–26th) and Dublin Fringe Festival (September 7th–22nd), two of Ireland’s larger established multidisciplinary arts festivals. Issues considered included the learning trajectory of the core team, the cost and challenges of embracing digital technologies and the implications this year’s pivot to digital transmission will have on future festivals. The research provides valuable insights for both festival makers and arts policy writers. Before turning to these case studies, some consideration will be given to the contribution this paper makes to the field of Festival Studies, the theoretical framework and methodology used in the research, and the wider historical context of festival making in Ireland.

The cross disciplinary interest in festivals

Over recent decades festivals of all shapes and sizes have become a ubiquitous part of the social and cultural life of European urban and rural communities. So much so that they have been described as being “one of the dominant formats in the current cultural realm” (Sassatelli, 2015: 28). While much of this growth has been driven by tourism (Mair, 2019; Larson et al., 2015; Newbold, 2015), the mounting of a festival, even a one-day event, is a complex operation involving myriad stakeholders that is likely to be simultaneously working on a number of diverse, though often inter-related objectives. These may include increased economic prosperity for local business as a result of tourism, but can also include urban regeneration, education, enhancing civic pride, and community development (Getz et al., 2019: 42).

The multifaceted nature of the festival ecology has attracted the interest of researchers from many different disciplines, including geography, economics, anthropology, sociology, and business. In recent years these disparate studies have been drawn together under the banner of Festival Studies in an attempt to provide a more cohesive perspective on these events, which are such an important part of contemporary life (Mair, 2019; Newbold and Jordan, 2016). As noted by Alesandro Testa, this nascent discipline is built on an extensive body of “historical and anthropological literature about festivities”, and follows Émile Durkheim’s recognition of the “importance of investigating public events” as an essential element to understanding social life (2019: 6).

This paper adds to the growing body of Festival Studies literature, providing an immediate, empirically evidenced, qualitative perspective on the sector’s response to the unprecedented events of 2020, with a particular focus on the sector’s pivot to the use of digital technologies. While recognis-

ing the contribution to the social, cultural and economic wellbeing of a region made by the full spectrum of festivals, and that the study of different types of festivals offers “its own individual characteristics and contexts” (Mair, 2019: 12), the focus of this research is artistic festivals.

Research design and methodology

In as much as it was possible within the short timeframe and current climate, this study adhered to the anthropological approach to the study of festivals proposed by Testa that uses three main methodological pillars: “critical comparison, intensive and in-depth ethnography, and a thorough study of historical sources” (2019: 6). As outlined in the introduction, the paper compares the use of digital technologies by two Irish arts festivals to deliver their programmes in 2020. The primary data was collected by the researcher using ethnographic methodologies, including participant observation and semi-structured interviews. Replicating the public’s encounter with these events, the participant observation was mostly restricted to online viewing of the digital output of the festivals. The historical perspective on these festivals, which provides a context for the dramatic programmatic changes that were required in 2020, was provided by the researchers embedded position within the Irish festival ecology, where he has worked for the last twenty years, supplemented by secondary research online and in the Arts Council of Ireland archive.¹¹

Maria Sassatelli has argued for the importance of paying “attention to the ‘situatedness’ of festivals as cultural artefacts and organisations, linked not only to a specific genre of the artworld, but to the social and spatial organisation - and therefore the related cultural politics - of the place that hosts them” (2015: 36). Similarly János Szabó’s analytic approach to festivals recognises cultural and community “embeddedness”, to reveal “the scope, depth and quality of a festival’s support from its community and the strength of its social networks” (2015: 46). This research takes a similar stance, proposing an analytic approach to festival making as a socially engaged collaborative creative endeavour, defined as a durational dialogical curatorial practice. For the makers of artistic festivals this practice involves initiating, maintaining and responding to a complex matrix of relationships with artists and production personnel, institutional and community stakeholders and diverse publics, while simultaneously constructing a festival programme of individual events that sit coherently together to form a unified whole.

This conceptual approach builds on ideas presented by Donald Getz et al. that understand a festival as a “networked structure for producing meaning” created by undertaking multiple overlapping

¹¹ The author was Artistic Director of Clonmel Junction Festival (2001-2015) and has been Festival Advisor to The Arts Council/An Chomhairle Ealaíon since 2016.

“meaning-based negotiations” with stakeholders (2019: 46). The durational dialogical curatorial practice proposed by this research, is also indebted to Grant Kester, a critical theorist working in the field of visual arts. Kester reframed contemporary collaborative and socially engaged art practices “as a process – a locus of discursive exchange and negotiation” so as to consider the art work not as an object but as a “generative process” that facilitates dialogue among diverse communities (2004: 12). Transposing this to the field of festival making, the public facing event becomes part of a longer ‘generative’ process of engagement undertaken by a festival organisation. Just as Kester looked beyond the art object when considering collaborative art works, this research argues that festival making as a creative practice includes the myriad exchanges and negotiations that take place during and beyond the time frame of the public facing festive moment. This approach is of particular relevance when considering the activities of festival organisations in 2020, during which the mounting of live events was dramatically curtailed and the festivals’ output migrated online. In these instances, as will be demonstrated in the discussion that follows, the digital offering represented the public facing moment that emerged from a complex weave of negotiations the festival organisations had with stakeholders during which new societal meanings emerged. Before beginning this analysis, the paper will present a short introduction to the Irish festival ecology, within which the two case study festivals are positioned.

The Irish festival ecology

Reflecting Ireland’s geographical and political isolation in the middle of the last century, the genesis of artistic festivals in Ireland lagged behind similar developments in continental Europe. The earliest dedicated arts festival to have been established in Ireland was the Wexford Opera Festival (est. 1951), followed soon after by Dublin Theatre Festival (est. 1957). However, it was not until the 1970s, when the concept of a multidisciplinary or combined-arts festival arrived in the country that there is evidence of arts festivals becoming a feature of the cultural life of Irish towns and cities (Quinn, 2005: 13). The funding figures presented in the annual reports of the Arts Council provide evidence of the exponential growth of festivals in Ireland over the last forty years. In 1977 the Arts Council funded twelve festivals (The Arts Council, 1978). By the late 1990s this number had swelled to seventy-six (The Arts Council, 2000). The increasing demand for festival funding and growing recognition of the importance of festivals in the arts ecology led the Arts Council to appoint of a dedicated Festival Officer in 2004 and establish a new festival funding scheme (The Arts Council, 2005).¹² Between 2004 and the winding up of this scheme in 2016, 1,860 grants were

¹² The Festival and Event Scheme, which offered funding of up to €30,000, ran from 2004 until it was superseded by the Festival Investment Scheme in 2017.

awarded.¹³ In 2018, over €6.5 million was distributed between 173 festival organisations (The Arts Council, 2019: xii).

With the exception of a few festivals that took place in January, February and the first two weeks of March, the Covid pandemic impacted on almost all of the festivals funded by the Arts Council in 2020. While a small number chose to cancel, most organisations, whether professionally or voluntarily run, chose to deliver some events over the period they would have been staged. The forms these alternative or re-imagined programmes took, varied considerably. The shape of the 2020 programmes delivered by each festival was determined by a multiplicity of factors, including organisational mission and resources, core audience demographics, artform focus and where in the cycle of the pandemic the event was due to happen.

For literature festivals, the pivot to digital broadcasting was relatively straightforward, as the format of talking heads favoured by these events was easily replicated using Zoom to connect the moderators with their guests, and platforms like Facebook and Youtube to broadcast the work. This was demonstrated by Cúirt International Literature Festival that was at the vanguard of the digital pivot by festivals in Ireland presenting their full planned programme online in late April. The switch to digital transmission was however, not so easy for festivals with other artform focuses. For example, Dublin Dance Festival, which was due to happen between May 19 – 31, was forced to cancel the planned live programme. Shifting their dates to May 29 - June 7 to allow additional time for the preparations, the organisation presented a re-imagined programme under the title DDF Digital Capsule. Delivered fully online, this event included some screen dance pieces, some dance documentaries, a number of commissioned essays about contemporary dance in Ireland, workshops and discussions delivered over Zoom.

The use of digital platforms by festivals was not confined to larger professionally run festivals like Cúirt and DDF. From early May, smaller, community run organisations had embraced the challenges of making the move to digital transmission. Some like Mountshannon Arts Festival and Cashel Arts Festival chose audio as an alternative mode of transmission, devising elements of their revised programme that could be broadcast in partnership with their local community radio stations. Other festivals like Baltimore Fiddle Fair and Trad Picnic used audio visual recordings disseminated through a variety of social media platforms. Many of these festivals have kept this video content online, providing the organisations and the participating artists with promotional material. For research, this body of work represents an extraordinary archive of Irish festival makers and their artistic collaborators creative responses to the Covid pandemic. These documents also

¹³ Regina O'Shea, Festival and Events Officer of the Arts Council, correspondence, 17/11/16.

provide evidence of the socially engaged collaborative nature of festival making, their connection to place and the importance of these organisations outside of the public facing events they are traditionally evaluated against.

While the creative response of any of these organisations to the Covid restrictions could have been selected for this study, it was decided to focus on Earagail Arts Festival (Earagail) and Dublin Fringe Festival (Fringe), two of the larger annual multidisciplinary (MDA) festivals.¹⁴ Factors influencing the choice of these festivals included the fact that they are both long established, of similar duration and of comparable organisational scale. While differing in their programmatic focus, both festivals are committed to presenting a range of artforms, thereby offering a perspective on the suitability of digital transmission for more than a single artform. That the two festivals occurred at different moments in the pandemic cycle provided the study with a further node of comparison.

Running over eighteen days beginning in early July, Earagail is one of the longer MDA festivals that take place annually in Ireland. It is also unique in that the work is not presented in one town or village but programmed to take place in locations throughout the county of Donegal (one of the bigger of Ireland's 26 counties). The festival, which has been running for 32 years, presents theatre, spoken word, music, circus and spectacle in a variety of venues including the public realm, and visual art exhibitions in a number of galleries. In addition to presenting the work of established local, national and international artists, Earagail has a commitment to nurturing local emerging artists and developing collaborative projects that bring artists into contact with other artists or communities of place or interest. While operating as a non-profit organisation, Earagail has strong ties with the Local Authority Arts Office, the Regional Cultural Centre and An Grianán Theatre,¹⁵ who all have representation on the Earagail board, and with whom the festival works as a strategic partner in the development and promotion of the arts in County Donegal. To enable Earagail to deliver a county wide festival the organisation has also built strategic partnerships with arts and community organisations throughout the region.

Fringe, which traditionally runs over the two middle weeks in September, celebrated its 25th anniversary in 2019. The festival originally ran in October, concurrent with the Dublin Theatre Festival (DTF), to provide a platform for independent theatre companies to present their work at a time when the larger festival was more concentrated on presenting International theatre. In the early

¹⁴ In 2019 Earagail Arts Festival received €170,000 in funding from the Arts Council. In the same year Dublin Fringe Festival received €396,000. Both awards were made under the Strategic Funding Programme.

¹⁵ The Regional Cultural Centre is an art centre focused on visual arts and music. An Grianán Theatre is a 383 seat theatre. Both venues are in Letterkenny, the principal town in County Donegal.

2000s Fringe moved to a September timeslot so that it did not have to compete with DTF for the limited theatre facilities available in Dublin, and to facilitate Irish and international artists presenting at Edinburgh Fringe Festival transferring directly to Dublin. Over the years Fringe has presented a good proportion of its programme in city centre theatres, however given the experimental nature of much of the festival's programme, a significant portion of work presented has been in non-theatre spaces and in the public realm. Unlike most fringe festivals, Fringe is fully curated, with the programme being comprised of a number of shows commissioned and developed in collaboration with the festival, alongside a much larger number of independently produced work that is selected from an open call. Like Earagail, the Fringe operation extends beyond the mounting of the annual festival. Since 2012 the organisation has been running Fringe Lab, a year-round facility providing studio space and professional development training to artists. Current Fringe Director Ruth McGowan explains that Fringe is:

...not just as a festival but as a year-round artist support organisation making major investment into the career development of Irish Artists, particularly emerging artists and artists with experimental practice, artists who work outside the traditional models of making.

(McGowan, 2020a)

From these brief outlines of the two case study organisations, the understanding of a festival as a “networked structure for producing meaning” proposed by Getz is revealed. In both cases the organisational operation is enmeshed in a network that includes established arts institutions, funding agencies like the Arts Council and Local Authority and the artistic community with which the festival has established ties. As will be demonstrated in the next section, the re-imagining and delivery of these two festivals within the dramatically changed societal environment of 2020, emerged from a generative process of dialogue and negotiation initiated by the festivals with their established networks. While this research would concur with Luonila and Kinnunen that the audience is also “a partner in the networked festival production” (2019: 1), the restrictions on public gatherings during 2020 has meant that the voice of the public has been less prevalent in the festival making process in 2020. The implications of this will be discussed in the concluding section of this paper.

Earagail Arts Festival

When the government restrictions were introduced in March, Earagail already had a number of events on sale and the graphic designer was busy preparing the brochure, which was due to be launched in April. Festival Director Paul Brown described the weeks that followed the government announcement as similar to working through the stages of grieving, as they dealt with the trauma

of having to shelve the programme they had “been working on for in some cases up to two years” (Brown, 2020a). First there was the “stage of denial” when they tried to believe it would still be possible to have a festival in July. This was followed by a period of depression as they mourned the loss of so many projects. However, this did not last long as “acceptance and hope from the challenge of repurposing came quickly at the start of April” (Brown, 2020b). The “repurposing” concept Brown devised was to commission “18 digital events”, short videos, to be presented “over the 18 days of [the] original dates of 9th to 26th July 2020” (Earagail Arts Festival, 2020d). This alternative EAF, which was called *Srutháin*,¹⁶ was announced on April 29th, demonstrating the extremely tight timeframe within which this process of denial, depression and acceptance, and the devising of the alternative plan took place.

Although not exclusively focused on the Donegal based artists, the majority of the commissions and co-productions created for *Srutháin* were by Donegal based artists that the festival had made a commitment to present in 2020. Of this decision Brown said “we wanted to make sure [these artists] were getting paid, but also commit to making sure that they were creating some work as well... to see what we could do together which would be meaningful to the artists and of a high quality”. Over a period of weeks, with everybody restricted largely to their homes, Brown engaged in conversations with these artists to discover what they wanted to do, and how best the festival could support them. Brown described these exchanges as being akin to “group therapy sessions” as they supported each other and tried to make sense of the uncharted territory they found themselves in (Brown, 2020a).¹⁷

As will also be evident in the case of *Fringe*, the creative contours of Earagail’s 2020 digital festival can be seen to have emerged from the director’s discussions with the organisation’s strategic partners. It should be noted that the creative voices at the centre of each of the 18 *Srutháin* videos were largely performing artists. The invitation from Earagail was for them to devise a piece of work to camera. This shift pushed both the artists and the festival organisation into “new and uncharted territory”(Earagail Arts Festival, 2020a).

The artists, representing different artforms including dance, music and spoken word, each chose to respond to the invitation differently. Some, like the music groups *The Henry Girls* and *Iarla Ó Li-onáird & Steve Cooney*, chose to perform a short concert to camera. Others music groups like *Fidil*

¹⁶ *Srutháin* translates as ‘small streams’.

¹⁷ During this period Brown’s conversations extended beyond the artists selected to be part of *Srutháin* to include the national and international artists that were due to perform at the 2020 festival. From these discussions a number of other outcomes emerged including “altered plans to commissioning and remote working collaborative projects, redesigned the work they were doing, committing to presenting the artists in 2020” (Brown, 2020b).

and Inishowen Gospel Choir worked remotely through platforms like Zoom, with the AV editor using an amalgam of different self-made MP4s to create a collage like outcome. Breandán de Gallaí, the Artistic Director of Donegal based contemporary dance company Ériu, responded to Brown's invitation by creating a documentary about Ériu, using archival film footage of the shows produced by the company since it was founded in 2010.

The Donegal landscape featured strongly in a number of the works, particularly the spoken word pieces that used dramatic shots of Donegal scenery while the writers recited their work.¹⁸ In a similar vein the Elma Orkestra & Ryan Vail concert was filmed at Lenan Head Fort, and included aerial footage of the coastal cliffs as a backdrop to the concert. In making the decision to focus on the Donegal based artists for Srutháin, Brown was responding to the organisation's stated commitment to support the careers of artists living in the region, which is central to its funding relationship with the Arts Council. This strategy also enabled Brown to create a body of work that presented a portrait of the richness of the cultural life of this region. In addition to providing the 2020 digitally delivered festival with a coherent curatorial theme, this also allowed the organisation to fulfil its commitment to Donegal Local Authority and Fáilte Ireland, two key strategic partners, that value the work Earagail does supporting tourism in the county.¹⁹

While some groups had the capacity to film and edit their own videos, most were reliant on Earagail to provide this expertise. For the festival this was new territory as the organisation had been heretofore mainly focused on presenting live arts events. Brown chose not to engage one company to do all of the video work, recognising that "there are people who are very technical videography wise and others who are more stylistic ... we picked particular people to do shows that their style or CV lent them to" (Brown, 2020a). Aside from the aesthetic considerations this had the additional benefit of spreading the expenditure across eight different Donegal based companies - another example of the importance of the festival organisation's interconnection with, and sensitivity to, the social and economic ecologies of the region.

While some of the artists referenced in their introductions the challenges the country was facing at the time of the recordings, and the importance of the festival's invitation to enable them to sustain their practice, only two of the groups chose to weave an interrogation of the impact of lockdown into the narrative of the video. One of these was Na Mooneys, a West Donegal traditional Irish

¹⁸ An example of this *Baird Nua-Aoiseacha: Le Sruth Lionta*, created by Colmcille & Eoghan Mac Giolla Bhríde that presented readings of Irish and Scots Gallic poetry by writers from the two traditions over pictorial images of a curragh rowing along the Donegal coast.

¹⁹ In respect of Earagail's networked connection to tourism in the region, it is worth noting that the Fáilte Ireland (the Irish tourism promotion agency) have been in discussion with the festival and Elma Orkestra & Ryan Vail with a view to using this piece in their global promotions (Brown, 2020a).

group spanning three generations of one family, who undertook to compose and record a new song. In their seventeen-minute video, in which the new tune was aired for the first time, the 7 members of the group told the story of the making of the tune, providing a window into these renowned artists creative process. The personal testimonies included an account of the impact Covid-19 was having on them personally and creatively. While Mairéad Ní Mhaonaigh admitted that she was unable to play or sing for the first month of lockdown, her sister Anne spoke of the “unique period of time we are living through” and the opportunity it gave her “to listen and practice and compose tunes”, something which she acknowledged she is normally not good at doing. She credited the festival’s invitation to make the video as being the “instigator” of the family’s creative burst, which continued after the song was finished resulting in several other tunes being composed that are also premiered on the video (Earagail Arts Festival, 2020c)

In a similar vein the Belfast circus troupe Tumble Circus, who have been annual visitors to Earagail for many years, created a video for Srutháin that provided a suitably slapstick glimpse of the life of circus artists during lockdown. Between filmed rehearsals in the back gardens of their Belfast homes and an abandoned warehouse, the artists enthused about their new found love of gardening, a pursuit that is usually not possible for performing artists that spend so much time travelling for their work. Reflecting the rhythm of the spring and early summer of 2020, the film ended as public health restrictions were easing, with the troupe of six performers cycling through near empty streets to a nursing home to perform outside for the residents (Earagail Arts Festival, 2020b).

Given the timeframe the Earagail team were working in, and the fact that the majority of the filming was done during the twelve weeks of lockdown that began on March 14th, Srutháin was a formidable achievement. Looking back on this period Brown spoke of “a really sharp learning curve” and the need for the team to “become accustomed to different processes” (Brown, 2020a). They also had to face up to certain limitations, for example, one production company wanted to stream the show they were filming live. This had to be abandoned when it was discovered that the organisation’s website was not configured to support live streaming – an issue that the organisation is looking to rectify in advance of 2021.

Reflecting on Srutháin, Brown spoke about it as “an interim stopgap”, moving the programme online meant “it was safer, we could commit to doing it, and say this is how it is going to happen”. However, he believed there was a general desire in the organisation and among the festival’s stakeholder community “to move back to the live situation”; a theme reflected in the heartfelt testi-

monies by Na Mooneys and evident in the joy the Tumble Circus performers displayed at having the opportunity to perform for the nursing home residents.²⁰

Looking to the future Brown said that that “there were positives in us learning new ways of working”. In particular he remarked that “if we ever get back to the situation where we can put live audiences into a venue, what we would aim to do is actually look at the idea of simultaneous broadcasting” (Brown, 2020a). However, unlike 2020 during which the programme was offered for free he believed that it would be necessary to introduce a paywall, as it was unsustainable to continue creating content without the prospect of a monetary return.

While acknowledging that it is operating in a different milieu than Earagail, with much of its core public being urban based young adults, Dublin Fringe Festival chose to charge for all their 2020 shows, regardless of whether they were experienced in a venue or at home. As the following section will reveal, this is but one of a number of differences in the curatorial and operational approaches of these two organisations revealed by this comparative analysis.

Dublin Fringe Festival

When the lockdown happened, Fringe was nearly five and a half months away, giving the organisation a full two months more than Earagail to prepare their 2020 edition. Comparing the accounts of the two organisations’ operational activities during this period revealed a similar process of grieving occurring in both. Like Brown, Fringe Director Ruth McGowan described her anguish at having to cancel “passion projects” the organisation had been planning, some of which “had been in the works for three or four years” (McGowan, 2020a).

Given the additional time available to Fringe, the process of letting go of the planned festival and reimagining an alternative was slower to unfold. This is evident from the fact that Earagail made a public announcement of their plans for Srutháin at the end of April, while it was not until June 5th that Fringe announced their 2020 programme.²¹ Aside from time frame differences, the unmaking of the planned festival and making of a new Covid-compliant festival by McGowan and her team, involved a similar leaning into the organisation’s established ‘networked structure’ through a process of consultation with stakeholders as was evident in the case of Earagail. However, because of

²⁰ In this regard it is worth noting that in addition to the 18 digital events presented by Earagail as part of Srutháin the festival also presented a pop up show by musician and theatre artist Little John Nee. This event was added to the programme at the eleventh hour when the government announced plans for easing restrictions on May 1st (Department of the Taoiseach, 2020).

²¹ The 2020 Fringe programme was given the moniker or the Pilot Light Edition.

differences in the operating models and core missions of the two festivals, the curatorial choices that emerged from this dialogical process were quite different.

Remembering back to what she called the “innocent days of March”, McGowan recalled her belief that “Fringe would be the party at the end, we thought society and the world would have returned to normal by the time September came around”. Consequently, during April the Fringe team continued to read through the 360 submissions they had received in response to their open call.²² However, with a growing awareness that the virus was going to “impact on all of our lives and society, for much longer than we had initially thought” the festival team also began scenario planning. During April, the Fringe team devised “five different versions of the festival, in terms of budget and programme, to see what might be possible” (Ibid.). However, when the Irish government released the roadmap to re-open the country in early May, McGowan acknowledged that:²³

At that point we knew that Fringe business as usual was no longer on the table. We knew that 80 shows in 36 venues, with shows sharing dressing rooms and sharing spaces, and audiences bustling in and out with an hour turnaround between shows... we knew at that point that that wouldn't be possible

Although it was clear that the usual format of Fringe would not be possible, McGowan believed that a festival could happen. This belief was based on certain core features of the festival including the fact that it is “set up to be the place for experimentation” with a “sense of discovery in its DNA” (Ibid.).

While McGowan was confident that the Fringe team could deliver, she was clear that this was but the first step. Before any decisions were made she needed to consult with the organisation’s stakeholders. First and foremost, she wanted to talk to members of the artistic community the organisation serves. This was done over the course of a week in a series of Zoom meetings at which McGowan sought feedback from a selection of artists whose opinions she valued as to if and how they should proceed.²⁴

²² The open-call for submissions went out in January 2020 and closed on March 10th. At this stage Fringe had 360 submissions. It was anticipated that they would select around 70 of these to present alongside 10 commissions, some of which had been in development for several years.

²³ The Irish government announced a three staged roadmap to reopening the country on May 1st (Department of the Taoiseach, 2020).

²⁴ Fringe “engaged independent members of the artistic community in this advisory process. The consultants were not artists slated for/ applying to be programmed in the festival” (Brown, 2020b).

The unequivocal response from the artists they contacted was, according to McGowan, that “people want to make, tell them what the parameters are and people will make” (Ibid.). Responding to this plea, the creative team at Fringe devised a three-strand programme, which included live shows in indoor and outdoor venues,²⁵ works to be experienced ‘at home’ that were transmitted via the internet, and works that were to be experienced ‘near home’ that used an audio download and props sent to the participant via the post.

The dialogical process that McGowan and her colleagues undertook was not confined to artists. Once plans for the Pilot Light Edition began to take shape they needed to be discussed with the organisation’s board. McGowan also had to bring the alternative plans to the funding agencies and corporate sponsors that had made their commitments to the organisation based on a very different programme. Discussions also took place with the theatre venues, health officials and police as the DFF team attempted to understand what would be required to present work to the public in a safe and controlled environment. McGowan said that due to multiple constraints, including time pressure, consultation with the public was not possible at that time. However, through their active social media the views of this important stakeholder group did have some input the process.

The Pilot Light Edition programme launched on August 5th had 23 shows. Some of this body of work came from the open call submissions that had been submitted in early March, which McGowan was confident could be delivered in their “fullest incarnation within the guidelines”. The remaining pieces were commissioned by Fringe from artists “who have sound art or digital art as part of their practice, or from artists who have formal innovation as a core part of their work. Over half of the work was to be presented live in a combination of recognised theatre spaces and alternative indoor and outdoor venues. To deliver this programme the box office and festival production teams had to put in place detailed health and safety guidelines for both staff and public, and scrupulously oversee their implementation. The capriciousness of the pandemic’s impact on festivals and events was apparent when the four outdoor events, which had been thought less vulnerable than the indoor work, had to be cancelled sixteen days after the programme was launched, due to revised public health parameters being announced that restricted outdoor gatherings to fifteen. While losing these shows was disappointing for the artists that had been working to prepare the pieces for several months, and the audiences that had been anticipating attending,²⁶ such an eventuality had not been unexpected. Indeed, in planning the festival, McGowan had been determined that it had “a spine of work that could happen even if we never got out of lockdown” (Ibid.).

²⁵ According to the government roadmap outdoor events could go ahead with a capacity of 150 people, indoor events were restricted to a capacity of 50. Social distancing was to be maintained throughout.

²⁶ A measure of the demand for live work the four outdoor shows, each scheduled for several performance, had all sold out by August 21st.

As was evident in the case of Earagail, the re-imagining of Fringe emerged from a dialogical process that took place over a period of time. In keeping with other collaborative artistic practices, the process of festival making is guided by the curatorial vision of the maker, who is in turn guided by the mission statement and core values of the festival they are entrusted to lead. In the case of Fringe, McGowan was very clear that while the 2020 public offering was going to be radically different to other years, “it still had to be recognisable as Fringe” (Ibid.). The “curatorial considerations” when making the Pilot Light Edition were:

We wanted the work to be artistically satisfying to the artists, we would only present pieces that could exist in their full gesture within the guidelines, and every piece of work had to have an element of a shared experience for the audience.

(McGowan, 2020b)

While the first of these values would apply to Fringe in any year, the other two were more Covid related. The second was of particular significance when selecting the live work, as it was in this context that the public health guidelines had the greatest impact. For the live work the shared experience for the audience is a given, albeit in these Covid times it was under unusual circumstances, masked and seated at two metre intervals. For the digital work this criterion set a particular challenge to the artists. The motivation behind this was the belief audiences “come to Fringe to have a unique experience but also quite an intimate experience”. This McGowan felt could not be achieved if the audience viewing a work at home could press play and walk away from the device and not be an active participant throughout (Ibid.).

As a consequence of this objective, the digital component of Fringe represented an important progression in the live arts understanding of how these technologies can be used. For example, in *Twenty Fifty*, the creators and performers Dan Colley and Fionnuala Gyax were in The New Theatre connected to an audience of about 50 people on Zoom. They were also joined in the Zoom room by a different guest ‘performer’ who had volunteered to participate in the show. During the course of the 60-minute performance the guest was asked questions about their likes and dislikes, their habits and dreams. On a number of occasions, the host of the event also asked for volunteers from the audience to answer questions. The input from the guests and the audience members ensured that the trajectory of the show was different for each performance.

Initiation by Mathew Bratko and Frank Sweeney, was likewise presented over Zoom. In this work the presenting company did not reveal themselves on screen, choosing instead to present the narrative as an audio piece. For the duration of the show, except when presented with visual interven-

tion by the makers, the audience of 25 were looking at each other in the tiled Zoom format. Over the course of the 60-minute performance, the audio recounted a person's unwitting journey into a macabre and threatening world, where they were seduced into becoming part of a shadowy cult. Instructed by an email sent in advance, each audience member had gathered beside them a set of props that included scissors, a raw egg, and a basin of water. As the audience followed the unnamed person on their journey, they were asked at intervals to undertake tasks similar to those being experienced by the protagonist. When the hero character was submerged in water, the public were invited to put their head face-down in the basin of water and hold it there; the scissors were used to replicate the cutting of a lock of hair during the initiation ceremony; the egg was cracked into a glass and eaten raw when the protagonist was forced to imbibe some slimy concoction.

The public's experience of these works, alone and at home, was very different to the collective experience an audience has in a venue. What these two forms do share is the simultaneous experiencing of an unrepeatable live communal event, which is missing when the digital offering is pre-recorded and available to watch at any time. In the case of *Fringe*, the decision to sell tickets to the digital performances added an additional layer of connectivity.

The digital component of the two shows that represented the 'near home' strand of the Pilot Light Edition, came in the form of an audio download that the person experiencing the work played when taking a walk near their home. In these works the communal connector was not the time that the work was experienced, as the pieces could be done at a time that suited the participant, but a thematic connection that was integral to the work. In the case of *A Rain Walk*, which invited the participant to listen to the soundtrack while taking a walk in the rain, it was the fact that everyone experiencing the show was doing it in the rain.²⁷ In the case of *1000 Miniature Meadows*, it was the ritual of planting wildflower seeds, received by post in advance of the show, while listening to the audio that provided the connection. Indeed, when these 'miniature meadows' germinate in 2021 the show participants will be reminded of the experience and their connection to the other 999 meadows that will be propagating around Ireland.²⁸

²⁷ *A Rain Walk* was created during lockdown by the artists Andy Field and Beckie Darlington working collaboratively with a group of children who met over zoom.

²⁸ On purchasing a ticket for *1000 Miniature Meadows* the person was sent a programme with a small envelope of Irish wildflower seeds.

Lessons learned

From this analysis of two MDA arts festivals of similar scale, that occurred at different moments in the annual calendar, this research provided evidence that location, time, resources and the artistic mission of the festival were, as they are in the making of a live festival, contributing factors in determining the contours of the digital outcomes. The in-depth interviews conducted with the directors of these two festivals, and detailed examination of their 2020 operations, provided important insights into how these two organisations re-imagined their programmes and retooled their operations to enable them to fulfil their mission to support artists in their practice and provide a platform for the public to engage with and participate in the creative outcomes proposed by the artists. The theoretical framework adopted by this research that understands festivals as durational, dialogical curatorial practices was evident in both, as the re-imagining and re-tooling processes by the festivals emerged from consultation and discourse with stakeholder communities.

For a variety of reasons, including the pressure of time and the fact that social gatherings were not possible, the dialogical process that determined the digital programming of the two festivals was done largely without public consultation. Exacerbating the disconnect from this key constituency was the fact that the gathering of feedback during the festival, through questionnaires and encounters between the festival team members and the public, was limited in 2020. Here again festival makers must turn to digital technologies for intelligence. Commentary on social media platforms and statistical data from these systems will, in 2020, take on added significance to inform festival makers of the likes and behavioural patterns of their audience. At the time of this research both Earagail and Fringe were in the process of examining their marketing data, which they both said would be a significant factor in shaping the contours of their plans for 2021 (McGowan, 2020a; Brown, 2020a).

Working as they were under such duress, it was not surprising that some of the digital experiments undertaken by Irish festival makers in 2020 ran into problems.²⁹ In meeting these challenges the sector amassed an enormous body of new knowledge. As plans for 2021 are being devised and policy formulated to guide future funding decisions, it is critical that the knowledge generated by these organisations is shared, so as to further strengthen this vital cultural sector's navigating of the uncertainty and ensure that policy decisions are informed by and responsive to the evolving practice of festival making.

²⁹ Carlow Arts Festival 's live cabaret broadcast on June 6th was delayed by 45 minutes due to technical difficulties.

REFERENCES

- Brown P. (2020a) Covid summer festival research: Earagail Arts Festival. In: Teevan D (ed).
- Brown P. (2020b) Points of clarification. In: Teevan D (ed).
- Earagail Arts Festival. (2020a) *Donegal's premier summer festival presents Srutháin*. Available at: <https://eaf.ie/sruthain/>.
- Earagail Arts Festival. (2020b) <https://eaf.ie/events/tumble-circus/>. Available at: <https://eaf.ie/events/tumble-circus/>.
- Earagail Arts Festival. (2020c) *Na Mooneys*. Available at: <https://eaf.ie/events/a-week-with-na-mooneys/>.
- Earagail Arts Festival. (2020d) The show will go on in Summer 2020! : Earagail Arts Festival.
- Getz D, Andersson TD, Armbrecht J, et al. (2019) The Value of Festivals. In: Mair J (ed) *The Routledge Handbook of Festivals*. London: Routledge.
- Kester G. (2004) *Conversation pieces : community and communication in modern art*, Berkeley: University of California Press.
- Larson M, Getz D and Pastras P. (2015) The Legitimacy Of Festivals And Their Stakeholders: Concepts And Propositions. *Event Management* 19: 159-174.
- Luonila M and Kinnunen M. (2019) Future of the arts festivals: Do the views of managers and attendees match? *International Journal of Event And Festival Management*.
- Mair J. (2019) Introduction. In: Mair J (ed) *The Routledge Handbook of Festivals*. London: Routledge.
- McGowan R. (2020a) Covid summer festival research: Dublin Fringe Festival. In: Teevan D (ed).
- McGowan R. (2020b) A few points of information/ clarification. In: Teevan D (ed).
- Newbold C. (2015) Introduction: impact, communities and places. In: Newbold C, Maughan C, Jordan J, et al. (eds) *Focus on festivals: contemporary European case studies and perspectives*. Oxford: Goodfellow Publishers Ltd.
- Newbold C and Jordan J. (2016) *Focus on Festivals: Contemporary case studies and perspectives*. Oxford: Goodfellow Publishers Ltd.
- Quinn B. (2005) Changing festival places: insights from Galway. *Social & Cultural Geography* 6: 237-252.
- Sassatelli M. (2015) Festival's Urbanity and the Public Sphere: reflections on European festivals. In: Newbold C, Maughan C, Jordan J, et al. (eds) *Focus on Festivals: contemporary European case studies and perspectives*. Oxford: Goodfellow Publishers Ltd.
- Testa A. (2019) Doing Research on Festivals: Cui Bono? *The Journal of Festival Studies* 1: 5-10.
- The Arts Council. (1978) *Annual Report 1977*, Dublin: The Arts Council/An Chomhairle Ealaíon.
- The Arts Council. (2000) *Annual Report 1999*, Dublin: The Arts Council/An Chomhairle Ealaíon.
- The Arts Council. (2005) *Annual Report 2004*, Dublin: The Arts Council/An Chomhairle Ealaíon.
- The Arts Council. (2019) *Annual Report 2018*, Dublin: The Arts Council/An Chomhairle Ealaíon.
- Wallace K. (2020) Change Makers Conference: The transformative power of festivals. Unpublished: The Arts Council/An Chomhairle Ealaíon.

Zoltan Szabó J. (2015) Festivals, Conformity and Socialisation. In: Newbold C, Maughan C, Jordan J, et al. (eds) *Focus on Festivals: contemporary European case studies and perspectives*. Oxford: Goodfellow Publishers Ltd.

Identity of independent cultural centres in Europe

MgA. David Mírek Ph.D.

Theatre faculty, Academy of performing arts in Prague, Czechia
david.mirek@damu.cz

ABSTRACT

Paper focuses on the cultural (art) centres which offer multi-genre programme in revived buildings (brownfields, industrial venues etc.). These centres are cultural phenomenon over 40 years. Digitisation is connected to globalisation for 25 years. Dozens of new ICC have also emerged over the last 25 years. These new ICC are home to creativity, ideas and social impacts. But question is. Why are they so similar across the Europe? Why is it difficult to determine the location of a cultural center according to its program? Why they are losing identity? Look back to history.

Keywords:

Strategy
Reviving venue
Independent cultural centres

Introduction

This paper works with dramaturgy and management in the first phase of reactivation of empty spaces. By this is meant buildings or areas that no longer serve their original purpose and provide an art space with an emphasis on musical forms. It could be described as independent cultural centres in revived (found) venues (ICCs).

We live in a time marked by the dispersion of values and ideas. The value ranking of our society is so diverse that many people found employment in fields that until a few years ago were only a leisure hobby of a few enthusiasts. In fields related to the environment, public benefit, creativity, culture, sustainable development etc. Among other things, thanks to this lifestyle, focused on creating value, we are witnessing the reactivation of old buildings for public benefit activities that would end earlier in managerial thinking - already in creating a business model or strategy. Thanks to the Covid-19 pandemic, the current problem of today is to resolve the question of what the cultural / art offer will look like. In my opinion, one journey could be spreading culture to non-traditional spaces, so it is important to know the context of this cultural sector.

The revitalization of empty buildings addresses social needs and naturally carries with it a number of positives, but also negatives. Reactivation of buildings is a phenomenon perceived both from a

- civic,
- public,
- educational,
- social
- and private position.

The intersection of these areas, the so-called penta-helix (Amrial, Muhamad, Adrian 2017), is crucial today in the development of this sector. However, artistic activities and the civic sector were at its beginning, as evidenced by Benjamin Fagner, who says: *"Before the abandoned industrial buildings and territories were discovered for business by developers and real estate agencies, they prepared space for a new job and presented the public with alternative artistic interventions, including theatrical activities. They were accompanied by a kind of modern colonization of inhabitants who are looking for places with low rents, and at the same time an empty space for creative self-realization."* (Schmelzová 2010, p. 136)

To revive and institutionalize empty places, it was and was necessary not only artistic thinking, but also managerial thinking, from the very beginning. And just the beginning, more precisely - the preparatory phase, is the main subject of my several years of research, which will be presented in this paper. It focuses mainly on the influence of the preparatory phase on the program content in

the operational phase. The programming in the European independent cultural centers (ICCs) that are being researched is very similar. This similarity stopped me and brought me to the questions to which I will look for answers in this work. When you see similarity, you should find the rules.

How is it possible that individual ICCs operating in revived buildings with such different history, legal form, size, geographical location and other legal order are so similar in their offer? Is the current ICC's model suitable for the development of contemporary art? Does it still make sense? Where is the line of success and failure in reviving of empty venue? And is there a universal model of how to revive properly? To understand the topic, it is important to divide the revivings by type and look at the history.

When I asked Sandy Fitzgerald (witness of the 70's era, artist and researcher) where he saw the difference between cultural centers in the 1970s and today's, he described it simply. *"Whereas in the beginning, art centers were initiated by artists who were connected by a certain philosophy and worldview, today they are initiated by middle-class managers and are connected only by a business model."* I am still looking for an answer to the question of whether this era of cultural managers contributes to the development of art.

Revitalization of empty space - time

By reviving an empty space is meant inhaling life into an already dead location. Fascinating for this topic is the level of creativity you need to use and the know-how to do everything legally and functionally. While years ago, there was a certain benevolence on the part of the authorities, today it is necessary to be thoroughly legally prepared. The cultural centers emerging between the 1960s and 1980s were oases of inspiring freedom. I mean new life in empty spaces with which society had no experience. Today, it is up to their enlightened managers to capture the bureaucracy and provide users with space in their organization for quality creation and presentation, whether we are talking about short-term (and temporary) use or an institution.

Principles and types of reviving venues:

- one time,
- temporary and
- long-term use of the empty space.

One-time recovery of the place

By one-time use of place, we mean recovery by one project. These can be site specific projects, festivals, residences, symposia or community events. All these types of revitalization are connected by the genius loci of the place and they usually work actively with the space. In the context of long-term or temporary use, they are important for familiarity with the space and usually precede long-term use.

Site-specific project and immersive theatre

When revitalizing a site, it is a frequent and important element in the implementation of site-specific projects.

"The artist grabs information and tries to understand the symbols so that he can understand the place, approach it and start a dialogue with it (as well as with its inhabitants). Site specific thus enters the public space with the intention that it wants to address a private, personal, intimate space. Even minimal interventions in space within this art are often very stimulating and activate the environment. The results of such projects are obvious (creation of residences, cultural centers, civic associations and activities, development of community projects, etc.).

The art of site-specific seeks to understand how a person works in a place and with a place that the inhabited and shared space means to him. It helps in various fields by trying to make an idea accessible - in sociological probes, as well as in urban planning, the solution of public space or in the issue of museum presentation. Its strength lies in the fact that it is not part of the establishment, and so it addresses such recipients of art as it needs." (Václavová, Žižka 2008, p. 35)

Next to site-specific projects, the offer of the so-called immersive theater has recently been expanding, which by its nature uses non-traditional spaces and, in my opinion, is a type of site-specific. Rarely immersive projects count with further use of space.

"Immersive theater is, in layman's terms, a theater that completely surrounds a person, a theater without a ramp between the auditorium and the stage, an alternative reality in which the spectator approaches the playing principles and rules and determines his dramaturgy of perception by moving around space, which must be large enough, so that, as in reality, parallel events can take place in it, but concentrated enough that a compact story can be told within it." (Kubák, Talacko 2015, p. 12)

Site specific projects have an irreplaceable role for long-term planning. The implementation of a site-specific project has much in common with the preparatory phase for long-term use.

Thanks to the variety of art projects, the experience with the one-use of space is an important result for the manager. We cannot forget residencies and festivals held in empty venues.

The benefits of one-use project are the following:

- Popularization of the place
- Financial simplicity
- Feedback from performers and audiences
- Program content test
- Arguments to public administration representatives, partners, etc. that it is possible

Temporary recovery of the venues

Temporality has a common knowledge of the end of activities with a one-time recovery, but their content differs. Temporary use combines the principles of one-time use and long-term. These are usually projects in buildings that are awaiting demolition or further planned use. In this phase they are used temporarily for a period of several months or years.

Many organizations have gone through a temporary phase in their development, in which they have verified their mission, developed their dramaturgy or experimented. Temporality complicates strategic planning and thus naturally long-term development. However, if the organization incorporates it into its long-term strategic plan, it can use it effectively in activities after leaving the temporary premises. Temporary activities include, for example, the Arena in Vienna, Trafačka in Prague, Cooltour in Ostrava, Tacheles in Berlin, Studio ALTA in Prague or creative cluster Provoz Hlubina in 2010–2014.

Long-term reactivation

After the section devoted to the short-term and temporary use of empty venues, there is a chapter that deals with long-term conversions of empty places. Organisations reviving these places divide their public benefit between culture, education, environmental program, community and increasingly to business development. This wide program focus is the common rule for these organizations and is also reflected in the operating hours of these organizations, which can program their activities throughout the week from morning to night – 24/7. The principle of their operation is unique not only in comparison with the private sector, but mainly with the public sector.

From the artist's point of view, these are spaces in which it is possible to rehearse, rent studios, look for co-production collaborations, learn and develop, realize and present one's artistic activities.

From a management perspective, it is important to name how to manage reviving process. Whether individually, by one organization that decides on the program and activities independently, or whether to reactivate the complex with more organizations (institutions). This corresponds to further division into ICCs and creative quarters (clusters).

Both of these types are constantly evolving, and new ones are emerging. However, the role of fresh organizations that give space to the latest artistic trends is weakening. Given their historical development, it is not surprising. E.g. when small-form theaters were established in the Czechoslovak Socialist Republic in the 1960s, they were fresh generational subjects based on new artistic trends, multidisciplinary and new generational poetics. Today, many of them run as public institutions, their role in the development of their fields is weakening and is much different then at the beginning. Today, their discovery role is represented by independent artistic entities, often operating in non-traditional spaces. I perceive similar trends in the ICCs, which have been existed in Europe for 50 years, and when new ones emerge, which are based on this concept, other areas of activities are added.

Independent cultural centres

Much has already been written about independent cultural centers, and in terms of their name, there is no uniform established definition in the European context. Every ten years, a new definition could be written, and it would sound different in each country. The words multi-genre, multidisciplinary, contemporary, creative, independent, cultural, international, lab, artistic, center, space and other variations of the above often appear in the descriptions of these organisations. However, the oldest and most used term is still the Independent Cultural Center (ICC), which I also use in this paper.

The beginnings of today's ICCs, which revived the vacancy, can be dated in the West to the 1960s. The first precondition for the establishment of the ICC was that, for many reasons, the role of traditional industries operating in cities was weakening. This was reflected in the emptying of industrial buildings and increasing number of brownfields. The second reason was societal changes, which were reflected in the way of life and the emergence of subcultures, and of course in art. Art began to move closer to people in non-traditional spaces. The artists themselves called these spaces "laboratories", in which they experimented on how to live, work and create. People began to associ-

ate in communities, populated empty spaces, the boundaries between genres disappeared, values changed, and the first unofficial / independent spaces were established.

At that time, the definition of the second reform of theatre was appeared, which Kazimierz Braun describes and confirms the multidisciplinary that was typical of the new art forms and has been preserved in these spaces to this day:

"The second reform was prepared by artists who went to the theater from other fields of art: poets, painters, musicians. In a practical sense, however, it began within the theater as a movement of professionals, young and old, frustrated by the theater, as they were taught and created by themselves, often for years. Many of them began to abandon learned and familiar aesthetic and organizational structures quite quickly, to free themselves from professionalism." (Braun 1993, p. 24)

The participants in the Second reform of theatre, from New York to Moscow, have a great influence on the development of the ICC, because they fulfilled a large part of the program of these centers and thus participated in the creation of their identity.

Braun also mentions the creation of one of the first conversions of a non-traditional space for theater: Performing Garage was founded in 1968, still works and is part of the Off-Off Broadway:

"One of the best-known well-executed solutions is the adaptation of Richard Schechner's old car repair shop in New York - Performing Garage. This partly unchanging and partly variable arrangement according to the needs of the production is based on the principles of close belonging of action and space. Each place inside the garage can be used either by actors or by the audience, and each can be living, loadbearing, functional. The preparation and determination of the space takes place during the rehearsal period, so it is the activity of the actors who "create" the space." (Braun 1993, p. 59)

The theaters of the Second reform of theatre were characterized by operating outside the theater halls, using non-traditional spaces and not being left behind with other artistic directions that date their new waves from the 1960s and 1970s.

"In the 1970s, punk extolled the virtues of DIY (do it yourself), spawning a whole generation of young people who took control of their own lives and believed in creative expressions and self-determination, as a means of challenging given beliefs and the way we think, act and create." (Fitzgerald 2019, p. 14)

Hand in hand with this, the ICCs became institutionalized and cooperated internationally. At this time, we perceive reviving activities most strongly - they have often become official thanks to the support of municipalities, which, in addition to Vienna's activities in 1970s, confirms Scottish industrial Glasgow, where the city has opened in 1988 the cultural center Tramway. From the former tram depot, it created a gallery, a theater, a community garden, a café and a place to work. For Glasgow it was one of the first steps on the road from a 19th century industrial city to the European Capital of Culture. Today, thanks to the city's approach to independent art, it is a cultural metropolis and a UNESCO City of Music. (© UNESCO | Cities of Music 2016)

As the European order collapsed and technologies evolved in the 1990s, culture and art in general developed across nations and borders. Likewise, activist activities, protests or demonstrations, which were considered confrontational and extreme, led to unpredictable transfers to public space and to issues of sustainability, collective life and resource use. Many of the results of these "revolutions" have become mainstream today and in many ways have become everyday experiences: recycling, alternative medicine, urban gardening, graffiti, street art, hip hop, interculturalism, veganism, street festivals, ecological sustainability, etc. These values originated in the original ICCs and the newly emerging cultural establishments - and everyday life - cannot be imagined without these elements.

From squat to institution

The most complex task in the strategic development of independent arts organizations is institutionalization, which usually occurs several years after their establishment. The main emphasis is focused on non-governmental non-profit organizations (NGOs), although there will also be examples of cultural centers, which were established by territorial-administrative unit. The most important part of conversions is the individuality behind which the organization stands. ICCs in non-traditional spaces have a history of more than fifty years. The ambition of this work is to describe the origin and functioning of the ICC since the 1960s from the manager's point of view, and then to reflect this view in the main trends of the newly emerging ICCs. Therefore, squatting must begin.

In parallel with the establishment of the ICC in the 1960s and 1970s, a phenomenon called squatting developed in the USA and Western Europe. Jiří Weberschinke also sees in it common values with the ICC, which arose thanks to this phenomenon:

"Squatting is defined primarily as the illegal but conscious occupation of empty, unused and abandoned buildings for which a new form of use has been found, primarily as alternative cultural spac-

es - concert and theater halls, galleries and places for free artistic creation." (Weberschinke 2003, p. 47)

It is therefore not surprising that many of today's ICCs went through a similar process at the beginning of their activities as in squatting - illegal settlement of the area. Some centers even started as squats. If we delete the word "illegal" from Weberschinke's definition, it is enough for us to define the values of the ICCs.

The common denominator in the creation of an ICC is idea / philosophy. All decisions are subject to it - in the beginning it is the basic decision-making aspect. For new organizations, which are based on experimentation, discovery and originality, it is not possible to plan long-term goals in the beginning. This step, called institutionalization, comes only after naming the basic visions and missions of the organization and verifying that they work. One major complication for artistic organizations is institutionalization, which is bureaucracy. Organizations should not be afraid to develop their portfolio of activities, but everything is based on the right decision when to start with these processes.

Despite the fact that society (wrongly) attributed anarchist tendencies to squats, they had an organizational structure and rules to which the newly emerging ICC returned. We can see it in organizational structure or pricing. All of these are today emerged in emerged topic named commonism. The general awareness of squats in Eastern Europe was spoiled by the 1990s, when some initiatives took over buildings aggressively and without social / civic support. Only a third of squats in the Czech Republic had a cultural and social overlap (e.g. Zlatá loď, Ladronka, Milada, Dobročinný spolek Medáků), but this was not enough to change the image of these initiatives, which is why squatting has received so little space in Czech history.

In Western Europe, the situation was different in the 1960s and 1970s. The story of Christiania - largest squat (September 24, 1971) in Copenhagen - began as a social experiment. In the first year, 500 people moved into the displaced barracks spontaneously (bottom-up). The squat had the broad support of the population. E.g. there were thirty thousand people to support it on one demonstration. Story of Christiania fit into the societal problem of housing, and squats offered one of the possible alternatives in which the above-mentioned values meet. This created a cultural and social center without an umbrella organization. Christiania has now about 1,000 inhabitants and parliament has approved its privileged position. (Weberschinke 2003)

Squatting brought with it another value, which is community life. This property is also common with the ICC - people with the same opinion want to spend time together and at that time also lived together. In squats we can find many other elements of today's ICC: self-sufficiency, independence, DIY, etc.

However, squatting is history today. Now the building has to be revived in a different way.

A key term for any organization with a long-term vision is sustainability, which can have different meanings for many people. For the ICCs, this is about programming, community and financial sustainability. All these three areas are interconnected and must be in harmony. I can't go down with the quality level of the program to match financial loss, and I can't make community activities when I don't have money for them. Any deviation in these areas leads the organization to problems from a long-term point of view.

From the point of view of business management, ICCs are only small and medium-sized enterprises (SMEs). E.g. The largest Czech cultural institution, the National Theater in Prague (ND), had 1,318 employees in 2018, but in terms of its revenues of CZK 1.256 billion / EUR 46,5 million (© Národní divadlo 2019), it is among the medium-sized enterprises according to EU regulations. (EU 2015).

There is much more literature on SME management, and we can be inspired by it for the ICC area as well. Novotný and Suchánek see in SMEs the main disadvantages:

- *“Limited employment opportunities for experts in administration and management activities,*
- *higher work intensity and less favorable working conditions,*
- *limited possibilities to obtain benefits from the scope of production,*
- *limited resources for promotion and advertising.* ” (Novotný, Suchánek 2004)

Former Prime Minister of the Czech Republic Mirek Topolánek perceives similar problems for SMEs as for the NCC: *“[...] the main problems of the European market are mainly excessive regulation, administrative, bureaucratic and legislative obstacles, especially for small and medium-sized enterprises.”* (Průša, Ošťádal, Topolánek 2013, p. 8)

This paper will use terms from the field of management such as business model, strategic planning and other theories that are necessarily related to the management of the organization. However, artistic organizations are based on creativity and it would be naive to think that anything can be

copied. Location, cultural traditions, history, environment, cultural policies, legislation and demography are specific and unique to each artistic organization. Based on his experience, Paul Bogen described the main features of a successful ICC:

- *It knows its purpose, why and for whom it exists and what it believes in*
- *It strives to be artistically outstanding, producing and presenting work of high quality*
- *It knows where it is going, why and how it will get there*
- *It has the right people who share the same values, who are skilled and self-motivated • It loves audiences!*
- *It is not just creative in art, but in everything it does*
- *It has a diverse revenue model and is not overly funding-dependent*
- *It has strong management & financial skills, tools, resources & knowledge*
- *It embraces and knows how to take, assess and manage risk*
- *It invests in itself, its art, artists, audiences, users, its own people and its future*
- *It embraces change, learning, partnership and collaboration*
- *It knows how to communicate and especially how to listen*
- *It is dynamic, challenging, energetic, exciting and most importantly, FUN!*
- *It has more income than costs! (Bogen 2019, p. 109)*

From the management point of view, history of reviving activities can be divided into three development phases:

1. Pioneer

The pioneering phase is the activities of the first revivals in the areas of their origin. In Western Europe, I mean the activities of the 1960s and 1970s, when the development of today's ICCs began in a revitalized area. After the fall of the Iron Curtain, these pioneering activities moved to the rest of Europe, but built on the experience of the West.

2. Expansion

The Expansion phase of the development of this area comes ten years later, when these activities begin to profile and become more widely known. Their program is developing, cooperation between them is being established, the first international networks are being set up and they are trying to institutionalize. Institutions are trying to get involved in the system of cultural offerings and are looking for their place in the "market".

3. Institutional

The institutional phase does not mean the phase of individual subjects, but the whole area of the ICC. Based on experience, professional institutions are created, which are inspired by the legacy of the pioneering and development phase, join existing networks and offer a new perspective on the management of the ICC. One of the features of this phase is the creation of private or public institutions that offer a similar program as the ICC.

Finding a suitable place

At the beginning of each reactivation there are unmet needs. This may be the lack of suitable space for rehearsals or the lack of space for the realization and following presentation of a project. When these needs can be named, the phase of finding a suitable place comes. Today, from a long-term perspective, it is not possible to settle the premises illegally, even if the best public benefit is behind you.

At the beginning of each venue reviving, it is necessary to settle the property relations with the building. There is no point in planning for the long term if the revived building is not owned by the organization or its long-term lease (5 years and more) is not guaranteed under precisely defined conditions. Many ICCs, which have been already disappeared, have paid for different expectations with the building owner, rent increases or operating restrictions.

For NGOs using revitalized premises, financial stability is fragile and influenced by many factors. However, all activities depend on space, which should be the most stable variable during the organization's activities, except for temporary use.

Strategy

The revitalization of the empty venue consists of three strategic phases, which differ in the content of the activities. These phases are based on the theory of project management, because the revitalization of space is a project whose goal is to reactivate the building. This structure is used for short-term and long-term use:

1. Preparatory

In the preparatory phase, the management focuses on the description of its activities - it defines its activities, program content, analyzes the environment, creates an organizational structure and

possible uses. This phase ends when the ideological intention is clear and there is a strategic plan or project definition. For temporary projects, it is the phase of finding space.

2. Implementation

The implementation phase begins with the signing of a contract, on the basis of which the operator will receive the keys to the building. The strategic plan is based on how long the organization has the keys available. In this phase, short-term and long-term projects prepare the space for the successful course of their activities (cleaning, obtaining permits, equipment, reconstruction, etc.) and communicate their mission to the public. This phase ends with the entry of the first recipient / visitor of the program.

3. Operational

The last phase is already individual and in the case of artistic reviving varied. In the operational phase, all program activities and daily operation of long-term reactivation generally start. For short-term activities such as site specific, festivals or immersive theater, the operational phase begins on the day organization sells tickets, for long-term openings to the public.

Many years ago, Peter F. Drucker did not want to use the term strategy in managing NGOs because it sounded too military to him (Drucker 1994). However, this term has taken hold and strategic planning is a separate chapter in the management of arts organizations, especially in the long run. During the managing the organization, the creation or change of a strategic plan comes several times, but the most important and creative part comes at the beginning.

Creating a strategy for empty venues does not differ from the strategy of traditional artistic spaces. It only contains other input data. The only difference is that it is necessary to initially incorporate short-term activities into long-term visions in the strategy.

Strategic planning is a basic pillar for artistic organizations, in which the mission of the organization is named, the internal and external environment is analyzed, and the goals and the path to their fulfillment are set.

William J. Byrnes creates the structure of the preparatory phase based on the answers to the basic questions:

1. *Why?*
2. *What?*
3. *When?*

4. *Where?*
5. *Who?*
6. *How?*” (Byrnes 2014, p. 148)

The majority of NGOs operating in the field of Culture and Creative Industries (CCI) has an insufficient organizational structure and financial background. Maybe that's why we don't encounter strategic planning with them. In other words, we would describe the reasons for the fact that in an inadequately financially rewarding sector, where it is difficult to find employees, let alone volunteers, it is difficult to plan for a longer perspective than a year or two.

All projects of independent culture are usually led by NGOs and we see a problem with their funding throughout Europe. The fact that organizations are at the beginning and without history does not improve their position, so it is surprising that artists underestimate strategic planning. Martin Kaiser realizes that “[...] *many artists fear that planning literally sets them apart, and sometimes even feel that doing so will limit their artistic prerogatives.*” (Kaiser 2009, p. 10) In the case of artists, I understand this emotion, but in the case of a manager this is out of place.

In addition to this fact, there are a few enlightened projects that invest time and money in strategic planning, even though they are at the beginning of financial priorities elsewhere. These are organizations that have been operating for many years. The goal of the newly emerging organizations should be professionalization / institutionalization, in which strategic documents are created on the basis of experience from the preparatory phase.

Each organization's strategic plan must begin by naming its mission. Sometimes he names one, sometimes ten. For multicultural and multidisciplinary activities, it is clear that the organization lists more. The number is not important, their exact naming is essential.

At conferences, trainings or self-development lectures, we often hear *“Think outside the box”*, which is intended to inspire you to think creatively, unconventionally and be original in all areas of your life. This principle is also used by Chris Bilton, who contrasts this thinking with the conventional one (Bilton 2007, p. 93). But you can't agree with that, you can't stand outside the box.

“If you have some experience with creative work, you probably know that inspiration, creativity and innovation don't come out of the blue. They are based on previous knowledge. They happen by interrelation and recombination of pre-existent ideas. Innovation occurs when you take things to the

extreme. And therefore, it flourishes at the edges of the box, not outside of it. Outside of the box there is absolutely nothing!” (Rodríguez 2019, p. 144)

Therefore, even when writing any strategic document, be in the box – learn how to create it and what are its possibilities. Only then can you choose the most suitable solution.

Business model

The strategic plan is well thought out business model. Naming this process in the case of NGOs can be misleading, thanks to its use in the commercial sphere.

„We have found that everyone in the arts and cultural sector is struggling with talk about ‘value’. It is no good trying to relate all the value of the arts and culture to monetary valuations, and equally unhelpful to try to justify the arts as some kind of special case, different from all other spending priorities and subject to unique criteria.” (Leicester, Sharpe 2010, p. 11)

The business model elaborates on the ways in which the organization receives income. For a long time, it was associated only with doing business in traditional areas, but since 2006, when business models suitable for cultural organizations were first described (I would recommend the paper of Falk, Sheppard 2006), their use has expanded.

In the field of urban transport, we are witnessing a unique business model at Uber or in the hospitality business at Airbnb and much more we will find thanks to Covid-19. When we focus on the topic of sustainability and strategic planning for artistic subjects, we also witness the development of the following models:

Business model variant	Example activities and assets	Underlying business model	My comments
Performer model	Activities include creating a show or performing in a show. Assets include creative and production expertise. Revenues might come from ticket sales or artist fees.	A solutions model in which creator and audience are present during the performance.	Revenue from the sale of tickets or artistic fees.
Product model	Activities include writing music or	A product model in	Revenue can come

	creating a physical artwork. Assets include creative and production expertise. Revenues might be from artist fees, licensing intellectual property or sales.	which a creator generates an artwork but is not directly involved in the audience experience.	from fees, intellectual property licenses, or sales.
Comissioner model	Activities include commissioning a show, cultural programming, connecting with audiences. Assets include expertise, relationships and data. The commissioner typically pays a fee and receives income from funders and/or ticket sales.	A match-making model – the cultural organisation is a mediator putting on a programme/ show by creators and engages/ finds audiences and other partners.	The promoter usually pays the fees. Revenues from fundraising and / or ticket sales.
Landlord model	Activities include renting out studio, office or co-working space. Assets include access to a venue and expertise in facilities management. Revenues come from rental income and/or non-financial income.	A solutions model in which venue and tenants and other users of the space are involved.	Rental income or non - financial income.
Hub model [ICC model]	This involves running a venue, platform or festival with multiple intersecting activities. Assets include expertise in cultural programming, audience development, staff expertise and data. The hub receives income from funders and/or ticket sales but also provides access to others without payment.	A multi-sided model which convenes more than two participants in generating value, although not all of them pay.	Income from donors and / or ticket sales. But it provides also access to others without payment.

Service model	Activities include delivering an event for a customer; running workshops or courses; running a café or bar; providing services to tenants. Assets include expertise in teaching, training or providing catering or bar services. Revenues include income from delivering services.	A solutions model – provider and customer are present during the service.	Revenue from the provision of services.
---------------	--	---	---

TABLE 1: (Baden-Fuller, Giudici, Haefliger, Morgan 2017) + my comments

Creative districts (clusters)

The creative districts differ from the ICCs in its organizational structure. The creative district is another developmental stage of the ICC strategy. There are several creative institutions side by side. Marcel Kraus creative districts as follows:

- „Mono-culture industries (vertical mode) - a district focused on TV / film & music post-production and studios, new media, textiles, ceramics, etc.
- Plural cultural industries (horizontal mode) - A district focused on coworking spaces, visual arts, architecture and design, multimedia, crafts / designers, theatrical arts, art centers, etc.
- Culture production - consumption - a district focused on studios with sales areas, art markets, cultural events, etc.
- Cultural consumption - retail district (fashion, computers / electronics), street markets (antiques, crafts, food), arts and entertainment facilities and neighborhoods (eg museum islands, theater districts, 'red light districts'), neighborhoods restaurants / bars / clubs, etc. " (Koleček 2017, p. 9)

From these definitions, it is clear that under the creative district, different theorists imagine different things. For me, creative districts mean a set of buildings in which creative institutions are located - so they correspond to the definition of a cluster. Koleček offers good definition of creative clusters.

"A creative cluster is a geographical concentration (often of a regional nature) of connected individuals, companies / startups, organizations and institutions involved in the arts, cultural and crea-

tive industries, new media, design, ICT, education and other cultural activities.” (Koleček 2017, p. 10)

An example of a functioning cluster can be seen today as the Prague Creative Center and the Scout Institute in the town halls on the Old Town Square or MuseumQuartier in Vienna. I have always perceived creative neighborhoods and clusters as a logical development in the development of CCI and another step in the development of ICC. From an organizational point of view, however, it is demanding and must result from the natural need of the place.

Experience shows that creative districts can be created with both a bottom-up and a top-down approach. While in the rest of Europe we see conceptual support for ICC and integration into the system of cultural policy, in Czechia it is still an undefined phrase. In 2012, I was convinced that the Czechia would join the trend of cluster initiatives in the field of CCI and their needs would appear in strategic documents. I still think there is still time, but it is getting shorter. I defend this by saying that while the ICC trend could not - given the historical context – be captured in Czechia, the trend of creative districts was able to join this by cluster activities in Pilsen, Brno, Zlín and Ostrava.

Another important fact is that a functional creative cluster cannot be imagined without cooperation with the public sector. At the ICCs, independence is based on cooperation with the public sector, e.g. in the area of grants, provision of venue and project cooperation. Many ICCs have their principle of cooperation based on the penta-helix principle. Thanks to expanding trend of penta-helix, it is clear that public sector is the most important partner in the beginning of creative district. This is also confirmed by the Czech experience, which knows the hints of cluster initiatives in the field of CCI, but they are always initiated by a top-down approach.

- Bottom-up districts (clusters) – Kulturbrauerei Berlin, Spinnerei Leipzig, Provoz Hlubina
- Top-down klastry – Prague creative center, Černá louka, Zlín Creative Cluster, Crative center Brno, MuseumQuartier Vienna.

ICC	Creative district (cluster)
One institution	More institutions
One building	More buildings, area, district
Focus on art	Focus on CCI
Non profit	Non profit + business

TABLE 2: DIFFERENCES BETWEEN ICC AND CREATIVE DISTRICTS

Conclusion

During this research, I came across increasing numbers of new reactivations and resuscitation in places where this was not expected - in smaller cities and in Eastern and Southern Europe, where other new approaches are emerging based on a different historical context. And there are the rules of reviving buildings for cultural activities:

- A strong open vision is needed from the beginning for a long-term recovery,
- the preparatory phase is essential for the development of the ICC,
- it is not possible to revive without a community,
- finances are not the most important thing at the beginning,
- it is necessary to have well-established property relations to the building, in the best case to own it,
- the organizational structure is horizontal in the preparatory phase, but with a strong leader,
- contemporary art has less and less space in the NKC,
- due to globalization, institutionalization and networking, the NCC loses its local identity,
- spaces in smaller cities are being revived,
- NGOs in empty spaces participate in strategic documents of cities.

The topic of reviving is now moving, as usual, to other areas and is no longer as specific as in the 1970s in Western Europe or in the 1990s in the Eastern Europe country. Objects are also coming to life in the mainstream, and we will discover contemporary art elsewhere in the coming years than at the ICC. Trend is clear, emerging ICC in small cities. I would compare it to the ECOC and its trend to choose smaller and smaller cities. There is much more networks including both top-down (Refill) and bottom-up institutions (TEH, CNLII, Anténa,...).

It will be interesting to observe cultural activities in refugee centers or in countries where refugees already make up a significant part of the population. I asked Sandy Fitzgerald what today's ICCs had in common. I can still see in front of my eyes how he points to the entertaining participants of the TEH conference in the backyard of Zentralwerk and answers the rhetorical question: *"Where is the diversity, multiculturalism and insecurity of creative bohemians? There's only a white middle class everywhere."* I believe this awareness helps the field of reviving venues dispose of the words like gentrification, business, manager, show-case etc. End help to focus on the identity from the beginning.

REFERENCES

- © NÁRODNÍ DIVADLO, 2019. *Výroční zpráva 2018* [online]. 2019. [Accessed 3 August 2019]. Available from: <https://www.narodni-divadlo.cz/uploads/assets/nd-vz2018-12.pdf>
- © UNESCO | CITIES OF MUSIC, 2016. Glasgow. *UNESCO Cities of Music* [online]. 4 July 2016. [Accessed 8 July 2019]. Available from: <https://citiesofmusic.net/city/glasgow/>
Glasgow is a vibrant city with a legendary music scene that stretches across the whole spectrum from contemporary and classical, to Celtic and Country. Its venues are equally varied and the city hosts...
- BADEN-FULLER, C., GIUDICI, A., HAEFLIGER, S. and MORGAN, M., 2017. Business Models and Value. *Academy of Management Proceedings* [online]. 2017. Vol. 2017. [Accessed 29 August 2019]. DOI 10.5465/AMBPP.2017.90. Available from: <http://openaccess.city.ac.uk/id/eprint/18177/>
- BILTON, Chris, 2007. *Management and creativity from creative industries to creative management*. Malden: Blackwell. ISBN 978-1-4051-1996-2.
- BOGEN, Paul, 2019. *Abracadabra! In: Models to manifestos*. Olivearte Cultural Agency. ISBN 978-930897-42-4.
- BRAUN, Kazimierz, 1993. *Druhá divadelní reforma?* 1. vyd. Praha: Divadelní ústav. Světové divadlo. ISBN 978-80-7008-037-X.
- BYRNES, William, 2014. *Management and the Arts*. 5 edition. New York: Routledge. ISBN 978-0-415-66329-8.
- DRUCKER, Peter Ferdinand, 1994. *Řízení neziskových organizací: praxe a principy*. Vyd. 1. Praha: Management Press. ISBN 978-80-85603-38-5.
- EVROPSKÁ UNIE, 2015. *Uživatelská příručka k definici malých a středních podniků*. Lucemburk: Úřad pro publikace Evropské unie. ISBN 978-92-79-45310-6.
- FALK, John H. and SHEPPARD, Beverly, 2006. *Thriving in the knowledge age: new business models for museums and other cultural institutions*. Lanham, MD: Altamira Press. ISBN 978-0-7591-0757-1.
- FITZGERALD, Sandy (ed.), 2019. *Models to Manifestos*. Olivearte Cultural Agency. ISBN 978-930897-42-4.
- KAISER, Michael M., 2009. *Strategické plánování v umění: praktický průvodce*. 1. vyd. Praha: Institut umění - Divadelní ústav v Praze. ISBN 978-80-7008-236-2.
7.075 |2 MRF
- KOLEČEK, Michal (ed.), 2017. *Čítanka kreativních průmyslů*. Vydání první. V Ústí nad Labem: Fakulta umění a designu Univerzity Jana Evangelisty Purkyně. Projekty. ISBN 978-80-7561-085-0.
338.4:316.74 |2 MRF
- KUBÁK, Ivo Kristián and TALACKO, Valerie, 2015. *Imerzivní divadlo a média =: Immersive theatre and media: Golem: Meyerink, Štvanice, Cube*. Vydání první. V Praze: Pražská scéna ve spolupráci s Tygr v tísni, z.s., a s Výzkumným pracovištěm katedry alternativního a loutkového divadla Divadelní fakulty AMU. Panorama českého alternativního divadla, sv. 26. ISBN 978-80-86102-94-8.

LEICESTER, G and SHARPE, B, 2010. *Producing the future: understanding Watershed`s role in ecosystems of cultural innovation*. Bristol: Watershed.

NOVOTNÝ, Jiří and SUCHÁNEK, Petr, 2004. *Nauka o podniku I*. Brno: MU ESF. ISBN 80-210-3333-9.

PRŮŠA, Jan, OŠŤÁDAL, Břetislav and TOPOLÁNEK, Mirek, 2013. Úloha malých a středních podniků v evropských ekonomikách. . 2013. P. 22.

RODRÍGUEZ, José, 2019. From Money to Value - 10 Ways Cultural Organisations are Innovating Nowadays. In: *Models to manifestos*. Olivearte Cultural Agency. p. 197. ISBN 978-930897-42-4.

SCHMELZOVÁ, Radoslava (ed.), 2010. *Divadlo v netradičním prostoru, performance a site specific: současné tendence*. 1. vyd. Praha: Akademie múzických umění v Praze. ISBN 978-80-7331-184-1.
orgh

VÁCLAVOVÁ, Denisa and ŽIŽKA, Tomáš, 2008. *Site specific*. Vyd. 1. Praha: Pražská scéna. Panorama českého alternativního divadla, sv. 10. ISBN 978-80-86102-44-3.
792.054-028.82 |2 MRF

WEBERSCHINKE, Jiří, 2003. Squat a divadlo. In: *Orghast 2004 Almanach příští vlny divadla*. Praha: Pražská scéna. ISBN 80-86102-39-4.

ZIMOVÁ, Zuzana, 2007. *ufaFabrik a Tacheles*. bakalářská práce. Praha: Univerzita Karlova.

New Learning Design Models in the Age of Crises: Student Theatre Festival as a Digital Teaching Method

Jovana Karaulić

Faculty of Dramatic Arts, Serbia

jovanakaraulic@gmail.com

Jelena Knežević

Faculty of Dramatic Arts, Serbia

jelena.knezevic@yahoo.com

ABSTRACT

The paper explores new learning design models in educational practices and policies, through a hybrid educational concept in the light of the “superconnection” phenomenon, thus analyzing potential ways of implementing the horizontal academic networking model as a blended e-learning platform. This model proposes creating a digital network between academies and cultural management departments, collaborating through lectures, guest lecturers, masterclasses, panel discussions in a digital environment, with the aim of creating online communities of students in the cultural field. Using the format transformation of FIST (Festival of International Student Theatre) as a case study – a festival organized by students of the FDA in Belgrade as part of their university studies curriculum, transformed into an online digital edition a few days before the pandemic had officially been declared and (self)isolation measures had been issued in Serbia – the research will explore prospects of digital networking for academies, and creating new, interconnected communities of future professionals in the cultural sphere.

Keywords:

digital teaching methods, networking, collaborative education, activity based learning,

Introduction

At the moment when this paper is being written, it is not entirely clear how the events will unfold in the foreseeable future, and, consequently, the global time of crisis urges us to examine the possible consequences, challenges and future opportunities of this socially complex point in time. To the current context of a crisis we naturally also add the concept of the Fourth Industrial Revolution, as a significant part of the current social, political, culture, education processes.

When we come to the field of education, the previous period has largely demonstrated the need for new models of education linked to questions and conclusions presented in The Digital Education Action Plan EU 2020, which presents a coherent narrative on the role of education and training in the digital age and takes an action-oriented approach. In this European Commission Document with the subtitle of “Resetting education and training for the digital age” the vision of digital education for the period of 2021-2027 was presented, drawing from the experiences of COVID/19 crisis where “technology is being used at a scale never seen before in education and training”. As it is marked in the document the crisis demonstrated that robust digital capacity and digital competences are essential for maintaining education continuity and social interaction. There is a consistent and urgent need for teaching eco-system to prepare for a future-proof education, and invest in the skills that will shape it – and make education and training adequate for the digital environment. The research demonstrated that almost 60% of the respondents had not used distance and online learning before the crisis; 95% consider that the COVID-19 crisis marks a point of no return for how technology is used in education and training; respondents say that online learning resources and content need to be more relevant, interactive and easy to use; over 60% felt that they had improved their digital skills during the crisis, and more than 50% of respondents want to do more³⁰.

Strategic goals of policies in the field of education are oriented towards understanding and development of quality and inclusive educational models by supporting cooperation, exchange of a good practice, networks, collaborative research frameworks. Thus, one of the main strategic sections in the Action Plan is founded on strengthening cooperation and exchange in digital education at EU level where education policies have a more active role in identifying, sharing and scaling up good practice, supporting education sector with tools, frameworks, guidance, technical expertise and research fostering collaboration and new models for exchange of digital learning content.

In this paper, we will examine possibilities of activity based learning practices, through integration of digital technologies into educational practices and policies, through a hybrid educational concept

³⁰ https://ec.europa.eu/education/education-in-the-eu/digital-education-action-plan_en

in the light of the “superconnection” phenomenon. Also, the paper will analyse potential modes of implementing the horizontal academic networking model as a blended learning platform. This model includes creating a digital network between academies and cultural management departments, collaborating through lectures, guest lecturers, masterclasses, panel discussions in a digital environment, with the aim of creating online communities of students in the cultural field. The research aims to contribute to the understanding of new hybrid learning models which combine traditional practices with the concept of horizontal digital networking and collaborations between institutions, as well as creating student oriented communities in digital environment. In the context of policies mentioned the Action plan established priorities towards strengthening cooperation and exchange in digital education at EU level, in response to the lessons learned from the Covid 19 crisis and the long term objectives.

Using the format transformation of FIST (Festival of International Student Theatre) as a case study – a festival organised by students of the FDA in Belgrade as part of their university studies curriculum, transformed into an online digital edition a few days before the pandemic had officially been declared and (self)isolation measures had been issued in Serbia – the research will explore tools for effective learning design models for creating new, interconnected communities of future professionals in the cultural field.

Horizontal academic networking as activity based e-learning platform for collaboration

Learning processes in a digital environment require a different teaching paradigm altogether (Palloff & Pratt, 2007), and from the standpoint of artistic practices may have different dilemmas or issues. During the course of the first wave of the pandemic, a large number of webinars for pedagogues at artistic academies took place, where the teaching models in the period of quarantine were discussed. Physical distancing has largely burdened universities around the world and brought the feasibility of these curriculums into question. This very fact could lean on the considerations of Paulo Freire who believed the educator must first seek to understand reality from the perspective of the students before he/she could encourage them to resist and transform their reality (Shor & Freire, 1987). Reality in the turbulent times is different and requires prompt answers, transformations and new learning design models and innovation practices. According to Freire, this process is preceded by shaping new channels of knowledge, new methodologies, new relationships between the subjects who seek knowledge and the most advanced technological innovations that we have at our disposal” (Boyd, 2016:180).

After the completion of policy strategies and several months of relative consolidation, the question arises of what the innovative education practices that accomplish all these tasks are, practices that create new communities and function in the context of 4D revolution. What does the process of transformation and design of learning models look like in a period of crisis? Some of these issues are also raised by Martinoli in her paper: What needs to be changed in the ways in which we teach and encourage students to learn and create; how is linking of possibilities and potentials of the physical, digital and technological reflected in learning methods and processes; What types of knowledge and skills need to be combined in order to create novel education profiles that match the perceived needs of the media, culture and arts market (Martinoli, 2019)?” In the processes of transformation it is necessary to understand influences and modes through which digitalisation changed the education environment: “on one hand, the market for which students are trained has changed. At the same time, behavioural habits of students have changed too – nowadays, they come to their universities with changed attention spans, new expectations, needs, ways in which they process information, ways in which they read, watch, listen, memorise and, ultimately, learn”. (Martinoli, 2019). It is, therefore, necessary for the contemporary education eco-system to take into account characteristics not solely linked to turbulent circumstances - Generation Z who have no experience of the world before the web, and who have experienced compulsory education primarily in an online environment, oriented towards the concept of superconnection of which sociologist Mary Chayko writes, where the online digital world is not independent of off-line physical environment, but is instead a part of it. (Chayko, 2019:12). Nowadays, the world is *superconnected* in technological and social sense, to the previously unimaginable extent, with virtually unlimited potential for further connections (Ibid.), and exchange and communication become its central subject. Considering the concept of superconnection in the field of education points out the need for understanding activity based education theories, their principles and characteristics,³¹ where in the early 20th century a shift was made from focus on information (and its particular content) aspects to emphasis on communication, collaboration and understanding the factors, which underpin the communities. Another characteristic of activity based learning listed in the paper “Mapping pedagogy and tools for effective learning design” is networking capabilities of the digital environment enable more diverse access to different forms of expertise and the potential for the development of different types of communities (Conole, 2004). Applying the model founded on activity based theories, collaborative learning concept has the possibility to form new communities not sustainable in individual learning models, and establishes principles that can have a long term effect on the environment. In the field of culture, creating collaborative practices based on the principles of activity based education (or philosophy) can contribute to shaping a new way of thinking where “community became more than the curriculum”. (21st Century Learning: Research, Innovation and Policy).

³¹Stemming from theoretical principles established by Vygotsky who contends...

Strategies and concepts of collaborative learning encompass multiple different methods of learning and educational approaches based on students and teachers working together. The methods of this form of learning vary, but they most frequently involve abolishing the strictly hierarchical relationship in which the educator is the one who conveys knowledge, and the student the one who adopts this knowledge without questioning – a teacher becomes an “expert designer of intellectual experience” (Leigh Smith and MacGregor, 1992). Even though this learning method is not new, it gained its crucial momentum thanks to technology development, opening new possibilities for establishing more complex and innovative processes of education. As was said in an introduction speech at the conference “Schooling for Tomorrow”, the need for interaction and collaborative practices is still needed today : “The explosion of knowledge about the brain and the nature of learning, combined with the growing power of technology, create the potential to transform even the most fundamental unit of education - the interaction of the teacher and the learner. Moreover, huge social changes, such as growing diversity and population mobility, present educators with new and constantly changing circumstances. As a result, the characteristics which defined the successful education systems of, say, 1975, are unlikely to be those which will define success in the future” (OECD 2003a: 115). Several years later, in the publication “Personalizing Education”, Sanna Jarvela, as a part of her research, states that “collaborative efforts and networked forms of expertise are increasingly needed in the future knowledge society”. Collaboration in this paper is seen as an effective way to work together to achieve shared goals in a complex, challenging environment (OECD, 2017; Friend & Cook, 2014; Bain 2007; Blue–Banning, Summers, Frankland, Lord Nelson and Beegle, 2004; Olsen, 2003).

In the current social contest, as a part of the action “Futures of Education: Learning to Become”, by International Commission on the Futures of Education, established by UNESCO in 2019, a document with guidelines was published, “Education in a post-COVID world: Nine ideas for public action”, which cites, as one of the nine guidelines, the significance of activities in the field of education that “value the teaching profession and teacher collaboration. There has been remarkable innovation in the responses of educators to the Covid-19 crisis, with those systems most engaged with families and communities showing the most resilience. We must encourage conditions that give frontline educators autonomy and flexibility to act collaboratively (Unesco, 2020). In order for these learning concepts to be possible at the current stage of rapid technological development, it is necessary to implement policies and measures that will impact *Digital competences for 21st century*. This means that there is the need for support to educators and learners to enhance digital education practices.

Adopting theoretical principles, recommendations and guidelines from educational policies imposes the need for designing a learning model that will fit in the current social context. From the perspective of artistic disciplines, practice in the previous months has shown that complete implementation of teaching in an online environment exclusively is not possible, but it is still necessary to rethink expanding the existing capacities in accordance with concepts of blended learning through various existing or newly-designed collaborative practices. One of them, proposed in this paper, includes connecting the schools for education in the field of culture management through a concept we called ***horizontal academic networking as an activity based e-learning platform for collaboration***.

In order to clearly understand the proposed concept, it is necessary to clarify the notion of blended learning method which plays a significant part in the design of the proposed platform. Blended learning method appears to have been in use since the late 1990s, but its precise connotations have changed and remodeled. Today blended learning has been understood as a combination of face-to-face and technology-mediated instructional forms and practices. In the context of the proposed model oriented towards education in the field of management in culture, i.e. active exchange and collaboration among teachers and students, it entails unified elements of curriculum of a (formal or informal) network of academies taking part in the program. Adopting strategic programs and protocols on collaboration in an online environment, the departments studying management in culture could attain translation of policy recommendations into the classrooms practices. Designing a learning model founded on the concept of activity based learning and establishing shared assignments for teachers and students of various artistic faculties would achieve a collaborative effect and creating communities that make the process itself a more creative and innovative one. Proposed platform of horizontal networking enables development of a hybrid learning model that, along with the traditional one, includes the need for a shift of the educational eco system founded on the needs of today's students. If we take into account the fact that integration of digital technology in traditional education an expectation for the majority of learners within higher education (Brown, 2015) and in particular for Generation Z, who have matured alongside the technology (How will Education 4.0 influence learning in higher education) blended learning (which includes digital environment) can be a helpful tool for strategic application of guidelines elaborated on in education concepts of the future. Various models of shared curriculum units in an online environment of multiple networked academies through one of the easy use platforms (zoom, jitsy...) enable shared lessons, guest lecturers, master classes and the process of creating assignments that students of different faculties complete towards a certain goal. In this way, collaborative groups of future professionals are formed, who, along with fulfilling the curriculum, become a community of

managers in culture, and the internationalized classroom becomes an arena for social activity with the shared values.

Drawing from the experience of FIST festival, which was transformed to a digital format due to Covid 19 crises, Faculty of Dramatic Arts –Department of Management and Production in Theatre, Radio and Culture initiated a pilot project of collaborative learning in an online environment. Creating a network of departments in the region, online sessions were planned, including lecturers and master classes from the field of regional festival practices in the countries of the Eastern Balkans. The festival form as a tool in the learning process has thus become a broader platform for an active collaborative cooperation of students and lecturers who together impact the exchange of knowledge and skills that they will later implement in their professional work in practice.

Redesign of the FIST Format in the Age of Crises

In order to understand the context of the changes and the transformation that happened, it is crucial that we explain what a regular edition of the Festival looked like and what its essential features were before the crisis, and, consequently, before the adaptation. The Festival of International Student Theatre (FIST) was created 15 years ago, at the initiative of students of the Department of Management and Production of Theatre, Radio and Culture at the Faculty of Dramatic Arts in Belgrade, and today it is part of the curriculum of the subject Theatre Production. FIST's mission is to create an environment that brings together young theatre professionals and give them a platform to share their experiences and show their skills, as well as present different theatrical practices of students from all around the world. Every year, the main organizers of the Festival are final year students of this department. The Festival is usually made up of the main program (competition program) with troupes from European theatre academies, two performances produced by FIST, FISTIĆ (festival program for kids), FIST Industry program (young theatre development support program), and the Warm-up program (pre-festival activities such as promo events, exhibitions, concerts). Starting from 2005 until today, FIST has had over 70 guest countries coming to the Festival, over 1,200 international students, about 50 eminent experts in the field of performing arts, over 30 performances in the Festival's production and more than 15,000 visitors. In terms of funding, the Festival is supported by the Ministry of Culture of the RS, the City of Belgrade – Secretariat for Culture, foreign cultural centers of the guest troupes' countries of origin, embassies and private sponsors, all contributing to the greater international visibility of the Festival.

The 15th-anniversary edition of FIST was supposed to be held in its regular format in March 2020, with its central theme of "Awakening" and the international slogan "Awakening is not a dream". The Festival was supposed to take place in several major theatres in Belgrade, the biggest and most

prestigious ones. The base mission of FIST is to serve as a platform for the exchange of knowledge, experiences, and ideas of young theatre professionals who will have a chance to collaborate internationally in the future, potentially in the format of co-productions. Under the pressure of the current global crisis, the last edition of the Festival did not keep its usual program form, and so the learning process and organizing was aimed at the decisions and changes that are analyzed in this paper using the parameters of values, activity theories and collaboration. The following text quotes FIST's statement published after the decision was made about the format transformation of the Festival into a digital platform titled FIST Society, and innovative practices were introduced, superconnecting the theatre community in turbulent circumstances:

*FIST Society is Inviting You to the Awakening. 15th Festival of International Student Theatre is Arriving in Digital Environment!*³²

“Given the current social situation on a global level, previously planned activities of the Festival of International Student Theatre (FIST) are taking place online. The Festival was originally supposed to gather 11 academies from all Europe in different theatres in Belgrade, but having in mind the recent social events, we are moving its activities to web. The final preparations for the Festival are being realized in the context of the current state of our society, caused by the occurrence and the expansion of the new type of virus COVID-19. Under these circumstances we have realized it is our humane, as well as artistic duty, to prevent potential further spreading of the virus both among the participants and audience within our country. Having all this in mind, we have reached a decision to redefine the concept and the message of this year's Festival, as we wish to react to current events responsibly and rationally – not only in the name of an international festival that gathers young people, but also as an institution that educates future theatre and performing arts professionals and artists and teaches them to create based on the community values. Moreover, we believe it is imperative not to stop intercultural exchange, learning and support under present circumstances, but to keep it in a new form, so that we ensure the awakening that we want and to encourage academic networking in challenging times.

The new conception of the Festival does not include the arrival of the troupes from abroad anymore, though it is including and presenting them with an innovative, contemporary and interactive way. Previous conception and form of the Festival are adapted and moved to online environment, the troupes from abroad will have the chance to participate via live stream or by broadcasting the videos of their plays as a part of main program. The audience will be able to follow this content online on our website and our YouTube channel. After the performances, there will be live online discussions with the professors of European academies regarding the role of arts in the times of

³²<https://www.iftr.org/news/2020/march/15th-festival-of-international-student-theatre-is-arriving-in-digital-environment>

social crisis and new art forms developed under these circumstances. Follow-up program will be realized through panels about the roles of artists and art in crisis, the meaning of solidarity, cooperation and mutual caring that helps better adjustments of everyday life to emergency situations at the global level. Exhibitions of the students of the Faculty of Fine Arts and Camera Department of the Faculty of Dramatic Arts will also take place digitally.”

The transformation of the Festival as a learning method in the digital environment has influenced our understanding of the potentials of innovative models enabled by the concept of superconnection, which to a large extent influences the criterion of learning design models founded on the concepts of activity based learning method and collaboration concepts. The following chapter will use the empirical case study method to observe the results of this criterion and their potential consequences on the implementation of new practices, thus contributing to shaping *new learning design models* suitable for the “new normal”.

Case Study: Innovative Approach in Management of the FIST Platform

As it is marked in the IETM report *Performing Arts in the Time of the Pandemic: Status Quo and the Way Forward* there is no sector in the global economic ecosystem which hasn't been impacted by the current COVID-19 crisis, and the arts sector has especially been hit hard, the most immediate impact being on the artists and institutions (Polivtseva, 2020). While the crisis was on the rise and the situation in countries within the region (e.g. Italy) was already dramatic, Serbia was yet to come forward with any guidelines, and none of the other cultural festivals or institutions in the country had cancelled their programs yet. However, eight days before the Festival opening, the FIST team started receiving emails from some of the theatre troupes about their flights being delayed. The management of the Festival decided to go with plan B, an exercise of implementing a new strategy following the principles of adaptable management. Based on SWOT analysis results, the FIST management team formed a proposal with the new festival format that was supposed to be in tune with the new circumstances surrounding it. The crucial moment in this learning process was collaborative finding an answer to the questions of what was now the mission of the festival as a curriculum, and how to design new methods of realization that would be aligned with a responsible management strategy?

The FIST team faced questions and dilemmas of proactive agency that involved creatively thinking about activities such as taking risks in implementing new realization methods. In the context of the „new normal” in a superconnected world, the concept of a creative hub, as described by Šešić and Dragojević, played a dominant part in communicating the altered concept of the Festival to the

public³³. The new concept included live streaming the main program on YouTube by having troupes perform at their schools, and the two FIST productions performing in theatres in Belgrade as planned. However, two days later, the government issued a ban on public gatherings over a hundred people, and after that, things were no longer changing on a daily, but an hourly basis. This new situation required a quick reaction aligned with the goals of a long-term implementation of the innovative approach of horizontal academic (informal) networking with the goal of reaching a shared goal of participation in realization of the festival (whether as an organizer or a participant).

After a state of emergency had been declared in Serbia, mentors from the management and production department and the FIST team moved the Festival entirely to an online format. Upon the new measures introduced by the RS government, the faculty building was closed down, and the Festival's main program director and the selector broadcasted the program from home with the help of technical support. It is interesting that by the end of that week all premieres and cultural events were cancelled, making FIST the only cultural happening at the moment, which made it, surprisingly, the number one (and only) media buzz around.

From the perspective of meeting the criteria of the parameters related to *activity based and collaborative theories*, a significant achievement of this year's FIST was oriented towards academic networking with partner schools; thus, audiences from all of the troupes' original environments came together to form a new, strongly united auditorium/society. Almost all broadcast performances had their international audience, and as YouTube analytics show, they were not just students; some of the participating viewers were from countries that did not even take part in the Festival. Analyzing the data after the Festival had ended showed that students from almost every part of the world attended the program in its new format, which would not have been possible with a festival practice happening inside a physical venue.

³³<https://www.youtube.com/watch?v=mG32l4qcNqE&feature=youtu.be&fbclid=IwAR3osts7Lj5l1gCBYftwup6y7CTurtuDT5yzD44mh0wD41tJqxm4deqH7HM> Video about making the Festival, how it was supposed to be, and how it turned out in the context of the pandemic.

Geography	Views ↓	Watch time (hours)	Average view duration
<input type="checkbox"/> Total	15,227	2,367.6	9:19
<input type="checkbox"/> Serbia	8,553 56.2%	954.6 40.3%	6:41
<input type="checkbox"/> Bosnia & Herzegovina	714 4.7%	116.3 4.9%	9:46
<input type="checkbox"/> Poland	209 1.4%	4.5 0.2%	1:17
<input type="checkbox"/> Germany	149 1.0%	29.9 1.3%	12:01
<input type="checkbox"/> Croatia	135 0.9%	18.1 0.8%	8:01
<input type="checkbox"/> Italy	117 0.8%	21.7 0.9%	11:09
<input type="checkbox"/> Switzerland	104 0.7%	13.3 0.6%	7:38
<input type="checkbox"/> Montenegro	102 0.7%	14.6 0.6%	8:36
<input type="checkbox"/> North Macedonia	22 0.1%	0.3 0.0%	0:50
<input type="checkbox"/> Austria	21 0.1%	4.0 0.2%	11:17
<input type="checkbox"/> Slovenia	13 0.1%	0.7 0.0%	3:10
<input type="checkbox"/> Czechia	10 0.1%	0.3 0.0%	1:38
<input type="checkbox"/> Mexico	10 0.1%	1.0 0.0%	5:48
<input type="checkbox"/> United States	10 0.1%	3.9 0.2%	23:12

Table 1. Spreadsheet showing countries of FIST program visitors in the digital environment

It is evident that there is no performer-audience exchange in a digital environment (at least not the kind Erika Fischer-Lichte writes about), yet a different sort of community formed as a result of this adapted concept. While watching the YouTube stream, the audience could join a chat room where students from all over the world would meet and interact, and then send clapping hands emojis at the end of the show. What is more, the authors of the performances also participated in the chat, so, along with the prerecorded Q&A, the audience could talk to the authors in real-time. When observing the criterion of the intensity of using program participation in new spaces compared to using services in the previous format, as well as the concept of availability, the usual situation in the previous years was that FIST had no issue with audience attendance, being one of the most significant events for young people in Belgrade during that time of year. However, the results of the innovations and new models in program realization can be observed in the example of comparing programs that happened during the Warm-up period through a series of panel discussions that had a great turnout; there would be 50 people in a room with no free seats left. But then, after the transformed platform FIST Society launched, there was a panel with over 800 viewers. Considering the entire program took place in a digital environment, the parameter of service users' degree of satisfaction with the new methods was observed through social media activity. The average organic reach on Facebook was 5,233 during the Festival (March 13-20), while the average reach of sponsored posts was 16,570; total reach for the period was 174,161. For the time of the preparations and realization of the Festival, the number of Instagram followers grew by 1,319 and during the Festival, 10,035 people visited the Instagram page³⁴. Evaluation by participants in program realization was analyzed using the results of the process of internal evaluation, in which team

³⁴Female visitors make up 75% of the Festival's Instagram audience. A major segment of the audience is within the 18-24 age group (42% of the total audience, both men and women) and the 25-34 group (41% of the total audience, both men and women). This means that 83% of FIST's Instagram audience is within the 18-34 age group, which is 16% more than its audience on Facebook.

members (30 participants) rated the process of transformation with the highest marks, as being an innovative approach that contributed to making a better team atmosphere.

Conclusion

Analysis of one of the aspects of contemporary relationship between education and information and communication technologies has shown that there is room for additional reflection on new learning models, in accordance with the present moment, but also the students' needs. Developing theoretical and practical concepts of learning in a digital environment but also policy documents created after the first wave of Covid 19 crisis has enabled the creation of a horizontal academic networking model as a blended learning platform making it possible to create a students' community. Case study has shown that at the times of crisis of the teaching process some new and expanded models of collaboration were opened between students and lecturers at 11 academies in Europe who have through their shared work contributed to a successful realization and reaching the shared goal. In this paper, collaborative process is viewed from the perspective of relationships and interactions, social and cognitive processes and capacities, organizational process, and learning. As a digital teaching method, FIST format and its programs became a tool for promoting values and critical thinking in turbulent circumstances, as well as a platform for creating new collaborative learning activities and practices for students.

Understanding the possibilities of hybrid learning models which combine traditional practices with the concept of horizontal digital networking between institutions points to the possibility of creating student oriented communities. Communities created in a digital environment represent new forms of socio-mental networking, because the connections are established between people (socio) and are maintained more cognitively than physically (thence mental) Chayko (2019, p. 55) and can have a long term effect on the processes of education, exchange and communication between the members of this community.

Potential problem related to the segment of collaboration in digital environment can be linked to the matter of physical presence. When we connect online, we often have the feeling that our collocutors are "actually there", the impression Chayko in her study refers to as *social presence* (Ibid: 69), whilst the sense of closeness or presence of others in spite of physical distance is called perceived closeness, (O Leary, Wilson and Metiu, 2014), or electronic closeness in case the connection is made possible by electronic media (Korzenny 1978; Walther and Barazova 2008). This type of perceived closeness, using the example of FIST, is observed through the process of watching a

play in digital environment together, where a group of students from different parts of Europe was formed on the YouTube channel chat, greeting the end of the play with an applause, using the applause emojis. Even though this type of community may seem a bit odd to our educators, data analysis showed that the students of Faculty of Dramatic Arts met students of other artistic faculties every day during the duration of the festival in this way, this time in a digital environment.

The shift of the overall education paradigm calls for adapting and the processes of transformation that can sometimes be longlasting and difficult to master. Teaching models at artistic faculties can by no means leave their teaching process up to digital challenges entirely, but it is necessary to consider potential models that are in accordance with “reality from the perspective of the students“. This “new reality” calls for prompt answers and solutions for new channels of knowledge and new methodologies.

REFERENCES

- Boyd, D. (2016). *What would Paulo Freire think of Blackboard: Critical pedagogy in an age of online learning*. The International Journal of Critical Pedagogy
- Conole, G, (2004). *Mapping pedagogy and tools for effective learning design*. Computers & Education
- Dillenbourg, P. (1999). *What do you mean by collaborative learning?*
- DeVane, B., and D. Squire K. (2012). "10 Activity Theory in the Learning Technologies." Theoretical foundations of learning environments
- Dragičević-Šešić, M. and Sanjin Dragojević (2005). *Arts management in turbulent times: Adaptable quality management: Navigating the arts through the winds of change*. European Cultural Foundation
- Newell C, Bain A. (2018). *Team-Based Collaboration in Higher Education Learning and Teaching*, Springer
- Kergel D, Heidkamp B, Kjærdsdam Telléus P, Rachwal T, Nowakowski S. (Eds.) (2019). *The Digital Turn in Higher Education - International Perspectives on Learning and Teaching in a Changing World*, Springer VS
- Martinoli, A. (2019). *Ususret izazovima obrazovanja za medije i kulturu 21. stoljeća: Nova znanja i vještine za digitalno, interaktivno i participativno okruženje. Medijska istraživanja: znanstveno-stručni časopis za novinarstvo i medije*, 25(2), 5-28.
- Palloff, R. M., & Pratt, K. (2007). *Building online learning communities: Effective strategies for the virtual classroom*. John Wiley & Sons.
- Rowan, L. (2019). *Higher Education and Social Justice: The Transformative Potential of University Teaching and the Power of Educational Paradox*, Springer International Publishing, Springer International Publishing, Palgrave Pivot

Shor, I., & Freire, P. (1987). *A pedagogy for liberation: Dialogues on transforming education*. Greenwood Publishing Group.

Smith, B. L., & MacGregor, J. T. (1992). What is collaborative learning.

Spiteri, D (2017). *Multiculturalism, Higher Education and Intercultural Communication: Developing Strengths-Based Narratives for Teaching and Learning*, Palgrave Palgrave Macmillan UK

OECD analyses 2020 - 21st Century Learning: Research, Innovation and Policy Directions from recent

International Commission on the Futures of Education. 2020. Education in a post-COVID world: Nine ideas for public action. Paris, UNESCO

European Commission - The Digital Education Action Plan (2021-2027) - Resetting education and training for the digital age

“Education without borders”: addressing online learning and inclusion through the lens of Museum Affinity Spaces (MAS)

Stefania Savva

Cyprus University of Technology, Cyprus
Stefania.savva@cut.ac.cy

Nicos Souleles

Cyprus University of Technology, Cyprus
nicos.souleles@cut.ac.cy

ABSTRACT

Emergent online learning tools and e-learning methods are now more than ever profoundly ‘popular tools’, in a post-digital world, especially after the coronavirus outbreak. In this paper, the intention is to provide with concrete evidence in response to the aforementioned concerns, through empirical insights from a postdoctoral research fellowship project, including insights from the period of the outbreak of the pandemic and beyond. The research, entitled Museum Affinity Spaces (MAS), through design-based research methodology, investigates sustainable and inclusive, online museum-school partnerships. There is specific focus to accommodate for inclusion of culturally and linguistically diverse primary and secondary education students’ needs. The project could not have been timelier, as it offers a digital infrastructure with tools, services and resources, for museum educators, schoolteachers and students. The developed platform has been tested during a prototyping phase, over two iterative cycles with a total of 250 participants from 16 countries in Europe.

Keywords:

Virtual Learning Environments, Museum Learning, Multiliteracies Pedagogy, Virtual Museums, Affinity Spaces

ACKNOWLEDGEMENTS

The project (POST-DOC/0916/0248) is awarded funding by the Research & Innovation Foundation in Cyprus, as part of DIDAKTOR programme.

Cultural heritage and inclusive learning in turbulent times

Emergent online learning tools and e-learning methods are now more than ever profoundly ‘popular tools’, in a post-digital world, especially after the coronavirus outbreak. In the past few hundred years of industrialized education, nothing has been more transformative than the COVID-19 crisis (Moravec, 2020). A remarkable 1.2 billion learners were left out of school and 341 million children were affected by school closures, as of May 2020 (UNESCO, 2020). A strategy of emergency remote teaching (Hodges et al, 2020) has been employed in the first instance, and now tends to become the norm for educational institutions across the world. This unprecedented situation, creates tension and challenges for the way education is delivered, and raises questions on whether the human dimension in education can be adequately addressed, through online contact alone.

One of the premises of the digital age, is to nurture opportunities for meaningful, engaging and culturally relevant, multimodally mediated learning for all. The issue is, how to facilitate for such opportunities for inclusive digital education. Teachers as facilitators of learning experiences, are required to re-consider their pedagogical approaches and improve their competences so as to empower 21st-century learners. Supporting teachers to implement inclusive digital education, is the pathway. The Digital Education Action Plan (2021-2027) (EU Commission, 2020), for “Resetting education and training for the digital age”, in a post-pandemic context, prioritises the development a high-performing digital education ecosystem and enhancing digital skills and competences for the digital transformation. One way proposed to succeed the latter, is via The European Framework for the Digital Competence of Educators (Redecker & Punie, 2020), through focusing on capability, as an essential element of successful inclusive schooling. Teachers and broader personnel should be supported to develop and improve their professional practice, in order to effectively respond to student diversity.

COVID-19 was disrupted our lives in an unprecedented way, and the cultural and education sectors, are amongst the ones affected the most. These sectors have had to make quick steps towards digital transformation at a time when the potential and need for digital cultural heritage in education might never have been greater. Europa Nostra has published a report showcasing the Challenges and Opportunities for Cultural Heritage, COVID-19 and beyond (EUROPA NOSTRA, 2020). Findings on the impacts of the COVID-19 pandemic on the heritage world, suggest implications in the cultural job sector, including for personnel who worked in the education departments in cultural sites. The crisis is real and multifaceted, therefore adaptation and solutions should come at an ecosystem level at these organisations, to be effective and sustainable. A lot of work has already been done to provide access to digital collections for use in education (take a look at European Classroom). Yet in spite of this, or more likely because of it, there is still more that can be

done to make online collections fit for education and provide for inclusive learning, in and through digital cultural heritage.

Background to the research project

Based on the challenges faced for education and cultural heritage sectors, and following the shift to online learning and engagement, our intention through this paper is to address the question: How do online environments help tackle exclusion among diverse students? What are the premises of virtual museum learning environments for online learning and inclusion? What kind of human/social relationships online learning exchanges create?

The intention is to provide with concrete evidence in response to the aforementioned concerns, through empirical evidence from a postdoctoral research fellowship project undertaken at a pan European scale. The grassroots of the proposed framework draw on a funded postdoctoral design-based research project, the Museum Affinity Spaces (MAS), investigating virtual learning environments (VLEs) as platforms for developing cultural participation and meaningful literacy engagement for diverse students. The challenge of interpreting and shaping hybrid learning spaces, relates to certain trends in the current educational landscape. These have been identified by Cristóbal Cobo, in Knowmad Society (Cobo, 2013) and can be broadly defined as:

- The mismatch between formal education and the challenges of the innovation society (informal and flexible learning approaches);
- The shift from what we learn to how we learn (life-long, self-learning, and learning to learn);
- The fluctuating relationship between digital technologies and content (ICT and critical thinking skills and new literacies);
- The changing conceptions of space-time and a life-long learning environment (which is rarely time or context dependent); and,
- The development of soft skills (global, tacit, and social).

In this paper, we address the aforementioned five trends through a particular design ecosystem framework, the Multiliteracies Dynamic Affinity Flow (MDAF) framework of practice. The MDAF framework, is grounded in the notions of affinity spaces (Gee, 2004), multiliteracies pedagogy (New London Group, 1996, 2000), and flow theory (Csikszentmihalyi, 1997; Kiili et al, 2014). We propose this framework as likely to inform the design, interpretation and evaluation of immersive

learning spaces, targeted specifically on inclusive practices and the potential multiliteracies surrounding us have, to develop flexible, multi-skilled learners.

MAS involves a design-based research investigation, into sustainable and inclusive, online museum-school partnerships. Our approach involves the design of a pedagogical framework which relies on a creative overlap between the theory of the New London Group (1996) for a pedagogy of multiliteracies, the theory of affinity spaces proposed by Gee (2004) and flow theory by Csikszentmihalyi (1988), adapted by Kiili et al (2014), for educational games. There is specific focus to accommodate for inclusion of culturally and linguistically diverse students' needs and provide pedagogical scenarios targeted at interdisciplinary learning in primary and secondary education, across Europe.

MAS approach is to offer to museum educators and school teachers and students with the kind of digital Infrastructure and support that is easy to access, lightweight end-user interface and framework to facilitate the use and adoption across formal and informal learning institutions. The intention is to promote sustainable engaging educational experiences. Educators will be supported and guided to develop, implement and share their educational learning scenarios and lesson plans and develop a wider community of practitioners that promote the best practices across Europe and beyond. Twenty first century learning spaces need to ensure “multi-skilled profiles” and “multi-contextual learning practices” (Cobo, 2013). The complexity of the world we live in, requires to prepare students for these competencies and digitally mediated literacy practices that they need to be flexible learners and designers of meaning making (Savva, 2019a). From the policy makers' and educator's perspective, the challenge is visible, as they struggle to catch up with the tensions arising from the gap between school worlds and out of school life, such as the transition to work and social life.

The dimensions of immersive learning environments should be incorporated into instructional design and curriculum, through the design of authentic tasks and evaluation processes to measure their effectiveness for learning that is relevant and meaningful to students' lives. This theoretical paper, draws on sociocultural traditions and ecosystem approaches to learning, to propose a conceptual framework for interpreting and shaping immersive learning spaces. Each paper may include visuals: graphs, charts, maps, photos illustrating and important example, etc. Insert tables and figures in the body of the text, following the paragraph in which they are first mentioned. The tables and figures must be accompanied by the title/legend and source and they must be numbered.

The pedagogical framework

The MDAF conceptual framework draws on sociocultural and holistic conceptualizations of pedagogy as cultural intervention in human development. In every community, different cultural factors and interactions act as cultural assets -material, immaterial, emotional, or even spiritual- to form creative cultural clusters (Lee, 2016). This local learning ecosystem approach allows connections across formal, informal, and everyday learning (Bevan, 2016).

Simply put, learning ecosystems comprise diverse provider combinations (schools, businesses, community organizations, and government agencies), creating new learning opportunities and pathways to success (Hannon, et al, 2019). Within the hybrid MDAF cycle, ecological synergies are of essence to explore knowledge producing processes. Figure 1 illustrates the MDAS framework and the different overlapping synergies within and across.

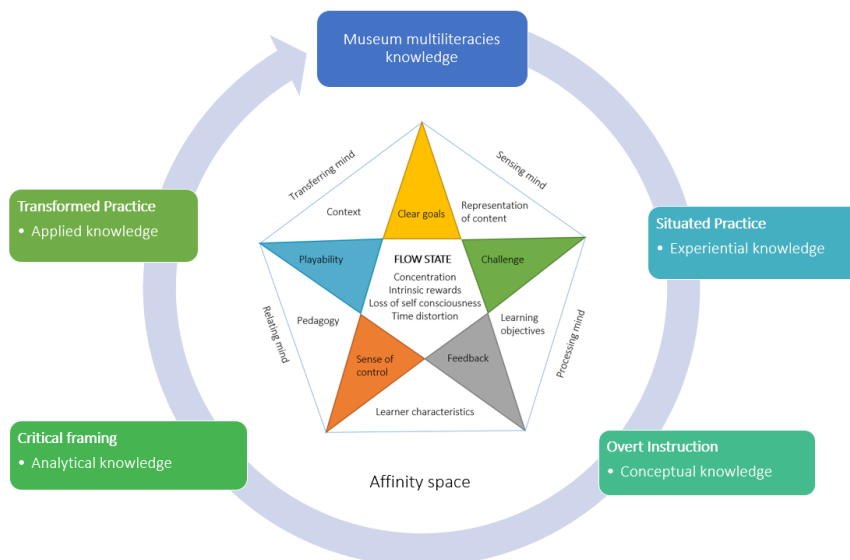


FIGURE 1. THE MULTILITERACIES DYNAMIC AFFINITY FLOW (MDAF) FRAMEWORK OF PRACTICE.

Source: Savva & Souleles (2019).

Affinity spaces

These learning ecologies are brought to life in virtual or physical affinity spaces (Gee, 2004), acting as community led, co-working spaces (CLCSs). Affinity spaces are social learning spaces where people interact and share ideas based on common interests, endeavors, goals, or practices, irrespective of race, gender, age, disability, or social class (Gee, 2004). Gee (2004) has opposed the traditional schooling system that persists and promotes dominant discourses and hierarchies and suggests an alternative view of schools. To make a claim on the previous, Gee is building on Jean

Lave and Etienne Wenger's (Lave & Wenger, 1991) concept of communities of practice, but in contrast to their definition of thinking about groups of people as being either 'in' or 'out' of a community, he suggests that we think of spaces where people interact. An affinity space is a place – virtual or physical – where informal learning takes place. Spaces can be real tangible spaces, like a classroom, or virtual spaces, like an online discussion forum or game. In discussing characteristics of what he terms "affinity spaces," Gee acknowledges how within the affinity space, people are not separated between novices and experienced in these affinity spaces but rather coexist (Gee & Hayes, 2009).

Affinity spaces encourage users to gain both intensive (experts or specialists) and extensive (broad knowledge shared with everyone) knowledge while also enable use of dispersed knowledge (available outside the affinity space) and also tacit knowledge (knowledge built up in practice not able to express with words) (Gee & Hayes, 2009). Learners or users of these spaces participate in varied ways and different levels, such as peripherally and centrally. Leadership is porous and leaders are resources; different people lead in different days, different areas, and resourcing, mentoring, advising people (Gee & Hayes, 2009). Gee points out that schools do not have the features of affinity spaces, since distributed knowledge, networking, and collaboration across and beyond the school rarely occurs. However, these are ways in which students interact and engage in their daily lives and should be incorporated in the school system (Morgan, 2010).

Multiliteracies pedagogy

To nurture learning that facilitates flexible, "multi-skilled profiles" and "multi-contextual learning practices" (Cobo, 13), we pertain to multiliteracies pedagogy (New London Group, 1996, 2000). Multiliteracies framework of thought acknowledges the complexities of practices, modes, technologies, and languages that literate people need to engage in the contemporary world as they navigate changes every day (Clark, 2007).

In the pedagogy of multiliteracies, learning is considered a process of meaning making, during which learners continually reshape themselves. Meaning making and any other semiotic activity are treated as 'a matter of Design' (New London Group, 1996, 2000). Drawing on the concept of design, we can speak of it as either the way in which a text has been designed, or to the process involved in designing (Cloonan, 2007).

Multiliteracies theory offers the notion of design to describe the codes and conventions of meaning-making modes and posits that there are six identified modes of meaning showing regularities or grammars (New London Group, 1996, 2000). These existing design elements can be linguistic, visual, audio, gestural, spatial or multimodal designs (New London Group, 2000). Students can

draw from existing designs to make meaning for their own purposes; in this way they become “active designers” (New London Group, 1996: 64) with the help of experienced others (educators) during overt instruction, which actually constructs the scaffolding of their learning (Cope & Kalantzis, 2000). The redesigned or transformed notions of meaning produced can then be used by others as available designs to draw upon (New London Group, 1996, 2000).

In a multiliteracies driven curriculum, two important ideas prevail: Learning by Design and Multimodality (Kalantzis & Cope, 2005; Kalantzis, et al, 2005). Learning by Design is building into curriculum the idea that not every learner will bring the same Lifeworld experiences and interests to learning, as well as acknowledging that every learner is not on the same page at the same time (Kalantzis & Cope, 2005). The idea of multimodality discusses learners’ movement between written, oral, visual, audio, tactile, gestural and spatial modes, which are combined during communication in order to produce meaning (Kress & Van Leeuwen, 1996).

The aim of literacy teaching with respect to multimodality lies in the acquisition of the abilities and skills which are necessary to produce various text forms linked with information and multimedia technologies (Baldry, 2000), which usually combine different semiotic media for meaning making. The “multiliterate” subject possesses a range of literacies (e.g. visual literacy, techno-literacy etc.), reads multimodal texts in an integrated fashion (paying attention to the relationship between the different semiotic modes being deployed) and produces multimodal texts managing various resources (Kress, 1995).

The goals and ideas of multiliteracies pedagogy in relation to affinity spaces, could be better situated using dimensions of flow theory. Being in “a state of flow”, or “optimal experience”, means to be immersed in a highly enjoyable state of consciousness, which occurs when our skills match the challenges we are undertaking.

Flow theory

Flow theory was introduced by Csikszentmihalyi (1997), who described it as a feeling of enjoyment and psychological immersion, energized focus, and involvement, accompanied by positive emotions. It has been empirically proven (Dunwell, de Freitas & Jarvis, 2011) that, whenever people reflect on their flow experiences, they mention some, and often all, of the following characteristics: concentration, time distortion, rewarding experience and loss of self-consciousness. During a flow experience, such as during game-play, a person is totally focused on the activity and is able to forget all unpleasant things. A concrete instantiation of how to interpret and shape immersive learning spaces, results from examining flow theory in relation to immersive educational experiences.

The benefits stemming from being in a flow state, have turned it into a meaningful goal for building virtual environments for online business, health care, education, and gaming. Flow theory has been a primary theoretical base for exploring the implications of learning through immersion or “being enveloped” by a virtual learning environment because the emotional composition of these experiences resemble flow and precipitate a deeper engagement with learning. Research has explicitly related the sense of “presence,” “being there,” “immersion,” or “flow” in different virtual reality interfaces with positive learning outcomes (e.g., Abrantes, & Gouveia, 2012; Fassbender et al, 2012). Flow framework has been employed for exploring educational games (Kiili et al, 2014)], and as such, informs the MDAF framework.

The elements of flow can be divided in two groups: flow antecedents (the colored star elements in Figure 1), and the Flow state. The flow antecedents (clear goals, challenge, feedback, sense of control, playability), are factors that contribute to the flow state and therefore it is important to consider them when designing a virtual learning environment. The dimensions of flow state (concentration, intrinsic rewards, loss of self-consciousness, time distortion), are more abstract and describe mostly the feelings of the flow experience. The white elements surrounding the star (context, representation of content, learning objectives, learner characteristics, pedagogy), reflect meaningful factors that affect the design of the learning experience and virtual-based learning artefacts.

Five mind lenses are proposed to interpret flow according to Kiili et al. (2014): (1) The sensing mind, (2) the processing mind, (3) the integrating mind, (4) the relating mind, and (5) the transferring mind lenses. These lenses, are founded on principles of cognitive load theory (Kirschner, 2002), multimedia learning theory (Mayer, 2004) and constructivism (Jonassen, & Land, 2002), and correlate with the knowledge processes described above within the Learning by Design Model by Cope and Kalantzis. Within the MDAF framework, the five sets of mind lenses (Kiili et al, 2014), provide means to consider IVLEs elements systematically from the learning and interaction perspectives and relates flow dimensions to learning processes. The abovementioned psychological factors of challenges, skills, engagement and immersion are considered critical characteristics of meaningful and deep learning experiences, and the MDAF framework applies them.

Methodology

The MDAF framework was implemented in the field as part of the Museum Affinity Spaces (MAS) project, a postdoctoral research investigation co-funded by the Restart Program and the Cyprus Research Promotion Foundation. The research team adopts a Design Based Research (DBR) methodology (McKenney & Reeves, 12), which involves cycles of iterative development of solu-

tions as applied to pragmatic and complex educational problems in schooling contexts. The project is structured into three phases: the preliminary analysis, the prototyping stage, and the implementation and evaluation or assessment (Figure 2).

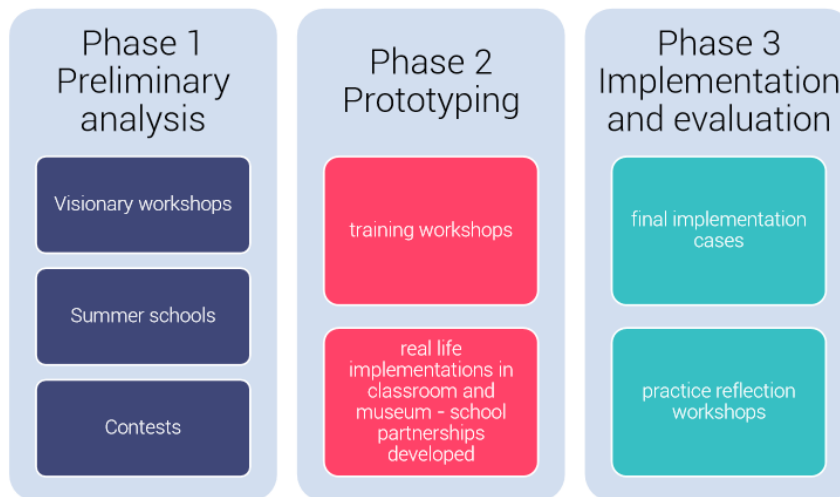


FIGURE 2. DESIGN-BASED RESEARCH METHODOLOGY AND SUSTAINABILITY PLAN.

Source: Savva and Souleles (2019).

An array of data will be collected to cross-reference interpretations (Yin, 2012), including:

- i) Researcher-facilitator video-recorded observations of interactions reported in field notes;
- ii) Questionnaires with teachers;
- iii) Focus group interviews with teachers prior and after the implementation;

Triangulating the wealth of data from the various methods will result in the overall evaluation of the implementation of the PD. In relation to the target population of this study, the preliminary phase will involve a comparatively large number of teachers to identify the needs of the population, however the implementation will only involve a smaller sample of approximately 100 museum staff, teachers and students from 6 EU countries as users of the platform.

The intention is to gain an in-depth understanding of these teachers' experiences and thus a smaller sample will be preferred. Drawing on the larger group, the intention is to work more closely with these teachers on a regular basis to design and implement teaching, which they share with the larger group; this larger group addresses other needs of PD, most times taking a broader look at material, providing feedback, trying-out smaller parts of the designed curriculum, etc.).

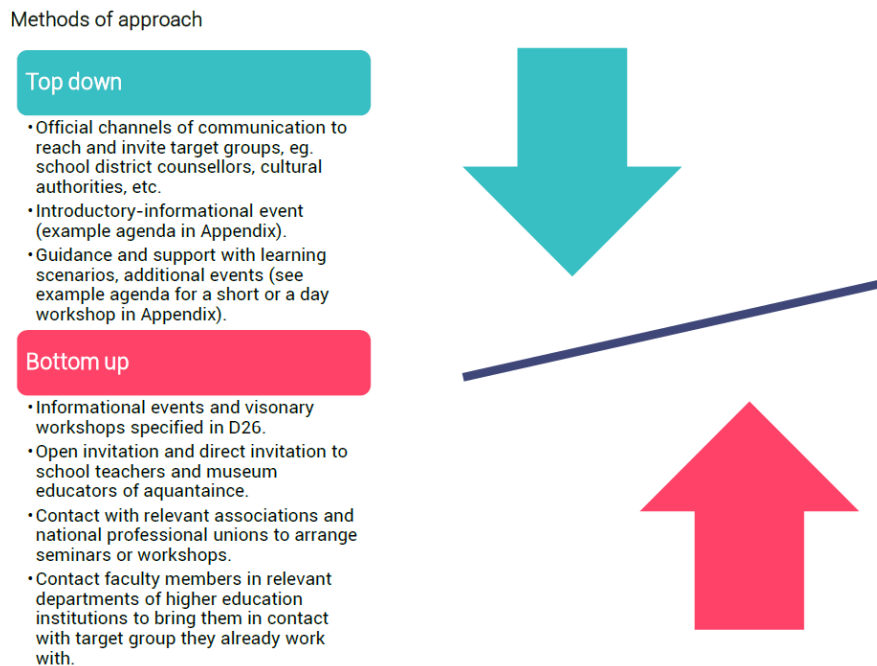


FIGURE 3. METHODS OF APPROACH FOR IMPLEMENTATION IN MAS – PILOTS.

Source: Savva and Souleles (2019).

The Prototyping Phase of the project involves the development of the MAS Infrastructure. This presents a common operational framework for support tools and services in MAS, which aim to engage different stakeholders (teachers, museum educators, policy makers, students etc.) with the goals and products of MAS. The project’s MDAF Pedagogical Framework and DBR guidelines have constituted the basic background on which the specifications for these tools and services have been developed, keeping in mind the need to make the tools coherent among themselves and integrated with other tasks.

The targeted breakthrough of the MAS project is dual: first it involves the development of necessary tech infrastructure for the establishment of global museum-school partnerships, involving a holistic multiliteracies-based approach: it does so by creating a strategic partnership search finder tool (MAS-Portal), with personalized advanced features.

Secondly, the MAS project features a virtual museum environment (Museum Cabinet app), following design principles from the specific theoretical framework and pedagogical scenarios developed.

To complement the two main tools, the project envisages opportunities for free and continuing online professional development for educators and museum staff, through access to resource packs, tutorials and webinars on how to deliver successful museum-school partnerships for developing lesson plans based on the MAS framework (MAS-Archive).

Further to this, a forum will be designed as online museum and school hub spots (MAS-Hub). The MAS Project assets, will contribute to the field by offering a lightweight end-user interface going beyond isolated initiatives, to bridge the gaps in networking capabilities of museums and schools as well as current virtual museum creators. The objectives and infrastructure for MAS are presented in Figure 3.

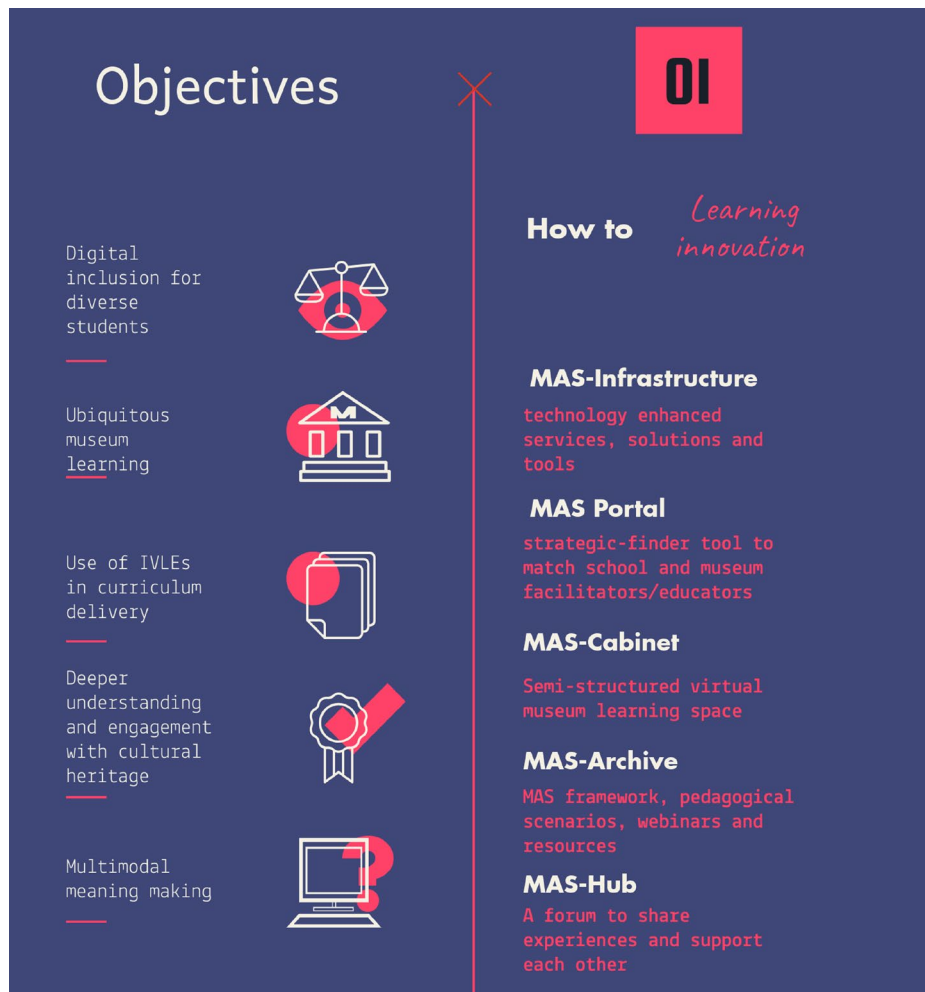


FIGURE 3. THE MAS INFRASTRUCTURE.

Source: Savva and Souleles (2019).

Implementation and assessment schema

To assess how each student meets the criteria in each of the knowledge processes and define their level of performance, the Multiliteracies Performance Assessment Zones (MPAZ) tool of evaluation was developed and tested (Savva 2016; Savva, 2019b). The MPAZ incorporates the ‘Learning by Design Criteria for Measuring Learning’ (Kalantzis et al, 2005: 95-97), the different levels of knowledge, namely demonstration of experiential knowledge, conceptual knowledge, analytical

knowledge and applied knowledge, as well as the multiliteracies experience of students. The pedagogical schema is presented in Figure 4.

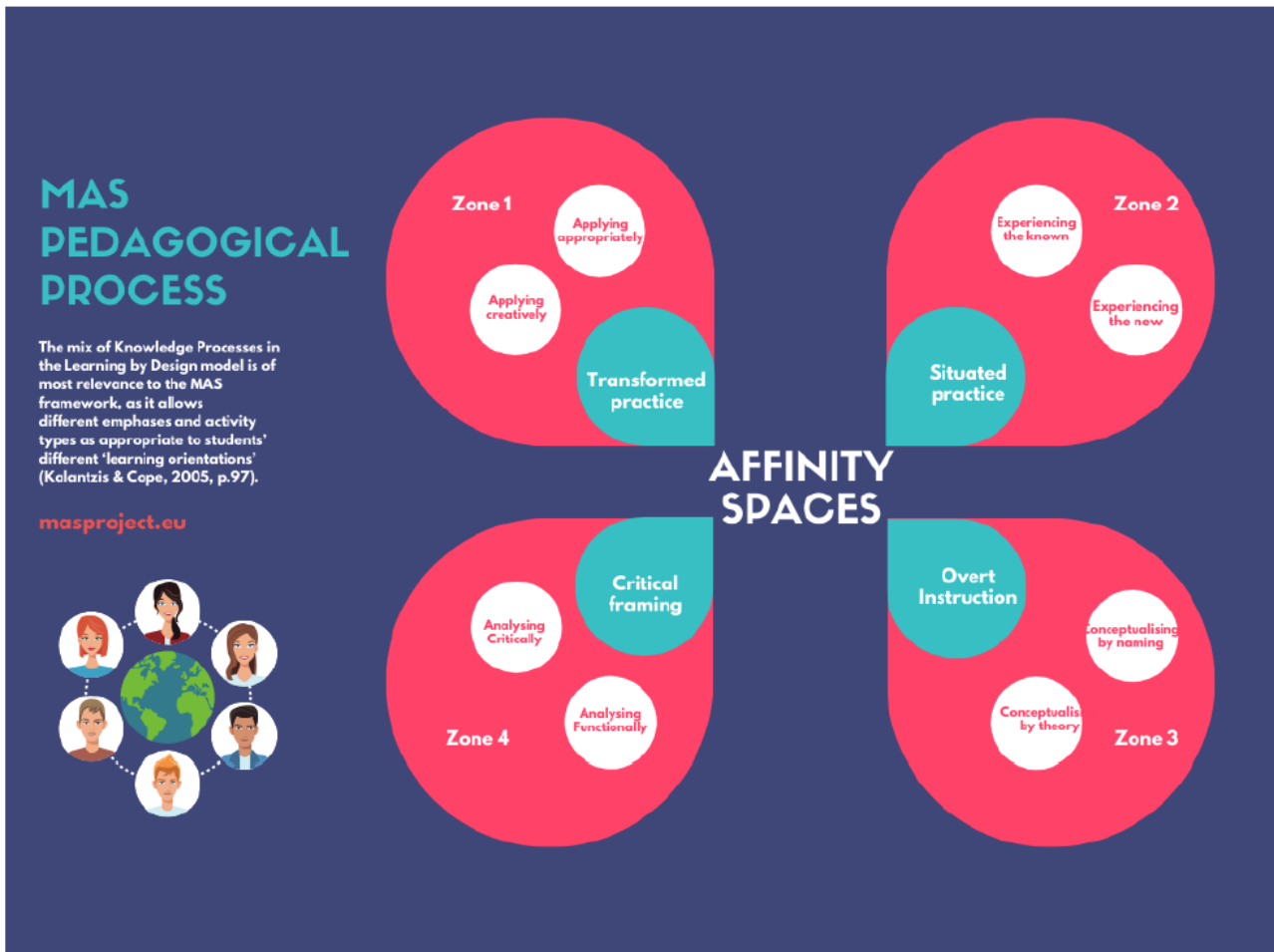


FIGURE 4. THE MAS PEDAGOGICAL PROCESS.

Source: Savva and Souleles (2019).

In regards to each of the knowledge processes, three levels of performance exist that define how a student moves from the competence to think and act with assistance, to the competence to think and act independently, and finally the competence to perform collaboratively. These reflect: 1) assisted competence, 2) autonomous competence and 3) collaborative competence, with the former being considered the most difficult and higher order level to achieve.

The Four Resources Model adapted by Luke and Freebody (90) is also considered involving namely: the functional dimension, the meaning making dimension, the critical dimension and the transformative dimension. These dimensions correspond respectively to each of the knowledge

processes on the Assessment Schema by Cope and Kalantzis, and together reflect a zone of multiliteracies competence.

Pedagogical scenarios-based approach Phase 1: preliminary needs analysis

One premise of the MAS project, was to validate and refine the design-based methodology and prototype of the portal created, through the different iterative phases of the project in different pedagogical scenarios. Developing specific online interactive learning resources –toolkits, scenarios, and webinars derived from the MDAF framework, and from the input of users of the platform. Figure 5 presents an example of a learning scenario developed.

MAS
Museum Affinity Spaces
www.masproject.eu
Collaborate. Learn. Include

Learning Scenario: Story Maps

At a glance

Knowledge process:
Analysing functionally

Language:
English

Preparation time:
15'

Average Learning time:
45 minutes

Works offline:
Yes

Tip: You can use online tools like Glogster to create your story map

DESCRIPTION

Arguments matter.

This scenario entails the 'Story Map' technique, a strategy that helps students to build a framework for understanding and remembering a narrative, thus 'shines a spotlight onto practice that can lead to self-reflection and improvement' (González and Frumkin, 2016, p.31). This will be utilised for encouraging students to report in written form about their understandings of a text found in the virtual museum.

Story Maps:

- provide a useful visual outline for analysing narratives
- provide a means to organise information
- reinforce key elements of a narrative
- provide a clear model for writing summaries and responses to narratives they have read.

A story map can look like a map which the students draw freehand or include a structure such as a star.

Students can then report orally or in written form about their understandings gained from the text. They can develop a meaningful summary, linking together key information from the Story Star to demonstrate their knowledge and understanding of the text.

Story Map Diagram:

```

    graph TD
      Who[Who? (characters)] --- Star(( ))
      What[What happened? (events of the text)] --- Star
      Why[Why? (cause & point of view)] --- Star
      How[How did it end? (conclusion)] --- Star
      Where[Where? (setting)] --- Star
  
```

FIGURE 5. EXAMPLE OF A LEARNING SCENARIO DEVELOPED AND IMPLEMENTED.
Source: Savva and Souleles (2019).

By using the virtual platform, teachers, museum staff and students are supported in understanding cultural aspects of the world around them and taking decisions about their cultural participation. In addition, there is an increased potential for students to expand their repertoires of literacy practices by engaging in these sort of activities. Personalisation features and resources are designed taking into consideration learning preferences, competence levels, subject domains, and contexts.

The MAS resources are fit to be integrated into regular class-room activities as well as extracurricular activities. To facilitate this process, MAS project offers pedagogical and technical creation, experimentation and sharing techniques and tools, for teachers and educators to:

Encourage them to implement projects aimed at culturally and linguistically diverse students (CLD), using museum multiliteracies based theory and the Portal developed as well as virtual museum learning capabilities.

Promote a greater appreciation among these educators on the role of scientific museums as a tool to engage students and promote learning opportunities and social inclusion for culturally and linguistically diverse students.

Guide the preparation of activities deriving from the MDAF framework.

To access concrete instructional scenarios that facilitate the design of realistic and engaging activities.

And to adopt, enrich, and/or modify these activities through an online community.

The MAS Portal features a virtual learning environment which can be manipulated by the users, following design principles from the specific theoretical framework and pedagogical scenarios developed/proposed. This affinity space created in the form of a desktop application, namely the 'Museum Cabinet app', constitutes an important feature of the infrastructure created. The lightweight end-user interface goes beyond isolated initiatives, to bridge the gaps between theory and practice in the design of virtual learning environments and delivery of curricula. The interactivity features enable user interaction and modification of elements in the environment. Some images follow in Figures 6, 7 and 8.



FIGURE 6. THE RECEPTION ROOM OF THE MAS CABINET APPLICATION.

Source: Savva and Souleles (2019).

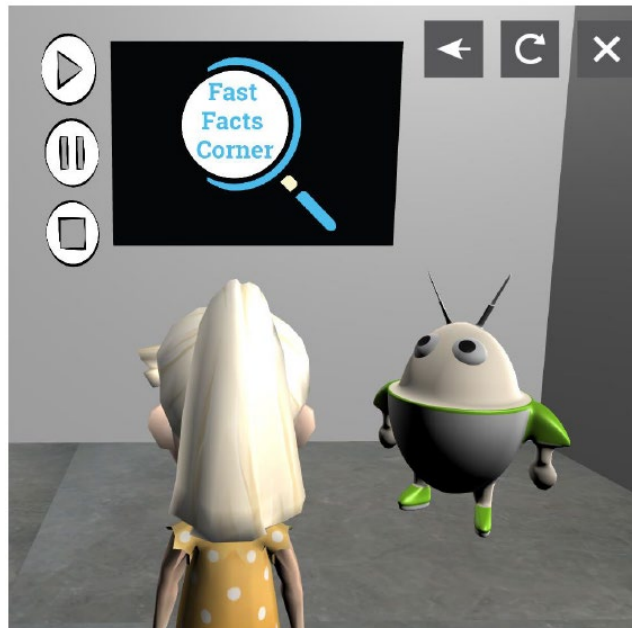


FIGURE 7. THE “FAST FACTS CORNER” IN THE MAS CABINET.

Source: Savva and Souleles (2019).

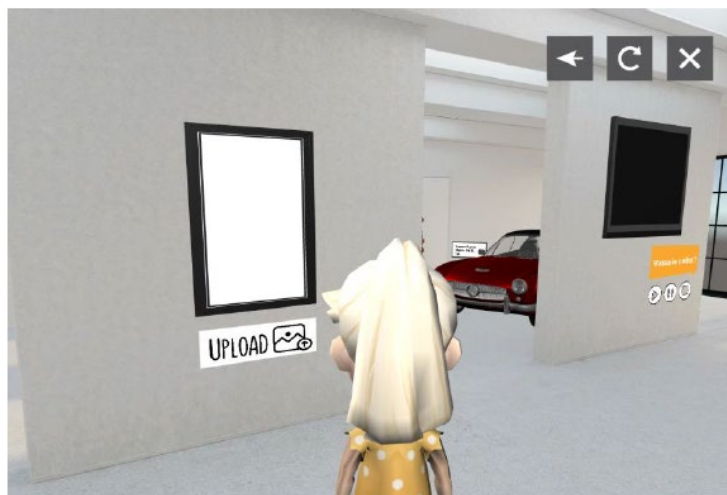


FIGURE 8. THE UPLOAD FEATURE OF THE MAS CABINET APPLICATION.

Source: Savva and Souleles (2019).

Phase 1: preliminary needs analysis

The design, implementation and findings of Phase 1 “Preliminary Analysis”, included observations, interviews and surveys with 200 practitioners (museum educators and school-teachers) and 70 primary and secondary students from 12 EU countries. The findings suggested overall positive attitudes towards learning in and through virtual learning environments.

Visionary Workshops (following a three-step process) are to be organised locally in the participating countries in M3-M8. The Visionary Workshops will provide direct input from the stakeholders (museum educators, teachers, teacher trainers, museum directors, school administrators, curriculum developers, policy makers, etc). Visionary workshops can be arranged ad-hoc by the MAS team or be collocated with other “important” relevant events (e.g. exhibition, training event, conference).

The proposed format is a half-day workshop which unfolds in 3 phased sessions:

Two Visionary Workshops are to be organised in two piloting countries (happened in Cyprus, and Portugal).

It is proposed that M3 to M8 are used to organise the Visionary Workshops. The suggestion is to organise the first VW in the period March-April and the second in the period May-June 2019.

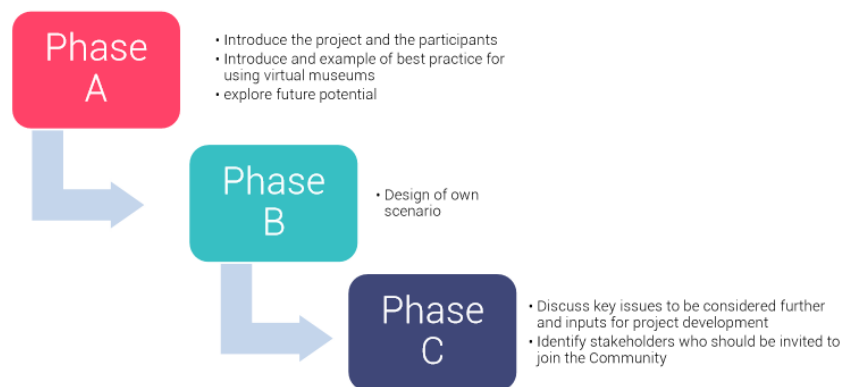


FIGURE 9. ACTION PLAN IN MAS PHASE 1.

Source: Savva and Souleles (2019).

Both the school teachers and museum educators appreciated the idea of using virtual museums for teaching, as well as expressed the view that potentially such interactive learning is meaningful and appealing to students. A perceived understanding is that virtual museums could enhance learning opportunities for culturally and linguistically diverse students.

There was some level of uncertainty on how to use the technology, and if it is feasible to implement it in actual classrooms, with the limited time available. This opinion was prevalent among teachers, especially those who are not familiar with virtual museums or museum pedagogies at large. It was also mentioned that perhaps it is difficult to match the content of the virtual museums with all subjects. The more experienced teachers and museum educators, seemed eager to know more about the MAS Platform. The following paragraphs address some of the emerging themes among educators and students.

Findings from the field

For the participants, a virtual museum environment, when designed with specific Pedagogical Framework in mind (such as the MDAF), is a motivating apparatus for engaging students to cultural heritage and participation, as well as interdisciplinary learning.

They recognised the potential of the virtual museums to enable students to discover phenomena and knowledge about topics in different ways, promoting critical thinking, more profound understanding and multimodal meaning making and awareness, while also encourage acquisition of key ICT skills.

Most of the participants expressed willingness to try out the MAS Cabinet (Virtual Museum environment) and other features of the MAS Platform. Some participants even spoke about the potential to teach using the Infrastructure provided, via videoconferencing, when students work remotely at home.

Training and pedagogical scenarios requirements

It was unanimously considered good practice to have some form of training before using the MAS Platform for the first time. This could be a workshop or webinar, even a test drive in a way of the tools to familiarise with the interface. Other useful prompts would be small helpful tips, short screen casts and online user guides on performing various tasks in the environment. Some sort of forum for communication of ideas and sharing of learning plans and successful scenarios were thought to be imperative.

Organisational and Technical Barriers to Museum-School Partnerships and Virtual Museum Use

Individual barriers and their possible solutions proposed by the participants are presented in Table 1 and discussed subsequently.

Type of Barrier	Freq.	Type of Barrier	Freq.
Organisational		Technical	
Usability problems and content issues	28	Lack of experience with ICT	8
Limited access to the Internet and ICT	28	Ready-made solutions with low modifiability	6

Lack of time and curriculum match	17	Insufficient funding	3
Lack of training	14	Inadequate school support	3
Student management issue	9		

TABLE 1. THE CATEGORIES OF ORGANISATIONAL AND TECHNICAL BARRIERS DERIVED FROM PHASE 1 DATA.

Source: Savva and Souleles (2020).

In discussing potential barriers to develop museum-school partnerships and use the MAS Cabinet (virtual museum environment) created, certain challenges were identified, categorised and sorted in terms of frequency. The findings from the interviews conducted with museum educators and school-teachers suggest that there was a generally positive stance toward the implementation of virtual museums in their everyday professional routine. However, participants raised a number of important requirements, and expressed concerns over identified obstacles to meaningful implementation.

Participants were given opportunities to reflect on their current teaching approaches and propose improvements or recommendations for the development of the MAS Infrastructure. These interviews complemented the findings from the surveys with a larger number of museum educators and school-teachers from across Europe. Significantly, these findings laid the important groundwork for the participants to build the community that could support the continuous professional development of the teachers and the sustainability of the work of MAS project.

Clearly, there are still a range of personal, social, technical and organisational issues to be addressed for the mass uptake of virtual museums and establishment of sustainable museum-school partnerships. To gain more insights into the facilitating and hindering factors for the integration of virtual museums into the existing curricula and real practices, museum educators and teachers were invited to develop scenarios on deploying virtual museums in their everyday teaching. This objective is realised during the Prototyping Phase 2 of the MAS project, lasting from May 2019 until May 2020.

Phase 2: prototyping and iterative cycles of development

Following the preliminary needs analysis, 3 implementation activities were undertaken, 2 physical (Nicosia, Cyprus) and 1 virtually (using the online MAS platform). Of which, 1 was an activity with students (with 67 participants) and 1 was online training of museum educators and school teachers (with 28 participants) and 1 was training of school teachers (16 participants). Phase 2 lasts from M8-18 and begins with the first iterative cycle. It involves 111 participants from 9 countries and is completed in M12. In total 10 schools and 4 museums were involved in these activities. For the first iterative cycle of the MAS project, to be reported here, the physical implementation activities were conducted in Nicosia, Cyprus, and engaged participants from 4 countries (namely Cyprus, Greece, Portugal, Italy). During the virtual training, participants from 9 countries took part. Proposed implementation activities are listed in Figure 10.

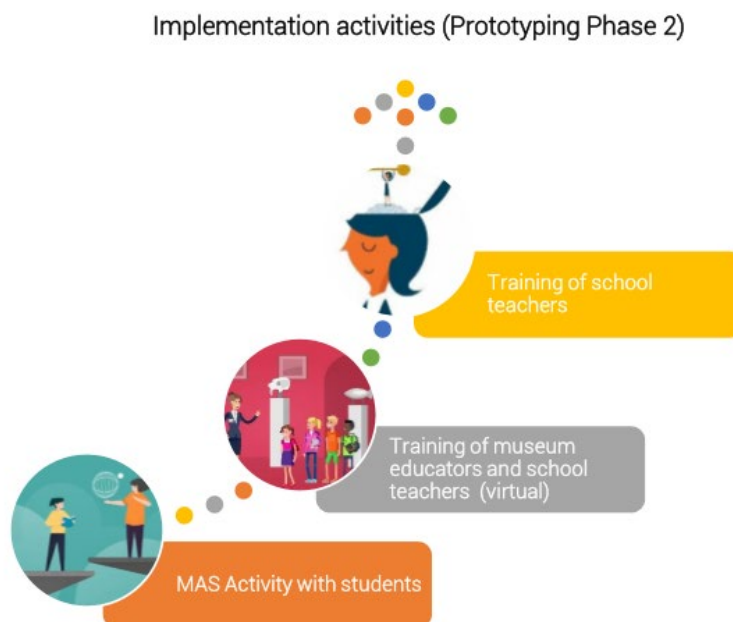


FIGURE 10. IMPLEMENTATION MAS PHASE 2.

Source: Savva and Souleles (2019).

The intention was to proceed with revised implementation activities during year 2 of the project, In M12-M24. The second iterative cycle would ideally involved 140 participants from 12 countries and last until M18. The provisional plan is displayed in Figure 11.

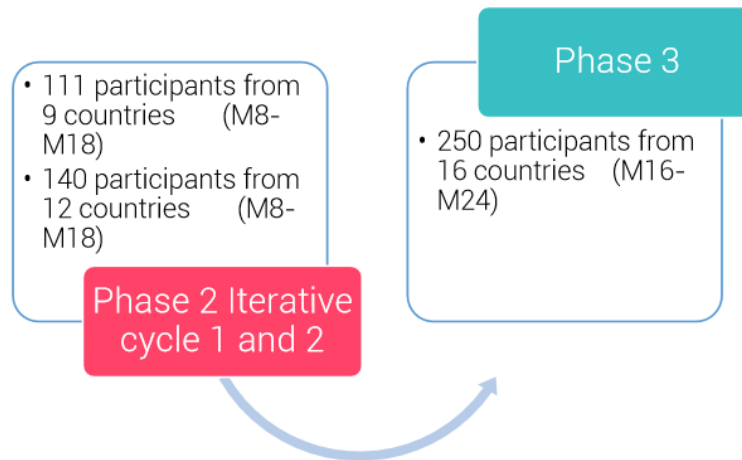


FIGURE 11. IMPLEMENTATION MAS PHASE 2.

Source: Savva and Souleles (2019).

Due to the COVID-19 pandemic, the implementation activities were adjusted to meet the challenges and restrictions of the situation. The MAS team conducted and coordinated 3 implementation activities in Cyprus and online. Two training activities (online and physical) for museum educators and school teachers were organised, with 44 participants. The activities with primary-school students involved 67 participants using the MAS Cabinet and related pedagogical learning scenarios. The subject domains of these activities focused on language arts, technology and history.

Findings

The final Implementation and Evaluation Phase of the project will be completed in October 2020. The analysis so far has produced significant findings into the potential of the proposed framework for online learning in the post-digital era, following the Covid-19 pandemic. The findings also suggest the creative potential of the online human relationships arising, while interacting within the virtual or augmented learning environment. The following paragraphs address the questions raised at the beginning of this paper:

How do online environments help tackle exclusion among diverse students?

As the project involved the development of an interactive virtual learning environment in the form of a desktop application, tested and evaluated for use across the curriculum, it was evident that immersive and/or virtual learning experiences/exhibitions and virtual worlds, can enhance the literacy repertoires of otherwise excluded students.

The multimodal character of the virtual learning environment, allowed for varying methods and approaches towards language learning and engagement. Audiovisual material enhanced diverse students' understanding of the concepts to be learned, and facilitated their engagement towards anticipated learning outcomes. Findings from post-intervention classroom observations, reflective interviews and my field notes indicate that the MDAF framework utilised, supported the enactment of the museum multiliteracies-based approach and contributed to changes in students' learning. It was evident that through exciting students over known concepts, this not only helped to elicit their prior ideas and conceptions, but also attracted their attention to the lesson, and generated curiosity. What is more, the systematic use of multimodal literacy modes resulted in increasing students' interest to participate in the activities.

In particular for the CLD students in this research, engagement in the online activities, enabled them to express themselves more freely and gain confidence in working as part of their groups for completing different tasks.

What are the premises of virtual museum learning environments for online learning and inclusion?

The experiences of participants, from this multimodal, digitally-mediated practice, provide with design principles for developing meaningful online learning scenarios. The importance of such innovative experiences lies in sharpening the processes of inquiry and learning and enhances seamless participant collaboration and exchange. Working alongside these realisations, the project exemplifies the affordances and promises of meaningful online cultural practice and awareness to nurture inclusion and interdisciplinary learning. Their existing knowledge of, and interest in, computer mediated literacy modes was matched with new knowledge to undertake different tasks in the virtual museum environment. Reflecting upon the use of digital and other multimodal and public forms of literacy such as drama and play, teachers considered computer technology as a motivational thing for their students. Such instructional practices can help maintain students' interest in the lesson and ultimately bridge the gap between the literacy practiced in school and those in their everyday life.

What kind of human/social relationships online learning exchanges create?

The post-intervention findings indicated improvement from the pre-intervention classroom observations in terms of students' affective outcomes. Students felt empowered as they contributed in the learning process, i.e. through interaction with their teachers, materials and their peers. The collaborative element in design and delivery of the learning scenarios and use of the dedicated MAS students spaces, resulted in group work that appeared improved in terms of communication and un-

derstanding between participants. Reflective self-evaluation of their work and performance performed online, enhanced students' understanding of what had been taught during each session.

Conclusions

At the writing of this paper, the findings from the Implementation of the MAS project are analysed and interpreted, in the context of COVID-19 and beyond. The analysis will inform the policy recommendations and revision of tools developed in the MAS infrastructure. This will be disseminated at the project's technical team and national coordinators, so that their work will be guided by the results and experiences already gained by the partners both with the activities carried out so far in MAS and by the analysis of research documents from the field.

The next steps therefore, include the intention to refine pedagogical and technical specifications for the MAS Infrastructure and community building systems in terms of satisfying different user groups' needs and providing easy access to the projects' tools and materials as appropriate. This will lead to the validation of tools and enable the project team to scale the project through available funding sources, especially in an attempt to provide with practical tools for implementation in the classroom.

REFERENCES

- ABRANTES, S. (2012) Using games for primary school: assessing its use with flow experience. In M. M. Cruz-Cunha, Ed. *Handbook of research on serious games as educational, business and research tools*, Hershey, PA: Information Science Reference, 769-781.
- BALDRY, A. P. (2000). Introduction. In A. Baldry, Ed. Campobasso, *Multimodality and multimedi-ality in the distance learning age*, Italy: Palladino, 11.
- BEVAN, B. (2016). STEM Learning: Ecologies Relevant, Responsive, and Connected. <http://csl.nsta.org/2016/03/stem-learning-ecologies/>
- CHRISTAL, M. (2001). *Virtual museums from four direction: An emerging model for school museum collaboration*. Reports–Research. Speeches/Meeting Papers.
- Clark, K. R. (2007) Charting transformative practice: critical multiliteracies via informal learning design. UC San Diego Electronic Theses and Dissertations.
- CLOONAN, A. (2007) The professional learning of teachers a case study of multiliteracies teaching in the early years of schooling. (Unpublished thesis). School of Education Design and Social Context Portfolio.
- COBO, C. (2013) Skills and competencies for knowmadic workers. In J. Moravec, *Knowmad Society*, Ed. Education Futures, 57-88.
- COPE, B. (2000) *Multiliteracies: Literacy learning and the design of social futures* (Eds.). London: Routledge.
- CSIKSZENTMIHALYI, M. (1997) *Finding Flow: The Psychology of Engagement with Everyday life*. New York: Basic Books.

- DUNWELL, I., DE FREITAS, S., AND JARVIS, S. (2011) Four-dimensional consideration of feedback in serious games. In S. de Freitas and P. Maharg. Eds. *Digital Games and Learning*, Continuum Publishing, 42-62.
- DYJUR, P, LINDSTROM, G. Perceptions and Uses of Digital Badges for Professional Learning Development in Higher Education. *Tech Trends*, 61, 386–392. DOI 10.1007/s11528-017-0168-2. 2017
- EAKLE, A. J. (2007) Museum literacy, art, and space study. In J. Flood, S.B. Heath, D. Lapp (Eds.), *Handbook of research on teaching literacy through the communicative and visual arts* (2nd ed.) (pp. 179–188). Newark, DE: International Reading Association.
- EAKLE, A. J. (2009) Museum Literacies and Adolescents Using Multiple Forms of Texts on Their Own. *Journal of Adolescent and Adult Literacy*, 53(3), 204-214.
- EUROPA NOSTRA (2020) COVID-19 & BEYOND. Challenges and Opportunities for Cultural Heritage. Italy.
- EU COMMISSION (2020) Digital Education Plan (2021-2027).
- GEE, J. P (2004) *Situated language and learning: A critique of traditional schooling*. New York: Routledge.
- GEE, J. P, HAYES, E. (2009) Public pedagogy through video games: Design, resources & affinity spaces. *Game Based Learning*. <http://www.gamebasedlearning.org.uk/content/view/59/>
- HANNON, V., THOMAS, L., WARD, S., BERESFORD, T. (2019) *Local Learning Ecosystems: Emerging Models*. WISE report series in Partnership with Innovation Unit.
- JACKSON, S., R. ADAMSON. (2009) Doing it for the kids: Tate Online on Engaging, entertaining and (stealthily) educating six to twelve-year-olds. Paper presented at the Museums and the Web conference 2009: The international conference for culture and heritage online. (Available from: <http://www.archimuse.com/mw2009/papers/jackson/jackson.html#ixzz0mAR0DOMO> Retrieved 9/12/2018)
- JONASSEN, D.H. LAND, S. (2002) Preface. In *Theoretical Foundations of Learning Environments*, D. H. Jonassen and S. Land, Eds. Lawrence Erlbaum Associates, iii–ix.
- KALANTZIS, M., COPE, B. (2005) *Learning by design*. Melbourne, VIC: Victorian Schools Innovation Commission and Common Ground. 2005
- KALANTZIS, M., COPE, B. LEARNING BY DESIGN PROJECT GROUP. (2005) *Learning by Design*. Melbourne: Victorian Schools Innovation Commission and Common Ground. 2005
- KIILI, K., LAINEMA, T., DE FREITAS, S., ARNAB, S. (2014) Flow framework for analyzing the quality of Educational Games. *Entertainment Computing*, 5 (4), 367–377. DOI:10.1016/J.ENTCOM.2014.08.002.
- KIRSCHNER, P. (2002) Cognitive load theory: implications of cognitive load theory on the design of learning. *Learn. Instr.* 12, 1–10
- KRESS, G. (1995) *Writing the future: English and the making of a culture of innovation*. Sheffield: National Association for the Teaching of English.
- KRESS, G., VAN LEEUWEN, T. (1996) *Reading images: The grammar of visual design* (eds). New York: Routledge.
- LAVE, J. AND WENGER, E. (1991) *Situated learning. Legitimate peripheral participation*. Cambridge: Cambridge University Press.
- LEE, B. M. (2016) Cultural Asset based Rehabilitation and Regional Development. Paper presented at 2016 International Conference on Innovation, Clusters & Economic Performance 7th July 2016. https://www.academia.edu/32386132/Cultural_Asset_based_Rehabilitation_and_Regional_Development
- MAYER, R. (2004) Should there be a three-strikes rule against pure discovery learning? *Am Psychol.* 59, 14–19.
- MCKENNEY, S. E., REEVES, T. C. (2012) *Conducting educational design research*. New York, NY: Routledge.
- MORGAN, L. (2010) Teacher professional transformation using learning by design: A case study. *E-Learning and Digital Media*, 7(3), 280–292.
- NLG. (1996) A pedagogy of multiliteracies: Designing social futures. *Harvard Educational Review*, 66(1), 60-92. NEW LONDON GROUP, NLG. 2000. *A Pedagogy of Multiliteracies: Designing Social*

- Futures. In *Multiliteracies: Literacy Learning and the Design of Social Futures*, B., Cope, and Kalantzis, M. Eds. Melbourne: Macmillan, 182-202.
- REDECKER, C. PUNIE, Y. (2020) Digital Competence Framework for Educators (DigCompEdu). JRC SCIENCE FOR POLICY REPORT.
- SAVVA, S. (2013) Museum-based Multiliteracies and Learning for 21st Century Skills: A Preliminary Study. *The International Journal of the Inclusive Museum*, 6(2), 117–130. doi:10.18848/1835-2014/CGP/v06i02/44444 2013
- SAVVA, S. (2016) The potential of a museum-school partnership to support diversity and multiliteracies-based pedagogy for the 21st century. Unpublished PhD thesis, University of Leicester, UK. 2016
- SAVVA, S. (2019a) Multiliteracies Dynamic Affinity Spaces: Analysing the Potential of a New Framework to Educate for Knowmad Society. In Moravec, J. (Ed.), *Emerging Education Futures*. Education Futures, US. 2019
- SAVVA, S. (2019b) Multiliteracies Performance Assessment Zones (MPAZ): A New Tool to Explore Multimodal Interactions for Virtual Learning. In K. Yang (Ed.), *Cases on Immersive Virtual Reality Techniques* (pp. 165-198). Hershey, PA: IGI Global. doi:10.4018/978-1-5225-5912-2.ch008. 2019
- YIN, R. K. (2012) *Applications of case study research* (3rd ed). Thousand Oaks, CA: Sage.

International cooperation for the digitization of cultural heritage: emerging models and the legacy of the lockdown

Elena Borin

CEREN, EA 7477 Burgundy School of Business, Université Bourgogne Franche Comté (France)
elena.borin@bsb-education.com

Federica Maietti

Department of Architecture, University of Ferrara (Italy)
federica.maietti@unife.it

Luca Rossato

Department of Architecture, University of Ferrara (Italy)
luca.rossato@unife.it

ABSTRACT

Although during the last thirty years there was an increasing demand for digitization of cultural heritage (Rossato, 2020), the process of digitization remains demanding (Evens and Hautekeete, 2011), since it requires not only significant financial investments but also specific competences, skills and software. Several cultural heritage institutions therefore prefer to outsource the digitization process: in countries that are still developing their digitization skills, often this outsourcing requires hiring companies and professionals at an international level. The covid-19 pandemic has highlighted that this model is inherently fragile, and that innovation is needed in the way international cooperation is implemented. This paper addresses this topic, by analyzing the best practices of two international projects of digitization of Brazilian cultural heritage and reflecting on how these two case studies could help us change the traditional approach to digitization in Global South countries.

Keywords:

Digitization of cultural heritage; International cooperation for cultural heritage; capacity building and knowledge transfer for cultural heritage

Introduction

Over the last decades, cultural institutions have placed increasing attention to the digitization of their cultural assets (Affleck et al., 2008), not only as a means for documentation, preservation and survey but also as a tool for increasing the communication and outreach potential of their cultural heritage (Bachi et al., 2014; Ciurea & Filip, 2016; Valtysson, 2017; Trapp et al., 2010).

The process of digitizing cultural heritage is however a challenging one (Evens & Hautekeete, 2011), requiring specific competences, skills and software that is usually expensive and complex to use. As a result, institutions are often unable to develop these skills internally and opt for outsourcing the digitization process. Professionals in the field, belonging to universities, research centers or specialized private companies, are therefore involved in the process either through research projects and other cooperation arrangements, such as public-private partnerships or through contractual agreements (Borin, 2017). Moreover, given their high degree of specialization, professionals are often recruited at an international level, especially in those countries that are still developing local competences in the field, such in the Global South. This makes the digitization process rather expensive: costs related to travel and accommodation add up to other expenses needed for the copyrighted software and training courses for local stakeholders.

Since the outbreak of the covid-19 pandemic however, this model was no longer viable. First, cultural heritage organizations could no longer afford digitization expenses, often due to the decrease of funds both as a result of the lack of ticketing revenues and scarcity of public funding that during the emergency were relocated to more pressing issues. Second, travel restrictions prevented international professionals from travelling. Third, training courses were temporarily infeasible due to social distancing measures.

Therefore, new processes for digitization of cultural heritage and data management needs to be experimented. Procedures, based on online processes and easier-to-use open-source software, could indeed ensure heritage digitization and data management notwithstanding the challenges of lockdown. According to these emerging models, documentation activities are done by local enterprises, under the supervision of international experts, not only empowering local actors, but also decreasing costs and increasing resilience.

Based on these considerations, this paper aims at reflecting on the following two research questions:

- What are the best practices emerging from these experiences?

- What are the lessons that could be taken as guidelines for a post-digitized, “blended” future?

The paper is divided into five sections. After this short introduction, in section one the authors summarize the main points of the theoretical debate on the above-mentioned topics. In section two, the research design and methodology are explained, detailing also the criteria of selection of the case study. Section three presents the two case studies in São Paulo (Brazil), the digital documentations of FAU USP - Faculty of Architecture of São Paulo University and *Casa de Vidro*, Lina Bo Bardi’s house (both carried out with the cooperation of the Getty Foundation). In section four, the authors discuss the lessons learned from the cases and draw some recommendation and guidelines for the future. The paper ends with some concluding remarks on section five.

Digitization for cultural heritage: theoretical approaches

Digitization and access technologies provide interesting opportunities for heritage institutions not only to reach out to different types of audience but also to facilitate access to artefacts and collections for research and exchanges purpose (Evens and Hautekeete, 2011). “By optimizing digital accessibility, the economic and societal values of heritage collections are created” (Evens and Hautekeete, 2011:157).

Since the 1970s, the cultural heritage sector has placed increasing attention to digitization technologies (Affleck et al., 2008), mainly as a means to enable access to their collections (van Horick, 2005). The digitization of cultural heritage was initially perceived mainly as a tool for documentation, preservation and research. The first catalogues date back to the 1970, while in the 1980s several museums converted printed source material into digital files (van Horick 2005). Several pioneering projects were launched, such as the “Optical Digital Image Storage System (ODISS) of the National Archives and Records Administration (NARA, 1991) in Washington which began in 1984 and used digital image and optical disk technologies for the reproduction and storage of archival documents (González 1992 and 1998). In the 1990s computational devices were more easily available to users, who showed increasing interest for digital contents (Naughton 2000). This speeded up experimentation by cultural heritage organizations, libraries, archives and museums that started to fully embrace digital technologies for learning, teaching and research purposes but also for documentation and public accountability (Kenney and Rieger, 2000). In the 1980s, digitization concerned mainly specific in-house material such as particular manuscripts, artefacts or rare objects with high scholarly value (Kiernan 1981, Kiernan 1991, Prescott 1997). In the 1990s, several cultural organizations introduced digitization at a larger scale (Peacock et al, 2004) also as a

response to policy initiative pushing for the digitization of cultural assets. For example, the initiative “Internet Library of Early Journals”, a joint project by the Universities of Birmingham, Leeds, Manchester and Oxford, digitized some 200,000 pages of 18th and 19th century journals (ILEJ, 1999): this was partially a response of the UK government’s Joint Information System’s Committee plan to encourage the creation of Electronic Libraries (or ELib) and made available resources, services and infrastructure to increase the use of digital content in Higher Education (Jisc 2010). In the early 2000s “a decade of digitization and documentation for the Web [...] created a rich array of cultural and historical information across the museum, library and archive sectors” (Peacock et al., 2004).

The act of digitization is based on capturing existing, analogue material and translating it in a digitized representation of the original object: in the 1990s, digitized material started to be placed side by side to “born digital” material to complement and enrich the existing information and data. Cultural heritage organization started to use interactive displaying, using reconstructive 3D modelling techniques and using the potentialities of WEB 1.0. In the early 2000s, multimedia tours supported by online virtual reality and 3D survey techniques, were increasingly common. More recently, the scenario evolved in the development of mobile applications, in the employment of 3D interpretative models and in using the potentialities of WEB 2.0 and 3.0 and semantic web (Rossato, 2020 – see figure 1).

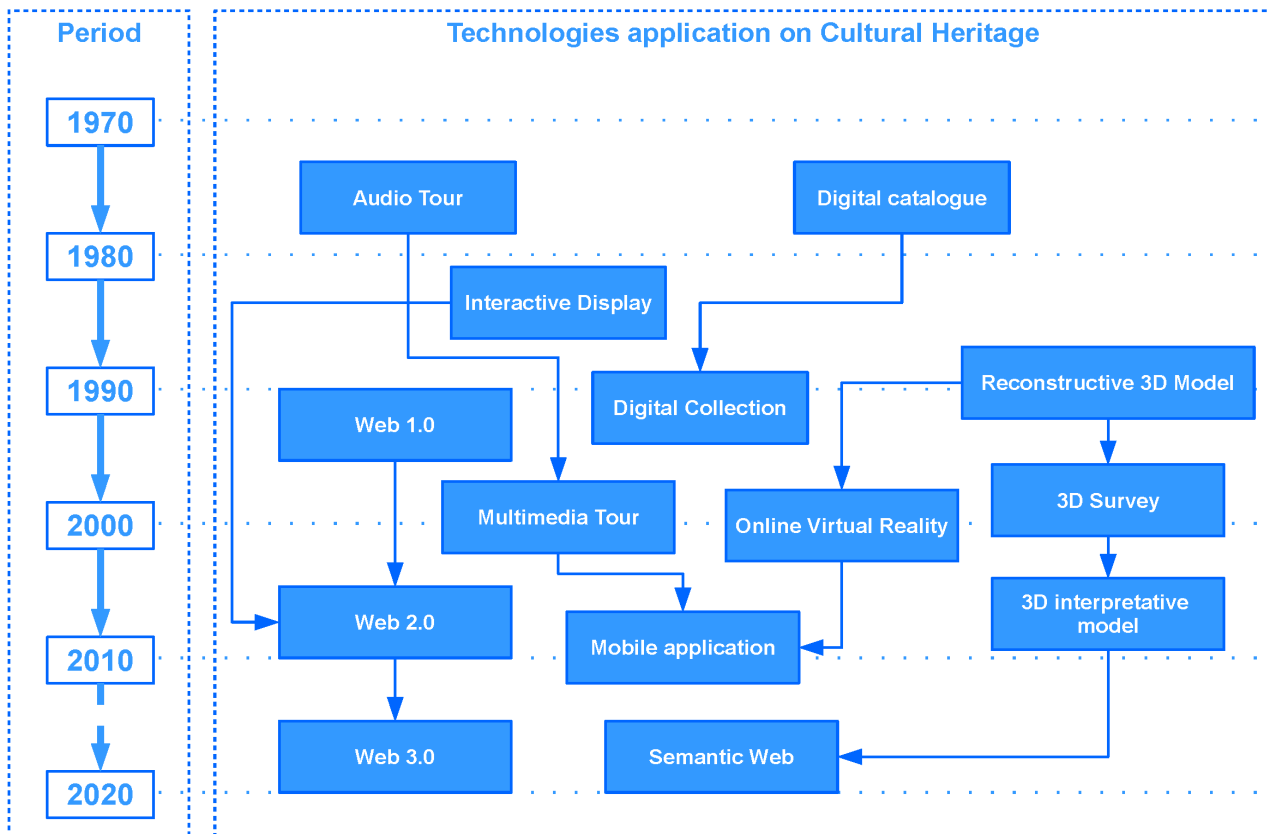


Figure 1 - Overview of the application of digital technologies to cultural heritage (Rossato, 2020)

Not only national and local cultural initiatives promoted digitization, but also international programs aimed at encouraging institutions to digitize their cultural heritage. In the European context, the Europeana initiative aimed at storing a mass of digital records of collections and making them available to anyone, fostering remote collaboration and wider access to artefacts. Thus, the European Commission's eContentplus Programme, which supported the creation of the Europeana portal, fostered the sharing of millions of digital resources from over 2000 European cultural organizations (museums, archives, libraries and audiovisual collections). In this case, digitization required a further effort: the project indeed demanded complying with specific standards, requirements and technologies that ensured that the digital outputs could be used in relation to the other Europeana partners.

As highlighted above, digitization has often a significant impact on management, especially at an international scale: it implied a clear vision and strategic thinking, project planning skills, knowledge of technology, availability of technological tools and therefore a careful organization of financial and

human resources. In the survey carried out in the framework of the project Enumerate³⁵, it emerged that almost 83% of the surveyed cultural heritage institutions in Europe were developing digitization activities, with a higher percentage of digitized contents among art museums and libraries. The least digitized formats were 3D objects (7%) as well as monuments and cultural heritage sites (8%), mainly due to the complexities in organizing the digitization process and the required investments (both temporal and financial). The survey also highlighted that 34% of institutions have a digitization strategy and 31% have developed specific policies for the use of their digital collections. Furthermore, the report underlined that digitization is usually resource intensive: the amount of staff involved in digitization processes varies from an average of 15 staff members involved for national libraries to 5.5 staff members in the majority of cultural heritage institutions. Even in smaller organizations, on average 3.3% of staff was dedicated to digitization. The costs of digitization projects on average varied from 40,000 € to 103,000 € per full time member of staff. The required funding for digitization was usually taken from internal budgets (87% of the sample), or from public grants (40%), while just 5% used private investments or had commercial sponsors (4%). The difficult financial sustainability often hinder efficient digitization processes: heritage institutions are thus often deterred by the high costs and the insufficient availability of funding for digitization or their time-limited nature (Lavoie and Dempsey, 2004; Navarette, 2009). This forces them to rethink their business models, with the dilemma of building digitization expertise in-house or outsourcing (Evens and Hauttekeete, 2011). Thus, heritage organization were increasingly embracing the creation of strategic partnerships for the implementation of activities that are not part of their core competencies. In digitization projects, operational partnerships are developed to generate managerial efficiency, economies of scale, as well as knowledge and innovation sharing. However, these collaborations are often temporarily limited and project-based, hindering the possibility to evolve in structural cooperation (Bishoff and Allen, 2004).

Frequently, as the level of required digitization competences and skills increases, professionals are even recruited at an international level, with public-private partnership or contractual agreements that aims at capturing international best practices for digitization (Borin, 2017) especially for cultural heritage organizations located in countries that are still developing digital technologies (Rossato, 2020). As a result, the costs related to travel and accommodation add up to other expenses needed for the copyrighted software and training courses for local stakeholders.

The outbreak of the covid-19 pandemic however, has deeply questioned this model. Although there was a strong request of digital contents (Agostino, Arnaboldi, & Lampis, 2020; Samaroudi, Echavarria, & Perry, 2020), the pandemic highlighted the weaknesses of digitization processes based on high costs, uncertain revenues and international outsourcing of digitization projects

³⁵ More information about the Enumerate project, as well as its main outputs are available at: <http://www.enumerate.eu>

based exclusively on on-site activities proved unsustainable. Country responses to the negative effects of the lockdown on the cultural and creative sector indeed generally focused on strengthening the local/national organizations and institutions with specific financial and policy measures without specifically encouraging international exchanges (Vallerand, 2020).

There is therefore the need to rethink processes of digitization of cultural heritage and data management in order to find new solutions to these temporary problems that could nevertheless lead to long-term, more sustainable models of innovation. These innovative models could be based on previous experience that have already been implemented over the last years in projects of international cooperation for cultural heritage digitization and reflecting on what are the best practices that we can take and use during these challenging times and in the future (Maietti et al., 2020). This paper aims at addressing this topic, focusing on the analysis of best practices implemented in two digitization projects in Brazil.

Research design and methodology

As explained above, this research is aimed at investigating international projects for digitization of cultural heritage, identifying their best practices in order to reflect on how to innovate international cooperation approaches in current times and in a post-digitized, “blended” future.

The authors decided to use a qualitative research approach, since it is considered the most appropriate to the complex nature of the topic of investigation and the necessity to explore it in depth: this approach was considered as particularly consistent with the objective of shedding light on how the research topics were manifesting (Denzin, Lincoln and Giardina, 2006). This research could be considered as a preliminary investigation of the research topics, since it focuses on projects which started before the pandemic and continued during the crisis period.

The case studies were selected to comply in particular with the principle of representativeness (Patton, 2002) of international cooperation projects for digitization of cultural heritage in Global South countries.

Brazil was selected as a research area for two main reasons: first of all, due to the reflection on the need for digitization of its cultural heritage that was felt by the local communities of experts and professionals over the last years, especially as a result of emergencies such as the fire of the National Museum in Rio de Janeiro in 2018 that was described as the worst loss of cultural heritage in the history of the country. Second, Brazil was one of the countries most severely hit by the pan-

democratic: this implied not only temporary isolation but also the need to find viable solutions given the rather scarce measures were taken for protecting its cultural and creative sector.

A preliminary mapping of potentially interesting case studies was made as preparation activity, focusing in particular on digitization project of architectural cultural heritage. Then two case studies were selected complying with two main criteria: the digitization project should concern the same architectural period, in order to face digitization projects that required similar skills and knowledge; second, the projects should have been carried out by a team of international experts working alongside local professionals; third, the project should have been multi-annual, implying that the international cooperation should have lasted for a sufficient time frame to evaluate its development.

Based on these criteria, two case studies were selected: the digitization of the *Casa de Vidro*, a modernist masterpiece by architect Lina Bo Bardi and the digitization of the building of the Faculty of Architecture of Sao Paulo University, the FAU USP, another modern masterpiece by João Batista Vilanova Artigas. The analysis of these case studies is presented in the following sections.

International digitization projects: some insights from the digital documentation of FAU USP and *Casa de Vidro*

As explained in the previous section, one of the main criteria of selection of the case studies was related to the belonging of the digitization project to the same architectural period, so that to make the analysis of the case studies more coherent and the results comparable. The selected period was the modernist one, given the peculiarities and diffusion of the movement in the Brazilian context.

The analysis of the case studies will therefore be preceded by a section dedicated to an overview of the modernist period and the problems related to its preservation, which aims to explain the context of the digitization projects.

Then the analysis of the two case studies will be carried out, focusing not only on an overview of the characteristics of the digitization project, but also to aspects related to its management and governance.

Modernism in Brazil: problems of preservation and the opportunities for international cooperation

Brazilian modernist architecture represents probably the highest expression of modern style in architecture in south America. In Brazil, after the visits of Le Corbusier during the thirties a new generation of architect started to design remarkable architectures by an elaboration of rationalism prin-

principles. The straight line became curved and organic and smooth shapes started to fill-up empty spaces in many Brazilian cities. Architectures by Oscar Niemeyer, Affonso Eduardo Reidy, Oscar Bratke, Lucio Costa, Lina Bo Bardi, Rino Levi and Joao Batista Vilanova Artigas, are still part of Brazilian cities' building stock and need to be preserved and enhanced to make them able to face this twenty-first century challenges.

However, currently the twentieth century architecture, due to a very quick deterioration process of its materials, is all over the world slowly modified in materials, volumes, colors or even demolished. Many of these architectures are still used for public purposes or as residential buildings but they usually are in bad conditions and their state of materials conservation is very poor. This is in part due to the vision that modern architecture did not qualify as art to be restored and included in the historically significant city.

Researchers and professionals concerned with the conservation of modern buildings frequently emphasize the need to accept change. This often sounds reasonable until the details of the proposed changes emerge. Modern buildings are at least as sensitive to apparently minor changes as those of earlier historic periods. The design of windows, for example, often is the architecture. Aspects that may be incidental in a Classical building may be central in a modern building. Furthermore these buildings for their concepts, shapes, materials, are perfect case studies to explore the integration of sustainable architecture and heritage conservation concepts, "The explosion of building technology starting in the late nineteenth century led to innovative building forms and construction materials that now pose new conservation challenges. This theme explored the approaches needed to advance the field in relation to environmental, technical, and physical conservation" (Normandin &, Macdonald, 2013: 3-4).

The existing twentieth century building stock has become particularly interesting due to the current crisis in the real estate industry and the market demand for energy quality, environmental sustainability and structural safety. In this field of application, restoration, which focuses on important heritage in terms of history, architecture, and landscape (whose enhancement to promote tourism and culture) may act as a powerful driving force to foster economic recovery and state-of-the-art competences.

Also, the renovation process, which highlights the need to change the direction of regeneration and transformation model adopted in the territory and the evolution of the construction industry could drive the future towards sustainable, inclusive, and shared actions.

Heritage professionals working on it do not always have enough scientific data on the nature and performance of the materials and systems to develop the necessary protocols for conservation

treatment. As a result, international cooperation networks are often set up to fully develop the potential of preservation of modern cultural heritage in the country. To address these challenges, the Getty Foundation in Los Angeles, USA, developed “Keeping It Modern” program, a grant initiative that continues the deep commitment of the institution to the conservation of historic buildings. “Keeping It Modern” supports grant projects of outstanding architectural significance that promise to advance conservation practices. In this framework the two case studies described in this contribution, the *Casa de Vidro* (by architect Lina Bo Bardi) and FAU USP building (By Joao Batista Vilanova Artigas) received a grant by the Getty Foundation initiative for the implementation of an effective conservation plan. The international cooperation net among the involved stakeholder and experts (coming from USA, Brazil and Italy) was the key factor for the success of all the activities.

The digitization of the Faculty of Architecture and Urban Planning Center, João Batista Vilanova Artigas and Carlos Cascaldi, 1969, São Paulo, Brazil

In the early 1960s the School of Architecture and Urbanism at the University of São Paulo turned to one of Brazil's most important modernist architects, João Batista Vilanova Artigas, to design a new faculty building in collaboration with Carlos Cascaldi. Taking their cues from the Brutalism of the late Le Corbusier, Artigas and Cascaldi created a monumental structure that emphasizes the elegance of modern materials such as concrete and glass with minimal decoration. One of the building's most prominent features is its dramatic roof, a large grid of skylights set into reinforced concrete that fills the courtyard below with natural light. While past repairs have been undertaken on a case-by-case basis, a more holistic approach was required to properly preserve the building.

In 2016, a conservation management plan was developed with the support from the Getty conservation institute to introduce a holistic approach to the maintenance of the building's key features based also on a digitization project as main output of the initiative. This methodological approach will then be integrated into the teaching curriculum as a tool to educate the next generation of Brazilian architects on the value of strategic planning for the conservation of historic sites.

The Getty institute granted consisted in \$200,000, with the specific final requirement to present a coherent conservation plan of the building.

The objectives were several: first of all, to document and analyse in depth, the transformations of the building, its use, the perception of its spatiality along time, also proposing future developments. This aimed not only at drawing some guidelines for the use and occupation of spaces, but also to set parameters for the necessary review of installations (electrical, air conditioning, etc.). The second objective was related to the monitoring of the waterproofing system and the development of a preventive maintenance program for the roof, in order to develop conservation and preventive

maintenance measures for the system. The third task was related to the investigation of the reinforced concrete blind to understand its composition and its conservation state.

These objectives required an in-depth survey carried out through a digitation process which consisted in a laser-scanning survey performed by an international group of experts, the team of the Integrated Automatic Procedures for Restoration of Monuments (DIAPReM), of Ferrara University Department of Architecture.

The Italian research laboratory integrated the competences and skills of several local institutes and technologies that included the Escola Politécnica da Universidade de São Paulo (that took care of the concrete porosimetry analysis), the Instituto de Pesquisas Tecnológicas do Estado de São Paulo (specialized in chemical analyses and materials resistance), as well as some private companies such as the Pires Giovanetti and Guardia architects (concrete cleaning testing), Podarte (arboreal survey), Polígono Arquitetura e Engenharia (study and application in place of finishing repair mortar), Relevô Topografia (metric survey) and SGS do Brasil (polyurea testing).

The cooperation was established developing the laser-scanning survey in 2016, allowing the international team to work alongside the local partners and carrying out also some training courses, that aimed at enabling them to use the outputs of the digitization both for architectural analysis and representations and for diagnostic purposes. Training was indeed focused on “navigation” and querying of the 3D models also through open source software, in order to facilitate a direct use and application of digital geometric data for several research purposes. An additional section of the knowledge transfer was aimed to train participants on the use of laser scanner data as a support for in-depth analysis of the state of conservation of external surfaces, and future monitoring.

These activities empowered the local stakeholders, that were then able to use the data collected through the laser scanning and use them in the following years. The results of the laser-scanner survey were then digitally shared among the various teams of the project as well as with the Getty institute, allowing exchange of reflections and information. In the following years, the international and local teams (especially the one of São Paulo University) continued exchanging and elaborating on the database by online exchanges that built upon the competences developed during the onsite activities. The use of open software was the key to facilitating this phase and was described by a member of DIAPReM as the key to sustain the long-term implementation of the project.

The digitization project of Casa de Vidro, Lina Bo Bardi, 1951, São Paulo, Brazil

Created as a personal residence for Lina Bo Bardi and her husband after emigrating from Italy to Brazil in 1946, the *Casa de Vidro* was Lina Bo Bardi's first completed work as an architect and as a new Brazilian citizen. *Casa de Vidro* demonstrates Bo Bardi's resourceful use of low-cost fabrication techniques and industrially produced materials, as well as her adaptation of European modernism to the natural settings and craft traditions of Brazil. Rooted to the earth with delicate posts, the main volume of the house floats graciously above the ground, maintaining a seamless relationship with the surrounding landscape through large panes of transparent, sliding glass. Since 1995 the *Casa de Vidro* has been under the stewardship of the Instituto Lina Bo e B.M. Bardi, which was established by the architect and her husband to display and promote Brazilian culture and arts.

In 2017, the Getty conservation institute issued a grant of \$195,000 to allow an international team of conservation architects, landscape conservation specialists, cultural heritage experts, and civil and structural engineers to develop a conservation management plan for the property. The project also included a 3D topographic survey of the site that allowed engineers to identify potentially harmful structural deformations at the smallest scale, not perceivable to the naked eye.

The *Casa de Vidro*'s 3D survey was carried out through a collaboration with the DIAPReM center at Ferrara University (Italy).

A preliminary digital documentation test of the *Casa* was carried out in 2016 by DIAPReM in cooperation with São Paulo University (especially with Instituto de Arquitetura e Urbanismo – IAU São Carlos – and Prof. Renato Anelli), the Instituto Lina Bo and P.M. Bardi (São Paulo) to verify the feasibility of a full survey on the building for its restoration and a potential placement of new architectures into the garden in order to create an archive-museum of the Lina Bo and P.M. Bardi Foundation.

The Getty Foundation grant then allowed a full 3D integrated survey and diagnostic projects in the framework of the “Keeping it Modern” initiative, that focused not only on the different architectural features but also the relationship between architecture and nature. Moreover, the 3D documentation activities and the point cloud processing allowed several analyses in a multidisciplinary framework. Due to overall complexity of the project, the survey included 3D laser scanner survey, topographic survey and on-site analysis and photographic documentation. The following analysis phase dealt with the topic of visual and analytical querying of the data.

Similarly to the FAU USP digitization project, also the *Casa de Vidro* digitization project was based on the cooperation between international and local partners, although at a smaller scale: the DIAPReM research center, University of Ferrara, Department of Architecture, the Instituto Lina Bo e P.M. Bardi (São Paulo, Brasil), the IAU - Instituto de Arquitetura e Urbanismo (São Carlos, Brazil)

and Leica Geosystem Brazil (Rio de Janeiro, San Carlos, São Paulo) which provided technical support. The cooperation aimed at coupling the competences of the Italian and Brazilian teams, with a clear focus on leaving the project coordination to local experts. As a result, the conservation plan project was headed by a Brazilian academic, while specific tasks were carried out by teams with two coordinators (one local and one international). For example, the digitization task has had two project coordinators, one from DIAPReM and one from the IAU, thus facilitating knowledge transfer between the international and local experts.

After and during the project, the essential activity was based on online data sharing: the 3D database created by the Italian partner was sent to the Brazilian teams and it was the basis for the creation of informative 3D models (BIM – Building Information Modelling) thus facilitating the use of the results of the project by the local stakeholders for both conservation and maintenance.

Moreover, several dissemination activities to increase awareness of this heritage building's importance in local stakeholders were launched, also at an international level.

Good practices from past projects to future developments

The analysis of the two case studies allows the authors to draw some preliminary reflections on the good practices implemented in those international cooperation projects.

In both cases, the international teams were asked to carry out the on-site work since their expertise was lacking at a local level, but their role was interpreted as a capacity building one, as testified by their working alongside the local partners particularly in the *Casa da Vidro* project or by the training activities organized in the framework of the FAU USP project. This good practice could be the starting point for continuing international cooperation but with a “lighter” approach: once local competences are developed, the international partner had acted as supervisor of following phases, working remotely since his presence onsite was no longer essential.

The second interesting point emerging from the case study analysis, is that the onsite phase was considered just a part of the project, while much of the work was done online: this was facilitated by the use of digital material, open software and sharing of data between the local and international experts involved.

Furthermore, dissemination was interpreted as a common activity, carried out independently by the local and international experts, who participated in several conferences, seminars and colloquia. This helped outreaching the results to a broader audience, both at the local and the international scale based on the different networks and contacts of the involved teams.

All these features could be a starting point for future scenarios, since they blend onsite cooperation and online activities building on the competences and contacts of both local and international project members.

Concluding remarks

The aim of this paper was to investigate best practices emerging from international projects of digitization of cultural heritage and how they can be used as lessons for creating guidelines for future scenarios.

The literature review highlighted that although there has been a growing demand for digitization over the last four decades, digitizing cultural contents is still challenging due to its still high costs and the need for specific software, knowledge and skills that are not always locally available, especially in Global South countries: this leads cultural heritage organization to outsource these projects, often to international experts. The COVID pandemic has highlighted that in those countries the crisis hit particularly hard the cultural and creative sector but very rarely measures were taken in order to support cultural heritage digitization. This posed further challenges for international projects of digitization, that were already costly and difficult before the pandemic-related restriction.

In order to find new models that could deal with these issues, the authors decided to reflect on the best practices of international digitization projects carried out before the pandemic time, in order to understand how these experiences could lead to guidelines for the lockdown and post-lockdown period. Two case studies of digitization of Brazilian modern heritage were selected: the FAU USP building and the *Casa da Vidro*.

The analysis highlighted that an initial onsite exchange between the international groups is at the basis of the development of digitization projects and that could be used as a training and capacity building tools to allow local partners to develop required specific skills. If remote work is planned from the beginning, after this initial onsite phase, the creation of digital shared databases and digital tools of project management could easily be employed as main work methods, reducing costs but not preventing the partners to effectively carry out the project together. This is also applied to the development of dissemination, awareness increasing and other outreach activities, that could be planned, coordinated and partially carried out online.

These results could lead us to draw some potential suggestions for the post-lockdown period. The “blended” model of implementation of the analyzed digitization project could indeed be successfully applied also in a post-pandemic scenario. Indeed, it not only encourage international experts to

empower local stakeholders with knowledge transfer and skills development in order to be able to work together with them in the following online phases of the project but also boosts online project implementation and data sharing reducing costs and time usually dedicated to travelling. Online coordination could also be a good method for planning dissemination and outreach activities in different geographical areas. Working from “home” also in international digitization projects could indeed be considered more sustainable in the long run and also potentially enabling cooperation that was previously hindered by lack of funding or distance.

The digital shift that was imposed during the lockdown paved the way for reflecting on these issues as a potential desirable scenario, highlighting the need to find more virtuous and efficient models of international cooperation. This crisis period could therefore be a good occasion for reflecting on previous good practices and using them both in the current situation and in a post-digitized, “blended” future.

In order to develop a more comprehensive analysis we consider essential to continue the research in the upcoming months and years to have a longer time-frame which includes at least a year after the end of the crisis, so that the longitudinal analysis could reflect on the use of models and best practices of international cooperation also after the end of the pandemic.

REFERENCES

- AFFLECK, J., & KVAN, T. (2008). A virtual community as the context for discursive interpretation: A role in cultural heritage engagement. *International Journal of Heritage Studies*, 14(3), 268-280.
- AGOSTINO, D., ARNABOLDI, M., & LAMPIS, A. (2020) Italian state museums during the COVID-19 crisis: from onsite closure to online openness. *Museum Management and Curatorship*, 35(4), 362-372.
- BACHI, V., FRESA, A., PIEROTTI, C., & PRANDONI, C. (2014) The digitization age: Mass culture is quality culture. Challenges for cultural heritage and society. In *Euro-Mediterranean Conference* (pp. 786-801). Springer, Cham.
- BISHOFF, L. AND ALLEN N (2004) *Business Planning for Cultural Heritage Institutions*. Washington, DC: Council on Library and Information Resources.
- BORIN, E. (2017) Public-private partnership in the cultural sector: a comparative analysis of European models. PIE Peter Lang, Brussels
- CAVALCANTI, L. (2003) *When Brazil Was Modern: A Guide to Architecture, 1928-1960*, Princeton Architectural Press, USA
- CIUREA, C., & FILIP, F. G. (2016) New researches on the role of virtual exhibitions in digitization, preservation and valorization of cultural heritage. *Informatica Economica*, 20(4), 26.
- DENZIN, N. K., LINCOLN, Y. S., & GIARDINA, M. D. (2006). Disciplining qualitative research. *International journal of qualitative studies in education*, 19(6), p. 769-782.

- EVENS, T., & HAUTTEKEETE, L. (2011). Challenges of digital preservation for cultural heritage institutions. *Journal of Librarianship and Information Science*, 43(3), 157-165.
- GONZÁLEZ, P. (1992) The Digital Processing of Images in Archive and Libraries, Large Scale International Projects. In Thaller, M. (ed.) (1992), *Images and Manuscripts in Historical Computing, Proceedings of a workshop at International University Institute, Firenze, November 15th 1991* (97- 120) Göttingen, Max Planck Institute.
- GONZÁLEZ, P. (1998) *Computerization of the Archivo General de Indias: Strategies and Results*. Council on Library and Information Resources, Pub.76.
<http://www.clir.org/pubs/reports/gonzalez/contents.html>
- KENNEY, A. R. & O. Y. REIGER (2000) *Moving Theory into Practice: digital imaging for libraries and archives*. Mountain View CA: Research Libraries Group.
- KIERNAN, K.S. (1981) *Beowulf' and the 'Beowulf' Manuscript*. New Brunswick, New Jersey: Rutgers University Press
- KIERNAN, K.S (1991) Digital Image Processing and the *Beowulf* manuscript. *Literary and Linguistic Computing* 6(1), 20-27 .
- ILEJ (1999) *What is ILEJ? Internet Library of Early Journals*. <http://www.bodley.ox.ac.uk/ilej/>.
- JISC (2010) Electronic Libraries programme (eLib).
<http://www.jisc.ac.uk/whatwedo/programmes/elib.aspx>
- LAVOIE, B. & DEMPSEY, L. (2004) Thirteen ways of looking at... digital preservation. *D-Lib Magazine* 10(7-8).
- LIAO, H. T., ZHAO, M., & SUN, S. P. (2020, May). A Literature Review of Museum and Heritage on Digitization, Digitalization, and Digital Transformation. In *6th International Conference on Humanities and Social Science Research (ICHSSR 2020)* (pp. 474-477). Atlantis Press.
- MACDONALD, S., NORMANDIN, K.C., KINDRED, B. (2007), *Conservation of Modern Architecture*. London: Routledge.
- MAIETTI, F., DI GIULIO, R., MEDICI, M., FERRARI, F., ZIRI, A. E., TURILLAZZI, B., & BONSMÀ, P. (2020). Documentation, Processing, and Representation of Architectural Heritage through 3D Semantic Modelling: The INCEPTION Project. In C. Bolognesi, & C. Santagati (Eds.), *Impact of Industry 4.0 on Architecture and Cultural Heritage* (pp. 202-238). Hershey, PA: IGI Global.
- MALDE, S., FINNIS, J., KENNEDY, A., RIDGE, M., VILLAESPESA, E., AND CHAN, S. (2013) "Let's Get Real 2". *Report from the second Culture24 Action Research Project. A journey towards understanding and measuring digital engagement*". Culture 24.
<http://weareculture24.org.uk/projects/action-research/>
- NARA (1991), *Digital Imaging and Optical Media Storage Systems: Guidelines for State and Local Government Agencies*. Washington D.C.:National Archives and Records Administration and National Association of Government Archives and Records Administrators.
- NAUGHTON, J. (2000) *A Brief History of the Future: Origins of the Internet*. London: Phoenix Press
- ROSSATO, L. (2020) *When Brazil and India were Modernist*. Maggioli Editore
- PATTON, M. Q. (2002) *Qualitative evaluation and research methods* (3rd ed.). Thousand Oaks, CA: Sage.
- PEACOCK, D., ELLIS, D., & DOOLAN, J. (2004) Searching For Meaning: Not Just Records. *Museums and the Web Conference 2004*, in Bearman, D. and Trant, J. (eds.) (2004), *Museums and the Web 2004: Proceedings*. Toronto: Archives & Museum Informatics

SAMAROUDI, M., ECHAVARRIA, K. R., & PERRY, L. (2020). Heritage in lockdown: digital provision of memory institutions in the UK and US of America during the COVID-19 pandemic. *Museum Management and Curatorship*, 1-25.

TRAPP, M., SEMMO, A., POKORSKI, R., HERRMANN, C. D., DÖLLNER, J., EICHHORN, M., & HEINZELMANN, M. (2010, November). Communication of digital cultural heritage in public spaces by the example of Roman cologne. In *Euro-Mediterranean Conference* (pp. 262-276). Springer, Berlin, Heidelberg.

VALLERAND, C (2020) *Culture in Crisis: Policy Guide for a Resilient Creative Sector*. UNESCO

VALTYSSON, B. (2017). From policy to platform: the digitization of Danish Cultural Heritage. *International Journal of Cultural Policy*, 23(5), 545-561.

VAN HORIK, R. (2005) *Permanent Pixels: Building blocks for the longevity of digital surrogates of historical photographs*. The Hague: DANS Studies in Digital Archiving

Cultural Equality in Museum Education: A Case Study of “Art For All”

Sih-Ying, Hsieh

ABSTRACT

In this paper, the author depicts the development of relevant public policies in various countries and compares them to the cultural policies in Taiwan. The author applied the methods of participant observation and interviews to ascertain the scope of integrated education in the post-digital world. The goal of this research is to improve *Art For All* by collecting user experience feedback and reflecting on social media activity. The researcher interviewed sighted people, visually impaired people, volunteers, and experts to build a more detailed museum education framework. The three key results of this study may be used to advance technological applications and future public policies. First, people are more able to access and use all the full extent of audio guides with their smartphones than through guide devices. Second, interactions on the platform narrowed the experiential gap between sighted people and visually challenged people. Third, the most effective means by which to propagate the idea of cultural equality to the public is to establish friendly, free, unbiased cultural environments that integrate virtual and offline experiences.

Keywords:

Cultural equality
Museum education
Museum technology
Services for visually impaired people
Art for all

1. Initial Considerations

Cultural equality has become critical across professional fields. For example, in the media industry, Netflix provides an audio description function for visually impaired people. When Netflix launched this tool, some users realized the need for extra support for disadvantaged groups. Ideally, governments and nongovernmental organizations should provide these social benefits. Cultural equality is a basic human right, and its actualization in certain developed countries reflects the progress of these societies.

The paper considers museums that have tried to design accessible resources for groups of different ages and abilities. The author poses three main points of analysis: First, government efficacy in enacting cultural policies; second, the practical extent to which minority groups were able to access and use special services; and third, policy improvements that may further promote connections in multicultural environments.

2. Cultural equality around the world

Cultural production and consumption is inextricable from social factors such as accumulation of cultural stock and differences in cultural values. Inequalities stem from imbalances in these social factors. The concept of cultural equality, which began gaining traction in the 1980s, stipulates that all people deserve equal treatment, regardless of race, social class, or identity. Over the past 40 years, museums have become symbols of this ideal. Basic culture laws around the world reflect the movement to close gaps of gender, nationality, and physical situation. In 2003, UNESCO implemented a plan for realizing cultural equality. One of the plan's key measures is to generate the necessary technological conditions and infrastructure to ensure equal opportunities to produce, disseminate, and access cultural goods and services. Under this plan, cultural organizations and museums have implemented new measures to increase the accessibility of their services, especially for people with limited sight or hearing.

3. Cultural Equality Policy in Taiwan

In 2012, Taiwan's Minister of Culture, Li-Chun Cheng, presented her policy-making blueprint. One of the main goals was to realize a healthy, equitable cultural environment for all people. Equity policy aims to minimize the cultural gap between social units. To achieve this goal, the Ministry of Culture announced several strategies, including subsidies for private organizations and local governments to participate in multicultural events, development of art accessibility policies to support museums and art centers, and research into cultural diversity to inform policy evaluation. The cultural

affairs committee comprises six departments: Cultural Facilities, Performance and Exhibition Planning, Publication and Reading Promotions, Television and Movie Marketing, Information and Data Services, and Legal Affairs. This division of responsibilities facilitates the Ministry of Culture's assessments of policy performance on the ground.

However, to review the policy-making division in cultural affairs, it is visible that the government did not have systematic research for different disabled people and other disadvantaged groups. In a welfare state, the Culture Basic Laws should be put in priority in order to promote international image for other countries. Nevertheless, in the case of Art For All, the author has reflections on human rights and the goal of museum education.

In short, the review of cultural policies in Taiwan gives an overview of the advocacy in cultural equality but still few practical cases are seen to the public. Since 2018, the National Culture and Arts Foundation annually supports 5 to 6 organizations for doing their Inclusive Art projects. Those project members are prone to collaborate with hospitals, communities, long-term care centers and NGOs to surmount the cultural differences, establishing ties with the public and mental disease patients, immigrants, or elderly people.

4. Audio Guides in the Museum Experience

Most public museums provide audio guide devices for visitors; however, not every audience is suitable for the audio content and understands those audio guides easily. Museums as accessible places and friendly environments to accept multiple ethics and cultures, shows the great potential in social responsibilities. In Taiwan, curators even serve for the special group, visually impaired people, supporting them to improve the understanding of cultural contents, like the color, shape and texture by "Audio Description".

Unlike the use for movies, Audio Description in museum study is more delicate; for instance, the audio description needs further information to help visually-challenged visitors to experience visual expressions with their hearings and imagination inside the museum galleries. Therefore, most of the Public Museums provide assistance in different aspects.

In the infrastructure aspect, navigation for visually-challenged groups is never an easy task. It should serve barrier-free facilities, avoiding narrow and unexpected routes. Through beacon technology, the current museum uses it as a play audio guide. It will play audio automatically when

people pass by the artworks. Museums also provide touch maps to help visually impaired people to find their ways to explore the galleries.

Besides the guide device or online audio files, the museum volunteers play an important role, who leads the audience to understand the exhibition discourse, comment on different viewpoints by discussion. Some technology applications are more likely to gather more online audiences, but just few people participate in phone apps for a long time. Compared to online applications, guided service, museums also provide teaching aids. Such as the National Palace Museum design tactile aids for blind people may easily get the artworks' appearance by sense of touch and hearing. National Taiwan Museum of Fine Arts curated a barrier-free exhibition " Home & House Cultural Accessibility Exploration Area for All " for disabled, blind, deaf audience, which set up small touchable models, sign language guide online and bigger-fonts exhibition display.



Picture 1: Southern Branch of National Palace Museum provides tactile map



Picture 2: tactile aid for blind people in Southern Branch of National Palace Museum

5. Digital Application: How "Art For All" makes the visual world accessible to blind people

"Art For All" is an online resources platform, which is developed by young members including artists, museum researchers, engineers, user experience and interface designers in 2020. The development team focuses on museum inclusive education and hopes to reverse the stereotype of museum visiting. All people have equal opportunity to enter the cultural institution to learn diverse perspectives by their own. Museums as an essential social learning center in every city, it should offer an open, friendly and inclusive environment for any kinds of visitors.

"Art For All" also applied in mobile apps which museums can use to make audio data available to blind and partially sighted people. With access to these audio materials, sight-impaired guests can experience self-guided tours; the audio materials play automatically when the guests pass corresponding artworks. In this model, museum volunteers are invited to join a helper team, which guides visually impaired people through an online call system. These tools enable any guest to explore galleries by sound and thereby gather more in-depth information. Platform users can leave comments that may be played when other people visit specific items.

Art for All is a long-term project, for several stages. First of all, develop and finish the concept of the product by Oct. 2020. In the second stage, starting from 2021, the development team will make sure the accessibility of museum practice. In stage 3, gathering the whole networking in using Art For All in all museums in Taiwan is the core achievement. Through systematic planning, combining

theoretical experiment with make-and-do practice, the members of Art For All project are hoping that the advocacy in cultural equality could be seen for public.

5.1 Prioritizing audience experience

When visitors come to the museum, they need to know more about the artworks, but most of them are still objects, that means the audio guide will be the top choice for the audience. One of the difficulties of using an audio guide might lose the autonomy of exploring the museum by visitors themselves when the content of the audio guide is designed for a public version and standard route schedule. It is tempting to think, if museums have an audience-oriented guide service, chances are that it may help museum visitors create their own museum experience, participate in deeper understanding about exhibition and enjoy in the service that combines both the digital and non-digital within the physical space of the Museum.

However, for partially sighted or blind people, audio guides could be more helpful by learning from audio description. The concepts of accessibility interface design and the international web accessibility policies are also concerned by the development team. In the Art For All project, the author as researcher and participants as well, attended the interview and testing process. The functions on the Art For All platform for instance, makes museums can upload their audio files and serve the blind/ partially sighted people experiencing friendly self-guided tours. Furthermore, with the Beacon technology installed inside the exhibition space, the audios on the platform would play automatically when they pass by artworks.

Meanwhile, the author as the member of the development team, draws on the guided usability testing to modify the user experience while using Art For All and confirm the feasibility for the following testing stage. In this research, the author interviewed visually-challenged people that their sight levels are different, some partially-sighted through one eye, some can only see light bots, some live in the dark. They work as students, special education teachers, museum employees and so on. The author discovered some insights from the interviews and gave feedback to the development team for further product research.

"We hope to go out and visit the real museum, just like sighted people, instead of viewing the textbook.", special school teaching intern.

In the past museum or disability rights filed paper, the researchers are prone to emphasize on the model of how to improve the understanding of the artworks or exhibition context and neglect the

real participation part; however, blind people have a strong motivation to explore the world. They are eager to self-learn, feel the space and the art atmosphere that those senses are hard to translate by any media. The development of the Art For All project is an organic, transformative, sustainable process, because it concerns the inclusive education needed by taking actions to help the public know more about blind people.



Picture 3: visually impaired student touches the sculpture to feel the shape and texture

When doing this research, the author gradually realized the difficulties of advocating the art equality issue. For one thing, few sighted people know what is the audio description, and how to use audio description in museum experience to service more visually impaired people. Another interviewee mentioned about their limited visiting experience in museum:

"I've never been to a museum by myself. I think it is a great place to learn culture related knowledge. But the last time I visited was on my school field trip when I was 15. I've never been museums alone and have no idea about audio description could be apply to the audio guide device, generally we visited museum, the first impression come to my mind is a group guide by curators, teachers and classmates are all with me just like attending a sight-seeing tour.", Mr. Wu, education theory master degree student.

The reason why visually impaired people have less opportunity to enter museums is based on their education background. Typically, in special school, compared to the amount of other dominant

subject professional teachers, it might have just one or no any art professional teacher at school. Lack of attending cultural events in the school education system becomes the weakness of promoting museum education programs.

According to the research discoveries above, the strategies of Art For All project is going to solve 3 main problems:

1. Audience-oriented service design: to reform the whole museum visiting experience combined with the audio description resources on Art For All platform
2. All the functions develop based on audience habit: evaluate the autonomy, self-learning need.
3. Set up an inclusive education networking: to connect the school and museum education to make it accessible.

5.2 Volunteer system integration

In the Art For All project, the author still wonders how the development team cooperates with different museums through an online platform. The main users on the platform could be museums, visually impaired people and the public. For the museum aspect, it is more likely to need more collaborators to join, in order to import the Art For All platform to the museum education program. Museum volunteers are composed of retired people, especially for educational related workers. Different museums have different team structures. When visiting the museums, the museum volunteers play an unforgettable role. They provide kind direction guide, receipt in the galleries and help with the workshop, talk or other educational events. In the Art For All project, team members invited them to join helping introduce and guide exhibitions by uploading their verbal, audio recording. Most of the scheduled group guided tours are responsible for more experienced volunteers, but every tour was live and left nothing recorded after events.

Also, museum volunteers are invited to join the Helper Team to guide by online calls for visually impaired people. This testing stage is ongoing. But with digital support, more participants' participation will bring the meaningful establishment of cultural citizenship.

5.3 Database sharing among museums

Nowadays, the collection and research centers in museums manage collections and archives in a digital collection database. However, most of them are not open to the public and limited for museum staff. Besides, every museum's collections are restricted in their own database. Which means

that the audience is not able to view and access the archive at one time; in other words, a cooperation alliance does not exist. Therefore, Art For All as a platform, connecting to different databases that design for museum users, viewers are more likely to have sufficient resources. Because the amount of audio description is less than we expected, only 6.4% museums in Taiwan serve barrier-free and audio description service, visually-challenged people find it hard to obtain audio files that are friendly enough for them.

When more and more collections are uploaded to digital databases, the online interaction would be a trend for the future. It is said that cultural citizenship means to empower the citizens, have opportunities for participating in public affairs. To respect different perspectives and show respect to others, trying to create personal comments with an open mind. Art For All provides customized, active and creative learning mode that people may add tracks/ works in playlists and collection folders on websites, such as managing an online gallery by their own. Except for personal settings, people may engage in the feedback function on the platform, aiming to attract more audiences to attend this unique visiting experience. Furthermore, sighted people may explore galleries by Sound Travel Mode, which offer people to follow the audio description files to enjoy visiting tours. Users on the platform are allowed to leave comments with their sentences and recordings which will be played simultaneously when people visit specific items. That is, with a concept of interlibrary collaboration, Art For All is going to build up a powerful online shared platform in order to access enough audio resources, provide friendly user journeys and exchange the comments from others.

6. Promoting and Realizing Integrated Education

In this essay, the author applies participant observation and interviews to conduct the scope of integrated education in the post-digital world. Researchers as participants who are prone to upgrade functions on Art For All by collecting feedback of user experience, reflect on the connections of people on social media.

6.1 Field Research: art-making with visually challenged students

In this essay, the author participates in developing the Art For All platform and plans for the education program for the following practice part in museums. The Tian-Sheng Pu Sculpture Memorial Museum (T.S.P Museum) is known as a pioneer in the inclusive art field. From 2003, T.S.P Museum started to invite visually impaired students of Taipei School For The Visually Impaired to the museum for participating in sculpture-making workshops, attending the art talk and experiencing the artworks context by their tactile sensation. For more than 10-year teaching experience, the director of T.S.P Museum, Hao-Chi Pu, is an art lecturer in special school but also the third son of

artist Tian-Sheng Pu. In the Art For All project, director Pu is the consultant and the collaborator for the audio description developing. The author will show the fieldwork perspective and try to give suggestions on the practical work in museums.



Picture 4: Director of T.S.P museum introduce the curating and space in the exhibition

6.2 Socially engaged art

British scholar Clair Bishop defines Socially engaged art as an art in the social practice perspective that makes the relationship between artists and participants become an equal, collaborative, multi-cultural partnership. In other words, the model of the art process totally transforms the modern art in which the role of the artist is in the dominant position into participatory art. As the German artist Joseph Beuys said, everyone can be artists. The spirit of Socially-Engaged Art emphasizes the social function and its effects, and how to discourse the core issue that the artist is going to solve in this kind of art project.

T.S.P Museum provides visually impaired visitors to attend the sculpture workshop, aiming to help them realize the art context while they learn to make clay as a model. Also, the visually challenged people are more sensitive to their hearing and tactile, so it would be great for them to explore the shape, texture, temperature, size and so on by their hands. One student shared his thoughts when taking clay workshop:

"It is so fun. I have no idea how to make it on my own. I just listened to how my classmates and teacher described my appearance. I do really imagine my portrait in my mind, and then I create my portrait sculpture by my own"

A visually impaired person may appreciate artwork by their feelings, imagination and logic because art appreciation is a long process with learning and study. A volunteer beside students shared that:

"In a moment, I tried to keep silent. I am afraid of giving too many instructions that would influence kids' creativity. "

In the workshop, all the participants are allowed to comment on their views. Some kids are assisted by volunteers, teachers and curators as well, when their sight situation is almost blind and hard to distinguish visible objects. However, the help from volunteers sometimes causes stress for kids, which disturbs the expression of their personality and emotions. The curator reminds kids to consider their sculpture work as a mirror, every action on the clay will leave a record, and also the thoughts can be expressed by tactile sensation.



Picture 5: Visually impaired student made portrait sculpture with volunteers beside

6.3 Public feedback and consciousness of difference

In May, 2020, Art For All members started to cooperate with the T.S.P Museum given that most of the tactile educational events take place here and other related study material needs field research to catch up theoretical research. According to what the author mentioned above, the Art For All Project crosses the border of integrated education and digitalization strategy in museum education. Thus, how people use online platforms with the visiting tour in the museum is an essential part. The researcher interviewed users who are sighted people, visually impaired people, volunteers and

experts in order to know more details in the museum education framework. The discoveries are inspiring for the technology application and future public policies, including 3 key results below.

First, people are easier to access the audio guide with their smartphones and enjoy abundant resources. Consider the information accessibility, people tend to use their phones instead of guided devices. Art For All has been an online curation system, people may use it without time and space limitation. A special school student comment on the product testing, he mentioned:

"I thought Art For All is a database only, and its interface is similar to the music playlist, I have chances to listen to it anytime, anywhere. But the function is friendly and has an interactive part for the public. It makes me want to invite friends to join my museum trip next time. "

However, not every digital technology is satisfied by everyone. Some museums think an interactive function on a platform may have management considerations, such as to filter inappropriate comments. Some audiences prefer to browse the information on the computer. Art For All platform for now is still keeping moderate for the better performance such as creating new user journeys and increasing the amount of users.



Picture 6: audience used Art For All when visiting museum

Second, the interaction on the platform shortens the distance of sighted people and visual-challenged people, which means to improve fair understanding of different groups. The situation of using Art For All could be like this: people take out their phones, choose the specific exhibition, walk into the galleries for the exhibition, listen to the audio descriptions for guiding, and then comment on what they saw or anything. Users on Art For All platform are easily able to view other's comments and reply for the feedback for the same time. If visually-challenged people record his/

her recording, it will upload to the platform simultaneously. After using platform and attend the project, the user thought it minimize the gap with the subordinate group:

"I don't have experience of talking to blind people. I learned the image of blind people from what people defined; for example, they are sensitive to sounds, good memories, homebody and so on. After using Art For All, I found there is not much difference between them and me. "

The last but not least, the best way to urge cultural equality to the public is to build up a friendly, free and unbiased environment through the integration of virtual and offline promotion. Either the sculpture workshop or the digital participation in Art For All, if more people gather together and are aware of the cultural rights, it would be much helpful for people to stand out for equality issues. When virtual networking becomes possible, an audience who is interested in inclusive education will be seen. To develop an environment needs to take action for the following changes. Only when the museum alliance is established for sustainable development, the hopeful policy-making and the law amendment would happen in the near future.

7. Research limitations

In the Art For All project, the product itself is an online platform; however, the research and other educational events coexist. The reason why some analysis in this essay did not divide these two kinds of practice into two parts is that At For All should be viewed as a whole program that all the project members aim to realize the concept of cultural equality.

This research is not a dominant topic in the museum field, therefore it is difficult to receive previous study to take a look with how visually impaired audiences attend the cultural events. In this essay, the author's theoretical approach is based on the discovery and participation in the case "Art For All" project. Before the survey and interview, the author just knew little about the real thoughts from the perspective of blind people. The author found the development team did product testing step by step in order to meet audience expectations. While doing this study, the author figure out an astonishing truth that the art education for visually-impaired people are rare and lack of systematic program, few blind people has been participate the art events or visit museums in person; that is, because of the lack of the initial research, the prototype of Art For All are based on few real experiences. Therefore, the viewpoints in this essay might be a close look of the frontline education sharing but there is a gap between the theoretical application and practice in scale development.

8. Conclusion: Embracing a Multifaceted Cultural Approach

In this essay, the author depicts the outline of equality in culture affairs and gives the feedback from the field research. Art For All as a case study, its project scale covered digital technology, integrated education and museum education. Through cooperating with the private museum, for example T.S.P Memorial Museum, the development team members tried to combine the existing tactile art education programs in the museum and the digital online platform application. It shows the essential part for advocate culture citizenship is participation. When people actively attend and enjoy the activities, willing to share their ideas with different groups, trying to understand and paying respectful attitude for cultural difference, the inclusive, friendly and equal environment will come true.

In conclusion, integrated education is never easy because it takes a long time to communicate with the public to cherish cultural diversity we own, by utilizing technologic methods in museums to realize the freedom of participation. Though Culture Basic Laws are still in discussion in this rapid changing time, to support the creative, new technology as a means to universalize access and participation for all is the vision in the 2020s.

REFERENCES

- Anderson, E. (1999). 'What Is the Point of Equality', *Ethics* 109: 287–337.
- Aoki, P. M., R. E. Grinter, A. Hurst, M. H. Szymanski, J. D. Thornton and A. Woodruff (2002). *Sotto Voce: Exploring the Interplay of Conversation and Mobile Audio Spaces*. Chi 2002, Minneapolis, ACM-Press.
- Callanan, M. A., J. L. Jipson and M. Stampf Soennichsen (2002). 'Maps, Globes, and Videos: Parent-Child Conversations about Representational Objects'. *Perspectives on Object-Centered Learning in Museums*. S. Paris. Mahwah, NJ, Lawrence Earlbaum Associates: 261-283.
- Johnston, D. (1995). 'Native Rights as Collective Rights: A Question of Group Preservation', in W. Kymlicka (ed.) *The Rights of Minority Cultures*, pp. 179–201. Oxford: Oxford University Press.
- Klein M., Mogles N. and van Wissen A. (2014). 'Intelligent mobile support for therapy adherence and behavior change'. *Journal of Biomedical Informatics*. 51, 137-151
- Parekh, B. (2000). *Rethinking Multiculturalism: Cultural Diversity and Political Theory*. London: Macmillan.
- Pierik, R. (2004). 'Conceptualizing Cultural Groups and Cultural Difference: The Social Mechanism-Approach', *Ethnicities* 4(4): 523–44.
- Will Kymlicka(1995). *Multicultural Citizenship: Liberal Theory of Minority Right*, Oxford, UK: ClarendonPress, 1995).
- UNESCO(2003) 'National Plan of Cultural Equality', UNESCO Diversity of cultural expressions. <https://en.unesco.org/creativity/policy-monitoring-platform/national-plan-cultural-equality>

National Taiwan Museum of Fine Arts(2019) Home & House Cultural Accessibility Exploration Area for All, Official Website.

https://event.culture.tw/NTMOFA/portal/Registration/C0103MAction?useLanguage=tw&actId=90113&request_locale=tw

'A new look at an old friend: Reevaluating the Met's audio-guide service', *MW2015: Museums and the Web 2015*. Published February 1, 2015. Consulted October 27, 2020.

<https://mw2015.museumsandtheweb.com/paper/a-new-look-at-an-old-friend-re-evaluating-the-mets-audio-guide-service/>

Rosaldo, R. (1994). 'Cultural Citizenship in San Jose', California. *PoLAR: Political and legal anthropology review* 17.2 (1994): 57-64.

Ong, A. et al. (1996). Cultural citizenship as subject-making: immigrants negotiate racial and cultural boundaries in the United States [and comments and reply]. *Current anthropology* (1996): 737-762.

Using Podcasts to Enhance Student Learning Inside & Outside the Classroom

Dr. Xela Batchelder

Waynesburg University, USA
xbatchel@waynesbug.edu

Thomas Karr, MFA

Wayne State University, USA
thomas.karr@wayne.edu

Dr. Brett Ashley Crawford

Carnegie Mellon University
brett@cmu.edu

Brenda Lee Johnston, MAM

Butler University, USA
bljohnst@butler.edu

Dr. Amy Shimshon-Santo

Claremont Graduate University, USA
amy.shimshon-santo@cgu.edu

ABSTRACT

The use of podcasts in arts management curricula is one of the latest ways to connect students with a variety of information, a diversity of voices, and support the development of their own voice. Podcasts allow for increased student engagement both inside and outside the classroom. Podcasts provide equity among students who are differently-abled and of different socio-economic statuses. The creation of original podcasts provides new ways for students to demonstrate their understanding of material, develop important skills, and work with their classmates and the world in new and exciting ways. This paper shares six case studies that demonstrate the successful use of podcasts in various classroom settings, as well as the pedagogical research to support why their use is important and relevant in the development of tomorrow's arts leaders.

Keywords:

Podcasts
Pedagogy
Equity
Accessibility

Introduction

As technology evolves and the society we live in changes, so do the approaches to teaching and the curricula used in higher education courses. Arts administration is by no means immune to these evolving technologies and societal advances. One way to include new technologies, as well as more diverse and a greater number of voices in our curriculum, is through the use of podcasts. Podcasts are a relatively new tool that increase student engagement and equity in the classroom. They can be used as educational tools to deepen students' understanding of current topics and issues related to the field of arts management, and they do so in a much more affordable manner than textbooks. The ability to listen to podcasts makes them a desirable way for students to engage with material, especially for those who are differently abled and for whom reading may be a challenge. Podcasts also allow educators to incorporate current events and the latest practices into curricula. Teaching students to develop their own podcasts increases their knowledge and practical skills as they learn the software used to record, edit, and share podcasts. Podcast creation involves teamwork, the creative process, and the use of several hard and soft skills. These skills are attractive to employers, and thus the inclusion of podcast development in curricula increases students' appeal to potential employers. For these reasons and more, which will be discussed throughout this paper, podcasts are an effective and desirable way to achieve several pedagogical goals. This paper includes information about what a podcast is, details about the history of podcasts, and their place in pedagogy. The paper then shares several case studies from the authors' personal experiences using podcasts in their courses, before summarizing the impact and importance of podcasts in pedagogy.

What is a podcast / History and Data establishing

Podcasts have proven to be a useful tool for student learning. One of the main benefits is their appeal to digital natives (Prensky, 2001). Although podcasts can support a more Universal Course Design, providing more opportunity for those students who learn better through auditory means, they are also an auditory-dependent pathway, perhaps making learning more difficult for students with hearing impairments. So, it is recommended that all podcast content (for class work or otherwise) be transcribed for the web with standard podcast syndication.

What is a podcast?

A podcast is a digital audio file made available on the internet for downloading to a computer or mobile device and listened to using an audio player. The technology driving the content to the device is an early internet tool: an RSS feed. "RSS stands for Really Simple Syndication and it is a simple, standardized content distribution method that can help you stay up-to-date with your favor-

ite newscasts, blogs, websites, and social media channels.” (Teske, 2020). The RSS feed works with an aggregator, such as iTunes or Spotify, and automatically updates the aggregator with new content from the original source.

The term “podcast” came from a combination of two technologies: the early Apple iPod portable audio player and the concept of broadcasting like a radio broadcast. The RSS provides the broadcast side of the equation, while anyone could offer a feed if they had the audio file appropriately formatted and linked.

If you are not a podcast listener, it is important to take a moment to explore the breadth of types of content available through typical podcast feeds. Perhaps the most well-known, and definitely most followed, are podcasts of nonfiction narrative storytelling best exemplified by “This American Life”. The nonfiction narrative storytelling example that brought podcasting to the masses was NPR’s “Serial”, a headliner detective story investigating a botched investigation into a murder in Baltimore (first season). NPR, in fact, is one of the leaders for podcast listenership, including interviews, news shows, and concerts (Podtrac, 2020). Podcasts are also used for fiction akin to serialized audio books. Another popular content type is deep-dive journalism, from the *New York Times* “The Daily” to the scientific molecular analysis content in “This Podcast Will Kill You”. Essentially, much like the internet, there are podcasts for all interests and all purposes.

Why podcasts?

For those who are convinced that “podcasting is a fad or a trend”, data reveals that it is actually a mode of communication that is still growing. It is likely that if asked, most students in a classroom today have heard of and are following one or more podcasts.

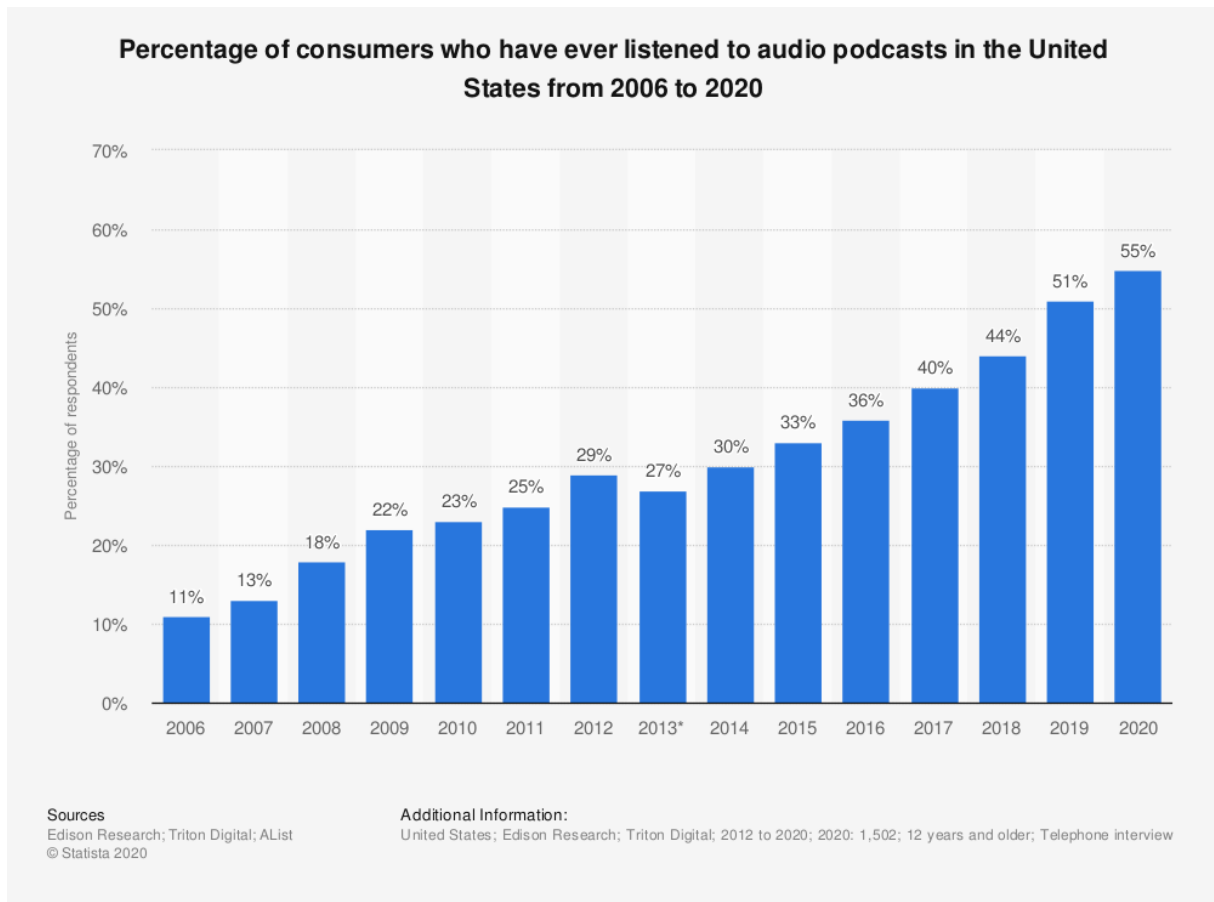


FIGURE 1. LISTENERSHIP YEAR OVER YEAR. Source: "Podcasting in the U.S.," Statista, 2020.

The first "year of the podcast" was 2005. Two thousand fourteen and then again 2017 were also heralded as "the year of the podcast". The *Chronicle of Higher Education* noted 2019 as the "Year of the Podcast in Higher Education". But, as is demonstrated in Figure 1, listenership continues to grow. The pandemic has only accelerated this trend. Why is podcasting a preferred means of consuming ideas, stories, and other content? In many ways, podcasts are an outgrowth of contemporary life: podcasts are easy, mobile, and personalized: the trifecta of modern life. If that answers the practical motivation, it still does not answer the deeper "why". Research into audiences reveals that the number one reason to listen to a podcast is to learn something new, which aligns well for using podcasting as a pedagogical tool.

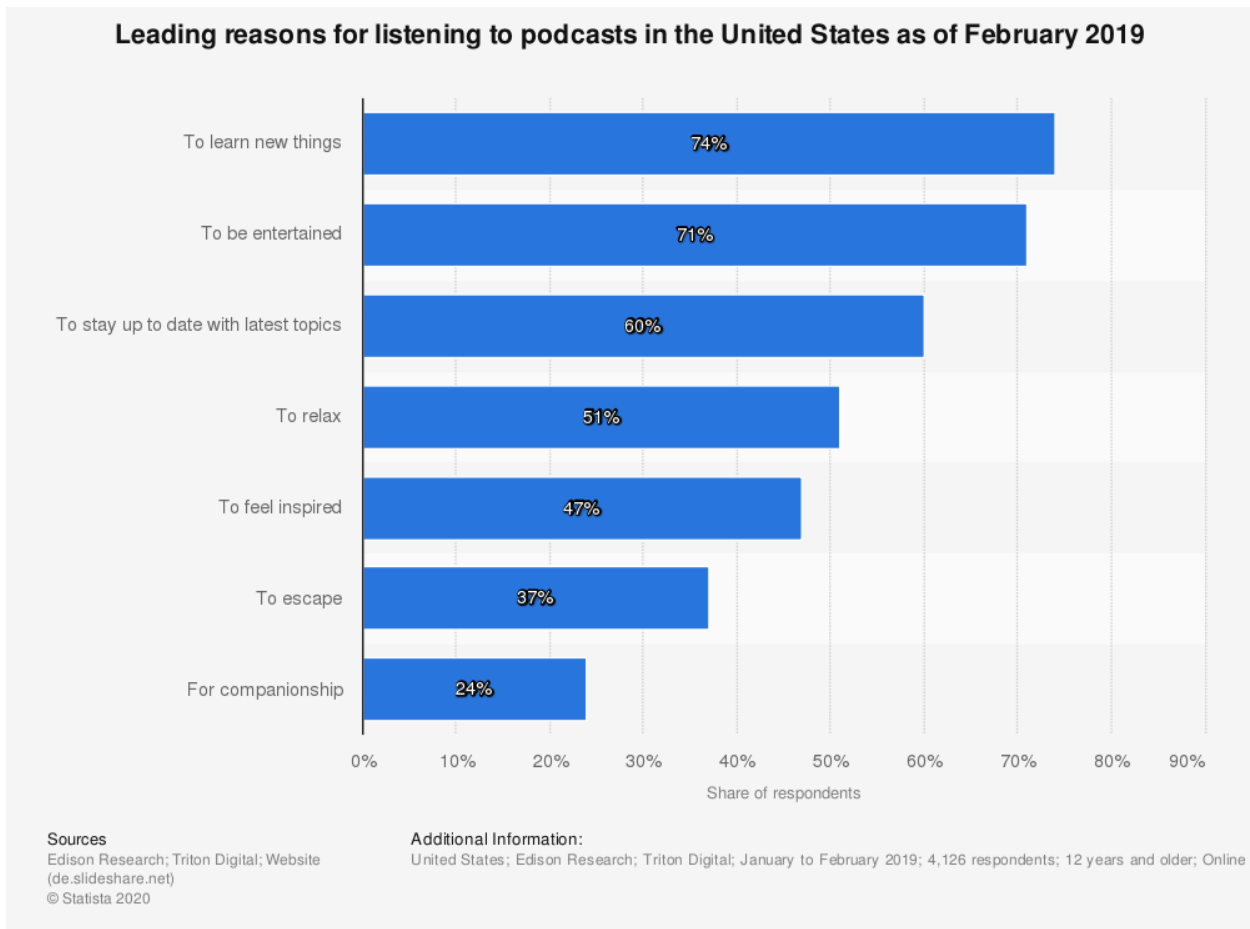


FIGURE 2. REASONS FOR LISTENING. Source: "Podcasting in the U.S.," Statista, 2020.

On the practical side, in training future arts administrators, a pedagogical goal is to provide students with the tools to succeed in their careers and to support the successful work of arts organizations. Fifty percent of all homes have podcast listeners in them. During the pandemic, arts organizations have, in fact, started to use podcasts as a method of program delivery. Prior to the pandemic, as early as 2006, many institutions were using podcasts as a means to stay connected to stakeholders across the globe. In fact, with over 1 million podcasts and over 85 million episodes, it is significant that music is one of the top genres, followed by entertainment. "Society & Culture" and "Arts" are genres listened to by 57.1% and 54.7% of podcast households, respectively, as seen in Figure 3 (Listen Notes, 2020). Thus, if institutions are using podcasts as programming and communication tools, then it is important that training programs provide students with an awareness and proficiency in podcasting as both a consumer and producer.

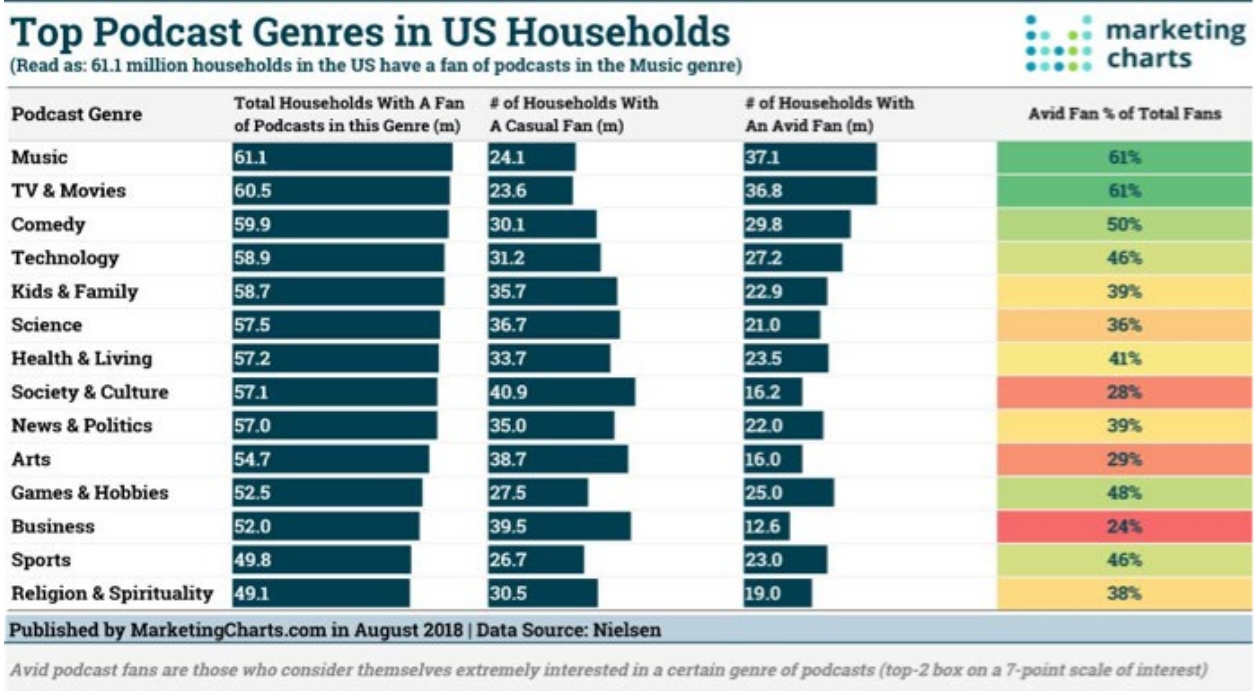


FIGURE 3. TOP PODCASTS IN U.S. HOUSEHOLDS. Source: “Top Podcasts in U.S. Households,” Marketing Charts, 2018. <https://www.marketingcharts.com/charts/popular-podcast-genres-us-households/attachment/nielsen-top-podcast-genres-in-us-households-aug2018>.

Pedagogical Theory

Humans have always told stories with sound—whether the language and parole of a powerful utterance, or the performance of music or song (Holquist, 1983). The technologies used for sonic communication continue to evolve. Podcasting has become a powerful pedagogical strategy to expand the possibilities for remote learning and professional practice in the arts and its management. Communications in the arts and culture can be seen as in constant flux. We navigate the creative tension between preservation and innovation, and between *techne* (creating or making) and technology (practical applications of scientific knowledge). Each generation responds to the impulse to create and uses the technologies available to them to communicate what they know, feel, and imagine. There are perhaps infinite ways to transmit knowledge, culture, and creativity. Employing audio knowledge objects in the classroom is a refreshing strategy to diversify the experience of in-person and remote learning (Bolisani, Borgo & Oltramari, 2012). Audio-based teaching and learning provides opportunities to cultivate important competencies undergirding collaboration and inclusion while sparking curiosity, activating multiple literacies, and supporting mental and physical health.

Multiple Literacies & Disrupting Hegemony

Employing transmedia technologies in the classroom provides additional opportunities to benefit justice-centered pedagogy committed to inclusion, diversity, equity, and access in the arts. Podcasting can be a strategy to expand the variety of expertise and experiences studied in the classroom, thereby expanding polyvocal and intersectional perspectives in the classroom (Crenshaw et al, 2019; Thimm, Chaudhuri & Mahler, 2017). Podcast generation can also increase empathy and resiliency through collaborative learning.

Podcasting can be a useful tool in any educator's anti-racism or anti-hierarchy toolkit by positioning voices that have been previously silenced, and/or misrepresented at the center (Kendi, 2020; Wilkerson, 2020; Hooks, 2015). Educators can create spaces and platforms for inquiry that disrupt hegemonic authority by amplifying practitioners' expertise about the arts and culture in contexts that are often missing from university settings, academic publishing, theatrical stages, and museum exhibitions. Including audio knowledge objects in one's teaching and learning strategies can also tap into the multiple literacies and intelligences of students and faculty (Gardner, 2011).

Audio-rich teaching and learning enhances accessibility to better serve participants who are differently abled and prepares students to imagine and better serve differently abled publics in their future careers. Everyone will experience disability in their life at some point, and arts management education would do well to prepare future professionals to better serve artists and audiences throughout the human life cycle.

Quality teaching and learning experiences delivered through mobile devices move asynchronous learning beyond a sedentary experience. Enhanced mobile enrichment options can bring value to time spent in transit and doing other necessary mundane tasks. Quality mobile learning experiences allow for the physical and mental health benefits of movement, potentially reducing negative externalities associated with remote learning such as sedentary behavior and excessive screen time.

Collaborative Competencies

Sequential podcasts, and audio knowledge objects of all kinds, can fortify polyvocal teaching and learning as participants practice the critical competencies of listening, giving voice, and collaboration. Educators committed to social justice can draw from a larger pool of experts to better diversify instruction. With thoughtful curation, this can expand the diversity of viewpoints, cultures, ages, contexts, and perspectives studied while developing compassionate listeners, courageous communicators, and collaborative teaching and learning to practice shared leadership.

In addition to gaining literacy in professional software, mechanics, and technologies, podcast generation cultivates the key competencies of attentive listening, public speaking, and personal and/or collective decision making about knowledge, style, and aesthetics.

The act of listening may appear overly simplistic, but listening to all members of the community is critical for a positive classroom ecology. In this case, both the production and consumption of podcasts can increase attention to active listening. Learning from different perspectives requires the ability to hear each other, including those with perspectives that may disrupt or challenge a particular worldview.

The complement to receptive listening is giving voice. Whether in a classroom setting or a professional arts space, people have different levels of confidence in public speaking. Hierarchical social structures often amplify powerful voices while demeaning or silencing people who occupy a lower status in the social hierarchy (Wilkerson, 2020). Whether you are comfortable with the sound of your own voice or shy to be heard, participation in podcast production can cultivate confidence while affirming the diversity of voices, perspectives, and expertise in the learning community.

Working multimodally plays to our strengths in the arts as transdisciplinary storytellers, music makers, visualists, and kinesthetic communicators. Everyone has a story. Diversifying teaching and learning tools creates spaces for participants to engage with important issues using different communication styles. This challenges participants to become sophisticated at code-switching across contexts, a trait that is not always deemed appropriate in academic discourse but is useful for professional practice in the arts.

Tools for Inclusion

Used creatively, podcasting can amplify access to the everyday heroism critical to democratic participation and cultural citizenship (Flores & Benmayor, 1997). Podcasting can draw attention to the everyday heroism of artists, arts administrators, and community members as knowledge and culture bearers. Creating and listening to podcasts can provide conduits for communication between the generations and offer ways to personalize the curriculum by bringing students' world, social capital, and creative interests to the center (Hooks, 2015).

Podcasting can be a powerful strategy for arts management pedagogy by cultivating communication, igniting multiple literacies, and connecting techne and technology in our learning communities all the while cultivating the critical qualities of inclusivity, collaboration, and connection.

Case Studies

Case Study One: Introducing Lifelong Arts Management Learning Through Podcasts, Waynesburg University

Overview

This case study will consider two assignments: the Podcast Listening Assignment and the Simple Podcast Creation Assignment. They can work in tandem or they can be used independently (particularly the Podcast Listening Assignment). They are also very versatile assignments: Dr. Batchelder has used them at two different universities, in five different departments, and in fourteen different types of courses. They are particularly effective for introducing students to the world of podcasting. In-class surveys of this instructor's undergraduates (often first-year students) taken before starting the assignment have shown that, while many of them have heard of podcasts, only 10% on average have actually listened to them. Therefore, the first goal is to have students listen to podcasts and to become familiar with important podcasts in their field of study. Dr. Batchelder reports affirmative results using the Podcast Listening Assignment across multiple classes and disciplines; often, but not always, this assignment is a forerunner to a Simple Podcast Creation Assignment.

The Simple Podcast Creation Assignment is a two-part assignment for undergraduates with limited podcast experience. It is a simple, low-stakes way for students to gain ownership of the podcast experience as creators, rather than simple consumers. It is also an important opportunity to diversify the voices they hear in the classroom. Students are instructed to find and interview professionals in the field they want to connect with and then turn that recorded interview into a podcast. Students then all listen to each others' podcasts. In a class of 30 students, divided into groups of 3, this gives students access to an additional 10 voices in their classroom.

Learning Outcomes for the Podcast Listening Assignment

- Students become familiar with podcasts, especially those touching on their field
- Students become familiar with significant names and figures in their field through relevant programming
- Diverse/outside voices are introduced into students' instructional experience
- Students are prepared for the Simple Podcast Creation Assignment

Learning Outcomes for the Simple Podcast Creation Assignment

- Students are able to communicate coherently, effectively, and creatively in both written and oral formats.
- Students learn to research significant figures in their field in preparation for the podcast

- Students become familiar with the basics of podcasting
- Students network with professionals in their areas of study
- Students demonstrate an ability to think deeply about important issues in the field
- Podcast creation brings diverse outside voices into the classroom
- Students become creators, not just consumers, of relevant course content

Assignments

The Podcast Listening Assignment includes a link or title of the podcast the instructor has chosen for the class to listen to and a short writing assignment with prompts. This ensures student engagement by requiring them to be attentive to the podcast, while also reinforcing the course themes present in the podcast. The instructor often adds a few open-ended prompts (student's favorite part of the podcast, what students learned, etc.). Such questions help the instructor assess what students are thinking about and learning from the podcast; this often proves to be surprising since students come to the assignment with diverse experiences and backgrounds. Such questions also allow the instructor to catch misunderstandings or promote unique viewpoints in advance of the class discussion. The assignment concludes with an in-class discussion of the podcast.

The Simple Podcast Creation Assignment is a two-part assignment for undergraduates with limited podcast experience. It works well in a group of three students. Part One of the assignment is to have each group identify a person they could interview regarding something pertinent to the subject of the class. Since podcasts can be recorded over the phone or online, students are not limited in their investigations by geography. After securing a date and time for the interview, students are required to research their interview subject and craft questions based on 1.) what is important to this particular course, 2.) the particular experience and expertise of their interviewee, and 3.) any subject matter research the group has done in advance of the interview.

Students are given a list of possible technologies they could use if they do not know where to begin. *The focus of this assignment is the subject matter of the interviews, not the technological aspect of podcasting*, so the instructor allows the students to complete the interview using any technology that they are comfortable with, including smartphones. Having completed the interview, students are required to edit their raw interview file to turn it into a podcast, meeting minimal requirements of length and subject matter. This is then submitted over the university's online learning management system.

Part Two of the Simple Podcast Creation Assignment is for all the students in the course to listen to all the podcast episodes created by the groups in their class. For a class of 30 students broken

into groups of three, the experience is like having 10 guest speakers bring their expertise into the classroom. Students write a short reflection paper considering each of the podcasts.

Lessons Learned/Best Practices

For the Podcast Listening Assignment, it is helpful to remind students that podcasts can be listened to while driving or doing simple tasks like cleaning. For students overwhelmed with assignments, it helps to remind them that this assignment can be done while mundane tasks are accomplished. With any luck, teaching students to listen to podcasts while they do other work will begin a lifelong habit of learning through podcast listening.

Any time students in a class are divided into groups, accountability for each group member is important. Utilizing a peer evaluation tool, where students rate the perceived effort of each member of the group after the group assignment is completed is often helpful, as long as this requirement is made very clear at the outset of the assignment. Another helpful requirement for undergraduate groups is to require that each student be present at the interview (either virtually or in-person), and that each member of the group asks questions of the interviewee.

Students should have multiple backup recording devices for the Podcast Creation Assignment. Problems from losing a recording to a recording being ruined by poor sound quality can be prevented by device redundancy. Since this assignment is more about the exposure to diverse content than the technology, it helps give students not familiar with technology multiple options with which to work in post-production.

For the Simple Podcast Creation Assignment, it has been very helpful to encourage students to think outside of the group's immediate networking circle. Students should take this opportunity to meet and network with a person they do not know, or barely know, who works in the field they are studying. Significant figures in the field of study may be flattered to be asked for a short interview, and it will give students a better network in the field for their future.



FIGURE 4. WAYNESBURG UNIVERSITY’S ENTERTAINMENT AND ARTS MANAGEMENT STUDENT SAMANTHA MORAD WORKING ON A PODCAST. Source: Samantha Morad.

Case Study Two: Leadership & Artistic Vision at Butler University

Overview

Case Study Three incorporates the use of podcasts in the curriculum as well as the creation of a podcast for the course’s final. Professor Brenda Johnston used podcasts for the first time in her Leadership & Artistic Vision class in the spring of 2019. Initially, her reasons for incorporating podcasts into the curriculum were to include more current information and more perspectives about leadership, understanding that not all the voices she wanted to include were available in written formats. She wanted to change up her approach to teaching and she wanted to find new ways for students to engage with material. Given the wide variety of options when it comes to books on leadership, Johnston was also challenged to determine which were the best options for the course. As Johnston was writing the course and listening to podcasts for consideration in the curriculum, she had the idea to use podcast creation for the course’s final instead of a traditional written paper. In addition to teaching her students new skills through podcast creation, this assignment would in-

crease the number of texts the students engaged with throughout the semester as each group chose a different leadership book to focus on in their podcast and everyone had to listen to each other's podcasts.

Learning Outcomes

- Assess various leadership styles and skill sets
- Recognize essential components of arts management responsibilities and organizational structures
- Reflect upon the nature and sources of artistic vision
- Communicate coherently, effectively, and creatively in both written and oral formats
- Demonstrate constructive critique skills
- Demonstrate skills related to podcast creation and recording

Assignments

Throughout the semester, students listened to various leadership podcasts related to the topics being covered. Some examples of the podcasts used include episodes from the “Nonprofit Leadership Podcast,” “EntreLeadership,” “Nonprofits Are Messy,” “Coaching for Leaders,” “The Remarkable Leadership Podcast,” and “Audioboom”. Students wrote reflections and critiques of the podcasts and discussed them together as a class.

For the final, students worked in teams of three to create their own 15- to 20-minute podcasts. Each team had to choose a leadership book to read, discuss, and then incorporate into their podcast. They could develop the format of their podcast, but they had to discuss and critique their chosen book and connect it to other topics covered throughout the semester, as well as the arts administration field. They could invite guests to be interviewed and connect their discussions to their personal experiences from internships or jobs. Each team had to develop a theme and style for their podcast. They were encouraged to have fun and be creative with this assignment.

In preparing the students for the podcast assignment, Johnston used the *New York Times*' “Project Audio: Teaching Students To Produce Their Own Podcasts” (Hicks, Winnick & Gonchar, 2018). She partnered with Butler University's Center for Academic Technology to have one of their Academic Technology Specialists teach the class how to use Audacity to record and edit their podcasts. The Academic Technology Specialist then took students to the university's sound booth (pictured below) and taught them how to use the recording equipment.



FIGURE 5. BUTLER UNIVERSITY'S SOUND BOOTH, CENTER FOR ACADEMIC TECHNOLOGY. Source: Butler University.

Once each podcast was recorded and uploaded to the course management system, each student had to listen to and critique each of the other three podcasts. They were asked to evaluate each podcast's introduction, delivery, content, enhancements (including sound effects), transitions, intro and exit music, and technical production. Students also completed an evaluation of their own team that included details about how they worked as a team, how they themselves could have done better as a team member, how the work was divided amongst the team members, and what they would do differently next time.

Lessons Learned/Best Practices

The feedback received from students was incredibly positive. Not only did they thoroughly enjoy listening to podcasts throughout the semester, but they appreciated the final podcast creation assignment. Students felt that they were able to communicate more effectively through the podcast, more so than if they had written a final paper. They were able to put the leadership skills they learned over the semester into practice as they worked as a team. Students resoundingly suggested that, in the future, students should create more podcasts throughout the semester. Each student would have liked to have created one or two five-minute podcasts on their own so that each person could learn the technology used. In the group project, one person tended to take on that responsibility. One thing that will change in the future is introducing the final assignment earlier. In 2019, the final assignment was introduced one month prior to the final due date. Students would

have liked more time to decide upon and read their chosen text and flesh out the podcast more than they were able to given the timeline. In the future, the final will be introduced at the beginning of the semester with check-in assignments throughout the semester to help keep students on track for the final due date.

Case Study Three: Research Integration and Internship Solutions, Carnegie Mellon University

Overview

The class, Research in Arts Management and Technology, is an elective open to anyone at Carnegie Mellon University (CMU) from undergraduate year-three students to those in graduate school. This class is designed to provide a breadth of skills that will serve emerging professionals in the fields of research, communication, and institutional development. With a focus on digital modes of communication, young professionals leave the course with effective skills to communicate ideas to peers, supervisors, and customers. Current and future leaders need to understand how to evaluate and conduct research of emerging opportunities in order to make effective decisions.

The course teaches students through a studio pedagogical framework how to do two things: conduct thorough and significant research and how to publish that research in a multimodal communication platform with a professional, not academic, style. Research that engages in current problems within the contemporary discourse of the field is submitted to the Arts Management and Technology Lab Research Center for evaluation and publication on the platform (<https://www.amt-lab.org>). Teaching multimodal, also known as transmedia, communication techniques includes using podcasts and audio as a potential component of reporting research findings.

Learning Outcomes

The overall learning objectives for the course are:

- Refine nonfiction multimodal writing skills—both style and mechanics
- Gain skills for distribution pathways in content curation for the web in written, audio, and visual storytelling formats
- Generate content for a professional portfolio
- Gain skills in locating and using diverse and reliable research materials to support a planned research project

Activities include scripting and recording a podcast episode. The episode can be in any of the dominant models: an interview, a conversation, a narrated multi-speaker episode, or a solo report. Much like written work, if the podcast script has merit, then the student works with the research center's technology manager and podcast producer interns to make a recording for the platform's podcast, Tech in the Arts.

Assignments

The podcast module covers three lessons. The first is an introduction to podcasting. Prior to class, students read about the history of podcasting and some of the predominant approaches. On the discussion board (hosted on Canvas), each student submits a podcast that they listen to and a one paragraph analysis of the podcast structure and approach. The second class focuses on breaking down a podcast script. Much like the first lesson, students read about best practices and then select a podcast episode of their choice to analyze. They submit the podcast analysis via the course's discussion board then compare with their peers during class. During the last half of the class, they evaluate their own research and how a podcast could be used as a means to share their findings. They are provided a podcast script model and a blank script for their script assignment (*New York Times*, "Project Audio), which is due the following week. The final day covers skills for conducting interviews and overall podcast recording tricks. At the end of the week, they submit a recording of their script. They must also listen to the recording and upload a reflection on their process and product.

Tools & Tips

Specific tools and approaches have proven necessary for student success. Providing a sample script, a script worksheet, and analysis prompts are critical for students to move forward from critical thinking to content generation. Additionally, peer feedback and practice time is important for active learning during class time.

For an in-class podcast feed, tools can be as simple as a cellphone. However, for content published for a global research center with an established podcast with over 365,000 downloads, quality needs to be significantly higher. A microphone (Yeti is an often recommended brand) is essential, as is software for editing (such as Audacity or Adobe Audition) and transcribing (Otter.ai or Descript, for example). For distribution across a broad set of aggregators, using a tool like Libsyn or Podbean is critical. The Tech in the Arts podcast publishes on iTunes, Spotify, Stitcher, and Google (and will likely add more this year).

Lessons Learned/Best Practices

Just inserting podcasts as a listening assignment into the class with an assumption that students will jump at the opportunity to try it fails. Even utilizing an extra credit assignment to create a podcast is insufficient to garner confidence to make the leap. Being a consumer is very different from being a producer, and scaffolding the tools was necessary for students to gain competency and confidence. Creating critical thinking around the media they consume daily often produces surprising results, even for them. It gives students a sense of control and understanding of their world and ownership of a content stream. The final podcast assignment offers them a chance to bring their words to life in a new and exciting way.

Gaining facility with podcasting helps the future arts manager think broadly about modes of communication. Hopefully the future arts manager will be poised to have ownership of launching a new idea, like a board meeting podcast, in their workplace.

Students also learn to differentiate between the ideation of podcast content and student trial-and-error, and a truly professional podcast. While the research center began podcasting in 2006, moving from a rough student script idea to a professional quality podcast episode takes significant time, and some technological expertise outside of the course scope.

To help solve this, particularly the work of compiling and managing the technology for podcast distribution, I hired two students to work as interns in the research center and it is their job to actually produce the content of the podcast. Interns produce their scripts (when there is no content coming from students in the class), record, edit, transcribe, and publish. Interns typically come with little to no experience in audio producing, editing, or transcribing, much less publishing to a podcast hosting service and measuring listenership. Last year, they even began creating their own news talk shows. The learning curve of these two internship positions has been significant and critical to their future career trajectories. Our first podcast producer was accepted at the CMU TedX Expo 2020 and has been hired to work in podcasting at a U.S. nonprofit.

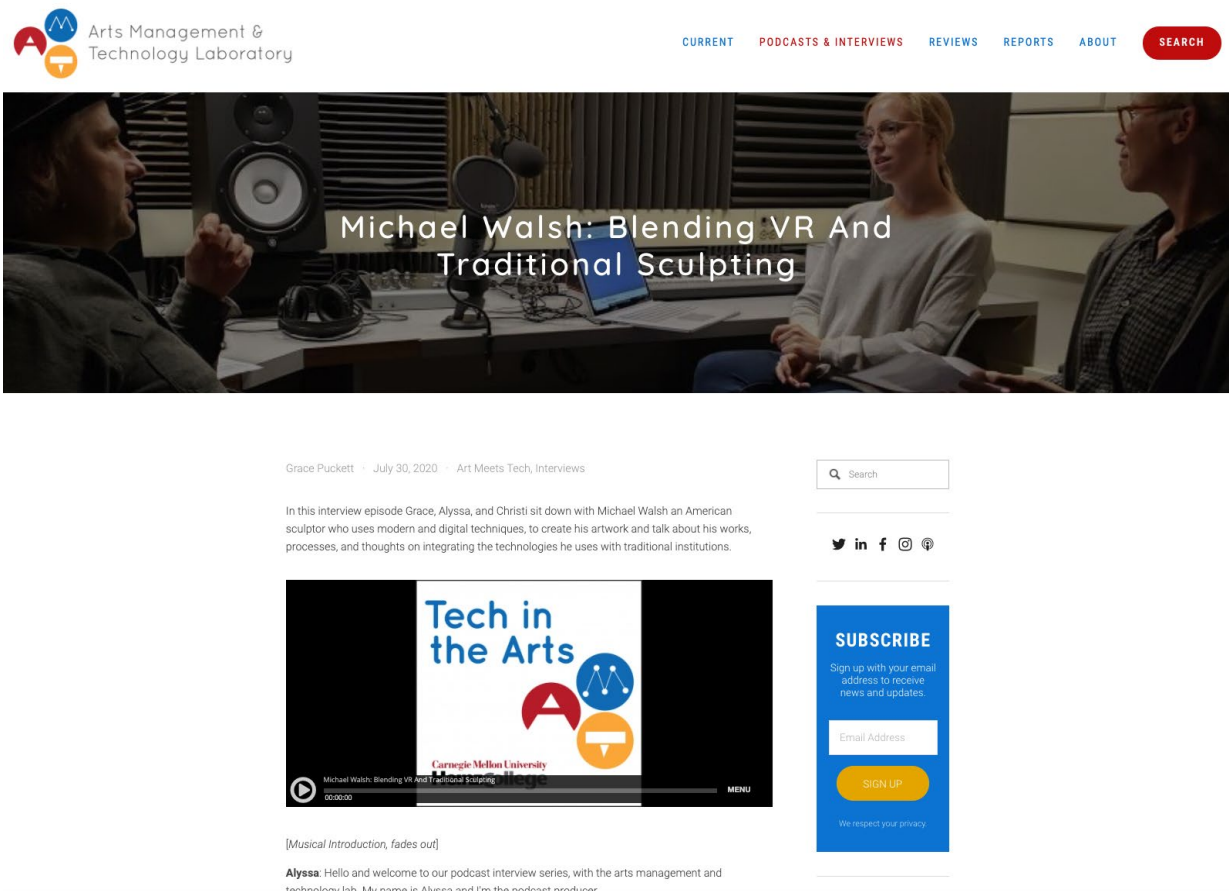


FIGURE 6. SCREENSHOT OF PODCAST EPISODE ON AMT LAB WEBSITE. Source: Alyssa Wroblewski.

Case Study Four: On Producing Podcasts as a Pedagogical Tool, Wayne State University

Overview

Arts administrators are, at their roots, organizers and distributors of an organization’s story. In that way, they too are storytellers. But how do you teach storytelling in a discipline that is typically more focused on data and analytics? Wayne State University’s Theatre Management MFA program did this by embracing the art of storytelling in podcast production. This practice builds a mix of soft and hard skills that enhance the students’ professional skills.

Disrupted by a Virus

In March 2020, the world fell victim to a global pandemic with the spread of COVID-19 and the theatre industry shuttered in an attempt to thwart continued spread of the infection (Ainsworth, 2020). Our concern at Wayne State University became, how do we adapt our practice-based program—

where graduate students study, develop, implement, and analyze campaigns they've developed—to a new format that is, effectively, absent of “product”?

Prior to the pandemic, the possibility of developing a podcast as a new tool for audience engagement had been discussed. We recognized dwindling participation in our in-person pre- and post-show discussions. Surveying the audience, we learned this was related to the audience's lack of time in their schedules. Audiences expressed their interest in these events but explained that their hurried lifestyles gave them limited time to visit the theatre. Detroit being the Motor City, we recognized an opportunity to make these engagement programs available while guests were driving to and from the venue. We would invite audiences to listen to a podcast while on the way to the performance where the creative team would discuss the production. Following the performance, audiences could listen to a follow-up episode that asked them to consider specific questions related to the performance through which they could engage with friends and family.

With the closure of our venues, we reconceived our podcast's purpose. We recognized the value in engaging our audience outside of our space—staying top of mind, building our relationships—and chose to pursue the effort with a new angle: deep dives into topics related to the process of creating theatrical works in this “new normal”.

Producing as Pedagogy

In August 2020, we made some important decisions about the podcast. Students were asked how they believed they would benefit from the practice of producing this podcast, what skills they felt they could develop through this project, and what strengths they could bring to the project as individuals and team members.

The students were interested in becoming comfortable with the technology, developing episodes that addressed real-world concerns for the theatre, and analyzing listenership and feedback for continued development and growth.

Knowing that the podcast's focus would be on theatre, a name was chosen that would relate to the industry and the value of communication: “Five Minutes to Places”—a phrase known to anyone who has worked backstage, but also intriguing enough to invite the curious listener.



FIGURE 7. WAYNE STATE UNIVERSITY MFA THEATRE MANAGEMENT STUDENT, HANNAH ZEISS, INTERVIEWING PAINTED BLACK STL CO-FOUNDER, JAYVN SOLOMON, OVER ZOOM. Source: Hannah Zeiss.

Discovering Skill Sets and Understanding Goals

In producing the podcast, the students work together as producers and hosts. They immediately recognize the value in understanding and implementing a strategic plan: building their content calendar and developing an overall story arc for the program. They develop skills in personal communication while writing appeals to potential guests and coordinating efforts with each guest or their representative. They understand the need to speak calmly and eloquently while also allowing their personality to shine, originally feeling an impulse to mimic the “NPR style” of hushed tones, but soon becoming comfortable with their own voice and style as hosts (Van Nostrand, 2019). They learn how to use tools like Adobe Audition to edit dialogue, making it “show ready” for the public to enjoy. They monitor listenership and study engagement analytics through Libsyn (the platform chosen for distributing the podcast). They recognize a need to be nimble and adaptive in their content calendar, shifting guests as needed to carry the topics to their natural end point.

After the first month, the podcast had 381 downloads. According to thepodcasthost.com, “within 30 days of its release [if your show gets] more than 136 downloads, you're in the top 50% of podcasts” (McLean, 2020). Based on this early metric, the students are thrilled with the engagement which has prompted additional enthusiasm for the project.

Learning Outcomes

- Understand and utilize software
- Become familiar with data mining and analysis
- Learn how to manage a show
- Develop a marketing campaign

- Strengthen soft skills such as organization, team building and collaboration, problem solving, adaptability, relationship building, and communication

Case Study Five: Audio Knowledge in the Arts Management Practicum, Claremont Graduate University

Overview

Audio assignments can enrich graduate level studies and capstone projects. This case study discusses how and why audio knowledge objects have been included in a capstone course for second year graduate students in arts management. The Arts Management Practicum is a praxis-based course where students define and implement a real world project with a community partner or develop an entrepreneurial project in the arts. Students perform organizational and ecosystem analyses, participant observation, and open-ended interviews with arts professionals while completing some form of mutually defined public service in the arts. The process cultivates critical thinking while increasing student awareness of how to use social research methodologies and digital humanities to analyze social conditions and identify opportunities for arts management innovations in the real world. The course emphasizes applied work done on the ground in the community. Students present their learning outcomes to the broader community through writing, public speaking, and multimedia. The course is a space for applied teaching and learning, community service, and strengthening intergenerational networks in the arts and culture. Student projects are amplified publicly and are visible online. (<https://www.artsmanagement.online/capstone-2020>, <https://www.artsmanagement.online/work>). This process has inspired alumni to include transmedia in their professional work supporting the arts and cultural landscape.

Learning Outcomes

The overall learning objectives of the class are:

- Work independently and collaboratively to define, complete, and analyze experiential learning in arts management, or generate an autonomous entrepreneurial project in a real world setting
- Catalyze critical thinking, original research, and informed decision making about arts management
- Cultivate communication, presentation, and facilitation skills for professional success in writing, public speaking, and multimedia
- Compose a written analysis of applied learning outcomes with multimedia resources that demonstrate original inquiry and professional rigor

Learning activities include composing a scope of work with a community partner for an apprenticeship or a proposal and timeline for action for an entrepreneurial project. Producing successful audio segments provides an alternative platform for storytelling about practicum projects and proved particularly significant during the pandemic given social distancing mandates for public health. Audio assignments in the Practicum 1.) amplify student self representation and leadership, 2.) foster personal connections between students and arts professionals in the field, 3.) center community epistemologies and social conditions in our learning process, and 4.) generate and share knowledge.

Assignments

The Practicum is spread out over two semesters and includes numerous professional and research assignments culminating in a final paper and multimedia presentation. For the sake of this discussion, I focus on how audio assignments support capstone studies through self representation, learning from community, and qualitative research on professional practice. The first audio assignment is to write and record a personal mission statement. The aim of this assignment is self awareness, self leadership, and giving a voice to career aspirations in the arts. This activity helps to develop an inclusive classroom ecology and amplifies student voices to the larger arts ecosystem online. The focus of this assignment is giving voice. The second assignment is to listen to artists and arts administrators in the community by structuring, recording, and editing a personal interview with an arts professional. This assignment emphasizes compassionate listening as a leadership trait. Depending on the project, students with a greater interest in qualitative research go on to perform additional open-ended interviews or lead focus groups to inform their analysis. Interview methods are sometimes accompanied by surveys or quantitative analyses generating multimethod data to inform arts management decision making. Examples of the former in 2020 include Anabelle Liao's field scan of dance in Los Angeles informed by numerous audio interviews with choreographers and dance managers about their adaptations to working conditions during the pandemic, and Yvonne Farrow's racial equity research informed by the perspectives of Black employees in the City of Los Angeles. *Versos y Besos: The Anthrophony of Manuela García* reinterprets the world of sound of a Latina songstress and culture bearer—Manuela García—to restore her to public memory. This intergenerational project for the Autry Museum is an example of how audio rich pedagogy can have a ripple effect generating innovative professional practices in the field post graduation (Campbell & Ngan, 2020; Shimshon-Santo, 2020).

Conclusion

Podcasts reflect our needs in contemporary life; the ease with which we can engage in podcasts, from listening during other activities such as driving or exploring the city on foot, enables us to ex-

perience the world and learn from others in a uniquely mobile fashion. Half of the top podcasts in recent years focus on learning opportunities, demonstrating a desire by the larger population to advance themselves and their understanding of the world. As storytellers, we are drawn to the stories of others. This is not new to podcasts. Education itself is about growth through storytelling. Podcasts push the “how” of education into new technologies.

More cultural institutions are sharing their work with their stakeholders and other constituencies through podcasts than ever before, and thus it is critical that our future arts leaders understand the vocabulary and technical skills needed to provide for these programs—particularly during a global pandemic when access to in-person artistic experiences is limited. Pandora’s box has been opened, meaning that even after the pandemic, this new system of remote engagement and learning will remain prevalent and continue to grow.

Additionally, by their inclusion in academic development, the use of this transmedia platform realizes the urgent necessity of inclusion, equity, and diversity by providing educators, students, and the public with access to the thoughts and experiences of people from across the globe in formats that work best for them. We expand our audience when we expand our tools to suit them. The arts and our burgeoning leaders must understand how to both learn from our collective world experiences and how to utilize podcasts in the greater dialog about our humanity.

Access to this larger pool of experts and experiences illuminates changes in our own mission, advancing our personal ways of thinking through a shared experience of audio. The internet dramatically changed our education experiences—inviting an expanded worldview to our desktops, laptops, tablets, and phones—and podcasts are a further extension of this now nearly ubiquitous tool. Unlike the internet, podcasts fulfill their mission in a more robust way. The simple act of hearing, of listening, can make significant changes to the listener’s viewpoints and beliefs. We listen and we give voice to those who want to be listened to.

Not only does the experience of listening to podcasts have a fundamentally profound impact on the education of our arts leadership students, the act of creating podcasts instills in them important hard and soft skills. The learning of project management skills and the value of time, cost, and scope become valuable educational experiences that help further our students’ ability to be strategic thinkers and planners. Developing content for each episode requires that students refine their research methods and cultivate multimodal writing skills. Students also develop leadership skills in managing the podcast and their team of peers, which also encourages growth in collaborative skills. Understanding and evaluating the success—as defined by both the students and their men-

tors—of each podcast or episode aids in analytical skill-building. These crucial attributes of successful arts leaders are developed through both the classroom engagement of podcasts and through the production of podcasts that speak to critical issues for each student.

Finally, podcasts' timeliness and their relevance to current issues and events cannot be dismissed. In an industry in which our tools and technology are ever changing and ever advancing, textbooks, which can become outdated in a single academic year, become less relevant. Podcasts, on the other hand, speak to the world as it is in the moment. New episodes mean new opportunities to learn.

Podcasts offer us all the opportunity to learn about today and tomorrow in real time, the chance to develop the hard and soft skills discovered in podcast listening and production, and the experience of being strategic leaders who can shepherd our organizations to the future.

REFERENCES

- AINSWORTH, A. (2020) "Michigan Coronavirus Closures: Does Executive Order Include Barber-shops and Salons?" WDIV Local 4 / Click on Detroit. WDIV. <https://www.clickondetroit.com/news/michigan/2020/03/17/michigan-coronavirus-closures-does-executive-order-include-barbershops-and-salons>.
- BOLISANI, E.; BORGIO, S. & OLTRAMARI, A. (2012) Using Knowledge as an Object: Challenges and Implications. *Knowledge Management Research & Practice*, 10 (3), 202–5. <https://doi.org/10.1057/kmrp.2012.32>.
- CAMPBELL, B & NGAN, J. (2020) Versos y Besos / The Responsibility of Sonic Transference / Britt Campbell & Janice Ngan. *ASAP/Journal*. asapjournal.com/versos-y-besos-the-responsibility-of-sonic-transference-britt-campbell-janice-ngan/.
- CRENSHAW, K.; HARRIS, L.C.; MARTINEZ, D.H. & LIPSITZ, G. (2019) *Seeing Race Again: Countering Colorblindness across the Disciplines*. Oakland, CA: University of California Press.
- HICKS, J.; WINNICK, L. & GONCHAR, M. (2018) Project Audio: Teaching Students How to Produce Their Own Podcasts. *New York Times*. <https://www.nytimes.com/2018/04/19/learning/lesson-plans/project-audio-teaching-students-how-to-produce-their-own-podcasts.html>.
- HOLQUIST, M. (1983) Answering as Authoring: Mikhail Bakhtin's Trans-Linguistics. *Critical Inquiry*, 10 (2), 307-19. <http://www.jstor.org/stable/1343352>.
- HOOKS, B. (2015) *Feminist Theory: from Margin to Center*. New York: Routledge.
- FLORES, W.V.; BENMAYOR, R. (1997) *Latino Cultural Citizenship: Claiming Identity, Space, and Rights*. Boston: Beacon Press.
- GARDNER, H. (2011) *Frames of Mind: the Theory of Multiple Intelligences*. New York: Basic Books.
- KENDI, I.X. (2020) *How to Be an Antiracist*. New York: Random House Large Print.

Listen Notes. (2020) Podcast Stats: How many podcasts are there?

<https://www.listennotes.com/podcast-stats/>.

MCLEAN, M. (2020) Podcast Download Numbers: What's a Good Gauge for My Podcast? *The Podcast Host*.

<https://www.thepodcasthost.com/planning/whats-a-good-number-of-downloads-for-a-podcast/>.

Podtrac. (2020) Top Podcast Publishers. <https://analytics.podtrac.com/podcast-publisher-rankings>.

PRENSKY, M. (2001) Digital Natives, Digital Immigrants. *On The Horizon*, 9 (5-6).

SHIMSHON-SANTO, A. (2020) Born in Los Angeles on Los Angeles Street / Amy Shimshon-Santo. *ASAP/Journal*. <http://asapjournal.com/versos-y-besos-born-in-los-angeles-on-los-angeles-street-a-poem-for-manuela-garcia-amy-shimshon-santo/>.

TESKE, C. (2020) What is an RSS Feed? *Lifewire*. <https://www.lifewire.com/what-is-an-rss-feed-4684568>.

THIMM, V.; CHAUDHURI, M. & MAHLER, S. (2017) Enhancing Intersectional Analyses with Polyvocality: Making and Illustrating the Model. *Social Sciences*, 6 (2), 37.

<https://doi.org/10.3390/socsci6020037>.

VAN NOSTRAND, L. (2019) Sounding Like A Reporter — And A Real Person, Too. *NPR*.

<https://www.npr.org/sections/publiceditor/2019/08/07/749060986/sounding-like-a-reporter-and-a-real-person-too>.

WILKERSON, I. (2020) *Caste: the Origins of Our Discontents*. New York: Random House.

ABOUT THE 2020 ENCATC DIGITAL CONGRESS

The ENCATC Annual Congress is the only global event dedicated to the advancement of theory, education, research and practice on cultural management and policy.

Since 1992, it has become the cornerstone in the annual calendar for educators and researchers from the cultural management and policy educational fields with cross-disciplinary interests to connect with professionals, policy makers, and artists. Together they work to address pressing issues, explore ground-breaking innovations, bridge the knowledge gap, promote research esteem and the evolution of pedagogy, and encourage steps to ensure significant improvements in this industry.

Due to the COVID-19 pandemic, the ENCATC Digital Congress will be held online from 3 to 11 November 2020.

This year's theme "Cultural management and policy in a post-digital world – navigating uncertainty" could not be more relevant as our industry learns with continuing urgency how to adapt, cope, and innovate.

The Annual Education and Research Session is one component of the Congress programme since 2010. The Education and Research Session is an annual gathering of the international research and education community. It provides a unique interdisciplinary environment to get the latest world-class research conducted in the field of cultural management and policy and the most innovative practices in teaching and training.

www.encatccongress.org

INTERNATIONAL JOURNAL *of* ARTS MANAGEMENT

**Stay Informed about
the Most Recent Research
on Arts Management**

Visit our web site
gestiondesarts.hec.ca

Carmelle and Rémi Marcoux
Chair in Arts Management
HEC MONTRÉAL

ENCATC is the European network on cultural management and policy. It is an independent membership organisation gathering over 100 higher education institutions and cultural organisations in over 40 countries. ENCATC was founded in 1992 to represent, advocate and promote cultural management and cultural policy education, professionalize the cultural sector to make it sustainable, and to create a platform of discussion and exchange at the European and international level.

The European Commission support for the production of this publication does not constitute an endorsement of the contents which reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Avenue Maurice 1
1050 Brussels,
Belgium

T +32 (0)2 201 29 12
info@encatc.org
www.encatc.org



Co-funded by the
Creative Europe Programme
of the European Union

ISBN 978-92-990088-2-9