

ORGANIZING, PROMOTING AND ENABLING HERITAGE REUSE THROUGH INCLUSION. ACCESS, GOVERNANCE AND EMPOWERMENT

Deliverable 2.1

Detailed Workplan for WP2

WP lead: Eutropian GmbH (Levente Polyák, Daniela Patti, Bahanur Nasya)

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Responsible		Eutropian Gmb	
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1. Short description of the WP's goals:

a. aims and tasks based on the Grant Agreement/Proposal

The work package focuses on the complex, integrated analysis of 16 Observatory Cases (OCs) that provide the micro level in the multi-level analytical framework of OpenHeritage. Work within the WP will focus on a contextualised understanding of how adaptive re-use works in practice, how the specific local circumstances interact with the larger institutional and regulatory framework, and how this interaction influences the outcome of the specific re-use projects. The 16 OCs have been selected to reflect a diversity of geographical situations and heritage assets involved, and also to provide important insights and good examples in one of the three aspects of the inclusive model of adaptive re-use put forward by OpenHeritage: community/multi-stakeholder involvement, resource integration and regional/territorial integration. To achieve its aims the WP will produce an individual analysis of the OCs, an overarching comparison among them, and focus on the questions of transferability. These activities will also facilitate the production of the database (Task 2.3) that, accessible to a wide audience but also applicable for teaching purposes in higher education, will be an important mean to display how the actual practice of adaptive heritage re-use and the macro-level regulations are connected.

Task 2.1 Anthropological analysis of individual Observatory Cases (M1-M24):

The in-depth analysis of each OC will focus on understanding how the adaptive re-use was carried out, how does the site function now, and how the particular local process was embedded into its regional/national institutional context. The complex analysis will always be accompanied with site visits to conduct stakeholder interviews, and to shoot a short video of the processes, the results of which will be uploaded on the database (see Task 2.3).

Observatory Cases are:

Cascina Roccafranca (Turin, IT) - EUTROPIAN

Convento delle Cappucine (Naples, IT) - UNIROMA3

Sargfabrik (Vienna, AT) - MRI

Fargfabriken (Stockholm, SE) - EUTROPIAN

Largo Residencias (Lisbon, PT) - EUTROPIAN

Jewish District (Budapest, HU) - CEU

La Fábrika de todo la vida (Estremadura, ES) - PLATONIQ

Halele Carol (Bucharest, RO) - EURODITE

Old Market Hall (Bratislava, SK) - EUTROPIAN

Potocki Palace (PL) - CEU

ExRotaprint (Berlin, DE) - EUTROPIAN

Darwin Ecosystème (Bordeaux, FR) - EUTROPIAN

Jam Factory (Lviv, UA) - CENTER FOR URBAN HISTORY

The Green Metropolis (BE-DE-NL) - UGENT

Navy Yard (Amsterdam, NL) - EURODITE

Citadel (Alba Iulia, RO) - CEU

Task leader: EUTROPIAN

Contributing partners: CEU, MRI, EURODITE, PLATONIQ, CENTER FOR URBAN HISTORY, UNIROMA3, UGENT Reviewers: LUISS, UBER (for key deliverable 2.2)

Task 2.2 Comparative analysis of Observatory Cases (M7-M24): focusing on a detailed overview of the micro-level adaptation practices, from 4 main aspects:

- community and multi-stakeholder integration: here the analysis will identify unique core features of the OC areas, their key stakeholders, and opportunity maps to compare them to ongoing heritage preservation and management processes;

- resource integration: the use and application of innovative financial tools and non-financial resources in CH maintenance and management based on a wide range of mechanisms including ethical investment, social finance, impact investing, civic and solidarity economy, local entrepreneur involvement, and local resource pooling which will combine and apply more traditional community-based economic development theories with the theory of innovation and theories on mission-oriented and public value/public purpose public policies;

- regional/territorial impact: the analysis will examine the integration of heritage preservation and management processes into broader local development concepts of urban, peri-urban neighbourhoods or rural areas, where new uses and physical transformations can catalyse wider improvements in an area's social and economic conditions by opening new opportunities for job creation, community cohesion, education, and the local economy.

- heritage impact: the different heritage designation and protection makes to the development of a site, to the maintenance of the heritage assets, to its visibility and economic sustainability.

Work in this task will provide guidance for general recommendations regarding transferability of good practices and give input both for the development of an economic, legal, institutional toolbox for collective and participatory governance of cultural heritage and for the Cooperative Heritage Labs.

Task Leader: LUISS

Contributing partners: CEU, MRI, EURODITE, PLATONIQ, CENTER FOR URBAN HISTORY, UNIROMA3, UGENT, EUTROPIAN

Task 2.3 Complex database development (M7-M30): An easily accessible, searchable database with the aim to display the results of the macro and micro level overview, and allowing to contrast the institutional/legislative environment with the actual practice of adaptive re-use. The online database is an important component of OpenHeritage's multi-purpose website and will follow an open format allowing for comments and additional material to be added.

Task leader: CENTER FOR URBAN HISTORY

Contributing partners: EUTROPIAN, PLATONIQ, UNEW, ICLEI

Reviewer: MRI (for key deliverable 2.5)

Task 2.4. Embedded transferability analysis (M13-M24): focusing on the 16 OC cases this task looks at the transferability of their experiences, taking into account the various actions implemented by the local stakeholder networks. This task provides input into the WP 3's development of a transferability matrix.

Task leader: UBER

Contributing partner: UGENT

b. deliverable timeline

D 2.1 Detailed Work Plan for WP2 - this deliverable refines and summarises the work to be conducted in WP2, serves as a guideline for the WP leader and participants; Task 2.1, delivered at M3 (August 2018);

D2.2 Individual Report on the Observatory Cases - this deliverable analyses the financial, business and governance models, mechanisms of community involvement and territorial impact of individual Observatory Cases; comparison of the Cases along the same criteria, against the background of various regulatory and policy environments; Task 2.1, delivered at M18 (November 2019), Key deliverable; (EUTROPIAN)

D 2.3 Video reports of the Observatory cases - this deliverable provides a video report of all Observatory Cases, based on the site visits and interviews. It tells the story of Observatory Cases in a format that is easy to access and to disseminate to broader audiences; Task 2.1, delivered at M24 (May 2020);

D 2.4 Report on the comparative analysis of Observatory Cases – this deliverable creates a comparative overview of the 16 OCs along the 3 main criteria of inclusive heritage re-use; Task 2.2, delivered at M24 (May 2020);

D2.5 Complex database of adaptive heritage re-use - online database showcasing the results of the institutional analysis and the OCs in a searchable structure; Task 2.3, delivered at M30 (November 2020), Key deliverable; (CENTER FOR URBAN HISTORY)

D2.6 Transferability report of the Observatory Cases – focusing solely on the 16 OCs, this deliverable examines how wide spread the models used in the OCs are, and how much their operation depends on the specific local circumstances; Task 2.4, delivered at M24 (May 2020).

c. task specific timeline – internal schedule to create the deliverables

D 2.1 (Detailed Work Plan) is drafted during M2 (July 2018) and the draft is discussed together with all participating organisations in M3 (August 2018), leading to the finalisation of the document by the end of M3.

D2.2 (Individual Report on OCs) and **D2.3 (Video Reports on OCs)** will be developed together. As different contributing partners are responsible for a variety of numbers of OC Studies (EUTROPIAN 6, CEU 3, EURODITE 2, UNIROMA3 1, CENTER FOR URBAN HISTORY 1, PLATONIQ 1 and UGENT 1), a shared timeline is created to orchestrate the process. By M5 (October 2018), an Observatory Case template and methodological support document will be created by EUTROPIAN and shared with contributing partners.

- By M4 (September 2018), a survey will be produced to collect input from the Cooperative Heritage Labs leaders about the main challenges they will likely to face during the implementation of the CHLs. These challenges include regulatory, policy, social, environmental, economic, etc. issues. This survey will provide information to be fed into WP2 and help focus the case studies on the most important issues that CHLs face. Similarly, the survey's results will also shape the focus of WP1, putting in the centre of the research the policy areas most relevant for CHLs.

- By M6 (November 2018), feedback to this document will be collected and the OC template will be finalised with help from all partners.

- By M7 (December 2018) a first Observatory Case study example will be created by EUTROPIAN and shared with contributing partners.

- By M10 (March 2019), a first round of Observatory Case Studies and corresponding videos (with site visits and interviews with protagonists, stakeholders and case-holders) will be produced by EUTROPIAN and all contributing partners.

- By M11 (April 2019) feedback to this first round of Observatory Case Studies and corresponding videos will be given by EUTROPIAN.

- By M13 (June 2019), a second round of Observatory Case Studies and corresponding videos will be produced by EUTROPIAN and all contributing partners.
- In M13, findings from the OC analysis process will be provided to CHLs, and will be incorporated in the implementation of WP4.
- By M14 (July 2019) feedback to this second round of Observatory Case Studies and corresponding videos will be given by EUTROPIAN and LUISS.
- By M16 (September 2019), a third round of Observatory Case Studies and corresponding videos will be produced by EUTROPIAN and all contributing partners.
- By M17 (October 2019) feedback to this third round of Observatory Case Studies and corresponding videos will be given by EUTROPIAN and LUISS.
- By M18 (November 2019) all Individual Observatory Case Studies will be completed and a Summary Report will be produced.
- From M18 (November 2019) to M24 (May 2020) all OC videos will be produced and will be framed by a coherent narrative.

D2.4 (Report on Comparative Analysis) will be developed in parallel with D2.2 and D2.3.

- In M6 (November 2018), LUISS and all other partners will give feedback to EUTROPIAN about the Observatory Case template and methodological support document, identifying a number of points of comparison to take into account when developing the OCs.
- By M8 (January 2019), LUISS and all other partners will give feedback to EUTROPIAN on the first Observatory Case study example, thus shaping the model for other OC Studies.
- LUISS will join EUTROPIAN and other partners in giving feedback to the first, second and third round of Observatory Case Studies and videos by M11 (April 2019), M14 (July 2019) and M17 (October 2019). These feedback rounds, including inputs from all other partners as well, will help shaping the OCs towards comparability, thus helping LUISS in the Comparative Analysis of OCs. UGENT will provide methodological support for the analysis.
- In M13, findings from the comparative analysis process will be provided to CHLs, and will be incorporated in the implementation of WP4.
- Between M18 (November 2019) to M24 (May 2020), LUISS will finalise the Comparative Analysis of OCs and produce a Report.

D2.5 (Complex Database on Adaptive Reuse) will rely on WP2's Observatory Cases and on WP1's macro scale overview of heritage-related policies.

- By M6 (November 2018), CENTER FOR URBAN HISTORY (together with other partners) will give feedback to EUTROPIAN about the Observatory Case template and methodological support document, identifying a number of methodological tools to develop the OCs.
- CENTER FOR URBAN HISTORY will join EUTROPIAN in giving feedback to the first, second and third round of Observatory Case Studies and videos by M11 (April 2019), M14 (July 2019) and M17 (October 2019). These feedback rounds will help identifying the variables that will structure the database and that can serve as tags or search criteria in the website.
- In the meanwhile, between M7 (December 2018) and M24 (May 2020), CENTER FOR URBAN HISTORY will synchronise the variables between the research done in WP1 and WP2, coordinating communication and exchange with UNEW and EUTROPIAN.
- By M11, PLATONIQ will give input to CENTER FOR URBAN HISTORY about the data model to be used. This input will open a group discussion on data ethics and open source tools and methods.
- Between M24 (May 2020) and M30 (November 2020), CENTER FOR URBAN HISTORY will finalise the database with important feedback from PLATONIQ, EUTROPIAN, UNEW, UBER, and LUISS.

D2.6 (Transferability Report of the OCs) will rely on WP2's Observatory Cases and on WP1's macro scale overview of heritage-related policies.

- By M6 (November 2018), UBER (together with other partners) will give feedback to EUTROPIAN about the Observatory Case template and methodological support document, identifying a number of transferability factors to take into account while developing the OCs.
- UBER and UGENT will join EUTROPIAN and other partners in giving feedback to the first, second and third round of Observatory Case Studies and videos by M11 (April 2019), M14 (July 2019) and M17 (October 2019). Between M13 (June 2019) and M24 (May 2020), UBER will synchronise the variables between the research done in WP1 and WP2, coordinating communication and exchange with UNEW and EUTROPIAN. UGENT will provide methodological support for the analysis.
- Between M18 (November 2019) and M24 (May 2020), UBER will complete the transferability analysis.

d. specific measures for key deliverables

Each key deliverable is produced in cooperation with various contributing partners following a specific timeline and cooperation process. In addition, each key deliverable has a reviewer organisation that gives feedback to the task leaders and contributing partners, thus creating

an internal evaluation process. These feedbacks also nourish the discussion of later deliverables.

2. Responsibilities and expectations from the partners

a. WP and Task leaders' role

EUTROPIAN coordinates the WP and the tasks and deliverables are distributed among other task leaders with well-defined input from contributing partners. EUTROPIAN defines the detailed Work Plan for the whole WP (M3, August 2018) and coordinates with task leaders about the proceedings of the various WPs. Task leaders oversee their own tasks and deliverables and coordinate with the WP leader EUTROPIAN in order to create a coherent WP with well-connected tasks and deliverables.

b. internal communication channels

WP2 leader EUTROPIAN, task leaders and the contributing partners will have regular communication about the proceedings. A monthly Webex call will help keeping all contributing partners updated and regular email exchange will assure the continuous flow of information. A Gdrive folder will enable the parallel editing of shared documents and a Dropbox folder will store all the documents necessary for the partners' work.

c. outlining the work in the tasks where there are no direct deliverables (Important for WPs 3 and 4 specially)

There are direct deliverables in all WP2 tasks.

d. connecting the work done in the tasks with no direct deliverables to the actual deliverables in the WP (Again, important for WPs 3 and 4)

There are direct deliverables in all WP2 tasks.

3. WP communication

a. what communication channels will be used and how

The most important communication channel of WP2 will be the project website including the complex database (Task 2.3) where all Observatory Case Studies will be published and positioned in a map. OCs will be searchable according to a variety of criteria defined in Task 2.3 and will be connected to a variety of findings of WP1 and WP3. Besides the project

website, social media channels like Facebook, Twitter and Instagram will be used to communicate the findings of Task 2.1, particularly the video reports (D2.3).

b. what will be the regular reporting schedule within the WP

Besides the monthly Webex exchange, WP2 internal reporting schedule will follow the work structure outlined in 1.c.

- In M6 (November 2018) feedback will be given to EUTROPIAN by contributing partners about the Observatory Case template and methodological support document, including LUISS, the CENTER FOR URBAN HISTORY and UBER, whose feedback will serve as a plan for their own deliverables (OC Comparative Analysis, Complex Database and OC Transferability Report, respectively).

- By M10 (March 2019), a first round of Observatory Case Studies and corresponding videos will be produced by EUTROPIAN and all contributing partners.

- By M13 (June 2019), a second round of Observatory Case Studies and corresponding videos will be produced by EUTROPIAN and all contributing partners.

- By M16 (September 2019), a third round of Observatory Case Studies and corresponding videos will be produced by EUTROPIAN and all contributing partners. By M18 (November 2019) all Individual Observatory Case Studies will be completed and a Summary Report will be produced.

- By M18 (November 2019), once all the OC video reports are produced, a detailed plan will be presented by the selected videomaker to frame the videos into a coherent narrative. By M18 (November 2019), once all the OC Studies are produced, LUISS will present a plan to finalise the Comparative Analysis of OCs. By M18 (November 2019), once all the OC Studies are produced, UBER will present a plan to finalise the Transferability Report of OCs.

c. dissemination ideas: connection to WP6

Observatory Case findings will be disseminated through website posts, columns, academic papers, presentations, reports and audiovisual materials via professional and academic networks, platforms and events - and the website will be circulated among these networks. In addition, Observatory Cases will be promoted and OC Study findings will be disseminated through The OpenHeritage Policy Briefs, the Informed Cities Forum conference, OpenHeritage Dialogues, national workshops and CHL events. In these occasions, OC findings will be provided by EUTROPIAN and WP2 contributing partners to WP6 leader ICLEI.

4. WP specific concerns

- a. outline some of the major risks and the possible mitigation measures for the experimental WPs (2 and 4)

- b. connections to other WPs – what are the most important inputs needed from the others and when

WP2 will be elaborated in close connection with WP1, WP3 and WP4. By M4 (September 2018), a survey will be produced to collect input from the Cooperative Heritage Labs leaders about the main challenges they will likely to face during the implementation of the CHLs.

Tasks and deliverables	Risks	Solutions proposed
T2.1 Anthropological analysis of individual OCs	Some Observatory Cases no longer work, they are not accessible or their protagonists do not want to be part of the research.	We need to keep some flexibility in adjusting the list of OCs and have some B options for OCs.
D2.1 Detailed Work Plan for WP2	The summer months of M1-3 did not favour partnership communication and therefore some elements of the work plan might not correspond entirely to the partners' capacities.	We need to keep some flexibility in adjusting the work plan according to needs emerging later in the project.
D2.3 Video reports of the OCs	Some partners are not experienced with the format of video.	EUTROPIAN will provide video support and advice, as well as occasional availability from its videomaker staff.
T2.2 Comparative analysis of OCs	Observatory Cases might seem incomparable because of their different geographical, architectural, socio-economic or policy context.	Partners with OC Studies in their task list need to coordinate closely with each other, LUISS and other partners about the criteria and categories of comparison.
T2.3 Complex database development	Partners have different visions and experiences of database building and this might create different expectations concerning T2.3	T2.3 needs close coordination and specific group work among the relevant partners.
T2.4 Embedded transferability analysis	Observatory Cases might seem unique and dependent on their specific contexts and therefore not transferable.	Particular attention needs to be paid to the context-dependent elements of OCs versus the reproducible (or already reproduced) models behind them.
Connection to other WPs	With WP1, WP2 and WP4 starting in parallel, there is a risk that they will not be connected enough and that WP1 and WP2 do not serve CHLs.	OC Studies will need to take into account the precise needs and challenges of CHLs, in order to focus on the right elements of heritage reuse. Similarly, the connection with WP1 will have to follow the needs and requirements of CHLs.

These challenges include regulatory, policy, social, environmental, economic, etc. issues. This survey will provide information to be fed into WP2 and help focus the case studies on the most important issues that CHLs face. Similarly, the survey's results will also shape the focus of WP1, putting in the centre of the research the policy areas most relevant for CHLs. In M13,

WP2 findings will be provided to CHLs, and will be incorporated in the implementation of WP4.

5. Literature review

- a. list some important documents, literature, etc. that can be useful for all WP partners to look at

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Babić, D. (2015). Social Responsible Heritage Management - Empowering Citizens to Act as Heritage Managers. *Procedia - Social and Behavioral Sciences*, 188(C), 27-34.

Bullen, & Love. (2011). A new future for the past: A model for adaptive reuse decision-making. *Built Environment Project and Asset Management*, 1(1), 32-44.

Culture for Development Indicators. Source:

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Dyson, K., Matthews, J., & Love, P. (2016). Critical success factors of adapting heritage buildings: An exploratory study. *Built Environment Project and Asset Management*, 6(1), 44-57.

Dudek, Iwona, and Jean-Yves Blaise. What Comes before a Digital Output? Eliciting and Documenting Cultural Heritage Research Processes. St. Louis: Federal Reserve Bank of St Louis, 2017. ProQuest. Web. 22 Aug. 2018.

Guzmán, Paloma. (2014). Measuring Cultural Heritage within the urban context: An analysis of existing dimensions and related urban indicators. *Cities* 60 (2017), 192-201.

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