



# 'En-compass' Project Training Manual

for scoping, documenting and researching  
heritage and cultural expressions and products under threat



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# Contents

## Table of Contents

1. Introduction to the Manual.....	2
2. The ‘en-compass’ Project .....	3
3. Value of UNESCO instruments & frameworks .....	7
Table 1: Some fundamental quotes from the brochure Identifying and Inventorying Intangible Cultural Heritage.....	10
4. Ecomuseology: pillars & characteristics of the ‘ecomuseum ideal’.....	14
4.1 Brief historiography of the ecomuseum movement .....	14
4.2 Three pillars and twenty-one guidelines of the ‘ecomuseum ideal’ .....	15
Figure 1: The ‘traditional’ museum.....	15
Figure 2: The ‘ecomuseum’ .....	15
Table 2: Three pillars of the ‘ecomuseum ideal’.....	16
Table 3: Twenty-one characteristics of the ‘ecomuseum ideal’ .....	16
5. An ‘Overall Heritage Management Process Model’ that supports ‘ecomuseology’ and the documentation and safeguarding of arts, culture and heritage resources .....	21
Figure 3: The ‘overall heritage management process model’, with feedback loops running up the left had side .....	22
6. Stages of Research & Documentation in the ‘Overall Heritage Management process Model’ .....	26
Figure 4: Over-layered Physical, Biological, Economic, Social, Cultural & Political Environments .....	26
6.1 Stakeholder fieldwork strategies for scoping and identifying arts, culture and heritage resources under threat.....	28
Figure 5: The ‘four-legged stool’ as an illustration for how stakeholder groups can support the ecomuseum.....	28
6.2 Data-collection themes & templates developed in the ‘en-compass’ project .....	29
7. Models to support research and interpretation of intangible and tangible artistic, cultural and heritage resources .....	42
Figure 6: The ‘turtle’ as an illustration for the living relationship between intangible and tangible cultural heritage.....	42
Table 4: A proposed model for more detailed research and documentation on individual heritage and cultural expressions & products.....	43
Table 5: Suggested six key areas in which to frame questions in the research model .....	43
Table 6: Types of data sources to be considered to develop answers .....	44
8. Model for small community-driven exhibitions .....	45
9. ‘en-compass’ as a pilot project for placing heritage and the creative and cultural industries at the heart of sustainable development .....	57
Acknowledgements.....	58
Endnotes .....	58
Expanded Bibliography .....	58

## 1. Introduction to the Manual

The content of this training manual is the product of working closely with partners and associate partners from four different regions of the world. These regions are: Hainan Province in the People's Republic of China; Kenya and other countries in Africa; Guyana in South America; and the North East of England. The manual is divided into sections that follow a process that initially was planned as a three-year project, but which finally ended up taking five years. The processes developed from working with stakeholder groups in the four regions has been an attempt to move theory into practice as a pilot for developing similar types of projects in other communities and in other parts of the world.

The purpose of this training manual is to share experiences from lessons learned, which can hopefully be implemented in local contexts in other regions and countries.



Photograph: International 'en-compass' scoping team

## 2. The 'en-compass' Project

The 'en-compass' project, which has been funded to the amount of € 944,00.00, is the outcome of a bid submitted to the European Commission's 'Investing in People: access to local culture, protection and promotion of cultural diversity' (see Corsane & Mazel 2012; and, Corsane 2012). In the three-year project, that has finished its third year and is now entering an extension period, academics from the International Centre for Cultural and Heritage Studies at Newcastle University, along with their professional colleagues in the cultural and heritage sector, have been working with three partner organisations in other parts of the world. These partners are: the Hainan Provincial International Cultural Exchange Centre (HPICEC); the Centre for Heritage Development in Africa (CHDA), which is based in Kenya and has a remit for the Anglophone countries of Africa; and, the Iwokrama International Centre for Rainforest Conservation and Development (IIC) in Guyana, South America. In this project the four partners have been working with a range of different stakeholder representatives and shareholder groups on the identification, documentation and communication of heritage and cultural expressions and products under threat from modernisation and globalisation. Over the three years, the project has centred on cultural exchanges, capacity building, training, and public awareness campaigns. It has also paid particular attention to the heritage and cultural expressions and products of indigenous peoples and ethnic minority nationalities.

The design of the project as a whole has been based around the: 2001 *Universal Declaration on Cultural Diversity*; the 2003 *Convention for the Safeguarding of the Intangible Cultural Heritage*; and, the 2005 *Convention on the Protection and Promotion of the Diversity of Cultural Expressions*. The intellectual framework for the project has been provided by the 'ecomuseum ideal'. The project has aimed to be people-centred and to focus on working with ethnic minority communities in the processes of documenting and researching heritage resources under threat from globalisation and modernisation. It has encouraged people to consider using the 'overall heritage management process model' to safeguard heritage resources *in situ*.

In the first year of the 'en-compass' project, three participants from each of the four countries were selected to take part. In the selection process, each partner was recommended to choose a visual artist, a performing artist and a heritage practitioner within their team of three – preferably with representation from ethnic minority cultures.

The final team of twelve people (three from each country) came together in October 2010 for an initial week-long workshop held in Newcastle upon Tyne in the North East of England, United Kingdom. During this workshop the twelve considered and discussed the range of areas of heritage or cultural and creative expressions and products under threat in their home countries. In this process, six main cross-cutting areas were identified by the team. These were: arts, crafts and traditional skills; language; poems and stories; traditional ceremonies and rituals; and, music and dance. The team thought about how these cultural heritage resources could be documented and recorded and shared experiences of safeguarding work done in their countries. They discussed what needed to be done in terms of documentation and what documentation fields should be included in an online database of essential selected examples within these six areas identified. At the workshop consideration was also given to how the

general public could be made more aware of the value of cultural and heritage resources under threat and how to promote the safeguarding of them.

Following this initial workshop in Newcastle, the team of twelve participants travelled to each of the three non-UK countries in turn between October and December 2010 to participate in in-country scoping workshops that were each two weeks long. During each of these two-week workshops the team observed and researched cultural heritage expressions and products *in situ* and started the processes of scoping and documenting them. From their feedback, a database documentation template, with 26 data fields in each of the six areas was created and distributed (see section 6.2 of this manual for more detailed information and explanations of the template)

A target was set to record fifteen examples of heritage and/or cultural expressions and products under threat from each country. These have provided the initial entries for an online database in the six areas and a website was constructed to provide a public interface for, and promote, the 'en-compass' project (see Figure 1). Fifteen examples have been documented from each country and these have been prepared and translated for the online database.



Photograph: The 'en-compass' project website

In addition, it was planned that the fifteen examples from each country prepared for the online database would become the content for a travelling exhibition that will be mounted in each country for a short period of time, with a set of exhibition panels (see section 8. of this Manual for more details) that will be retained by the in-country partners in: Hainan Province People's Republic of China; Kenya in Africa; and, Guyana in South America. It is the intention that both these activities will help to raise people's awareness in the partners' countries of the need to scope and document heritage, cultural and creative expressions and products under threat.

It was also intended that these first-year activities would provide the initial framework for 'cascading' and 'snowballing' the processes and tools to others so that the activities of scoping and documenting of heritage, cultural and creative resources would be further promoted. To help with this 'cascading' and 'snow-balling', the second year of the project focused on the

design and running of two-week in-country training workshops. At these in-country workshops there was a facilitator from the International Centre for Cultural and Heritage Studies at Newcastle University and input from the partner organisations and the three first-year participants. Each of these workshops aimed at training a further fifteen people in the scoping, documentation and research processes and tools originally developed in the first year. In addition, these workshops were used to introduce: international and national policy and legislation frameworks; the 'ecomuseum ideal'; the 'overall heritage management process model'; issues related to heritage management, and the role of heritage interpretation in education and sustainable heritage tourism.

In the third year of the project the partner organisations in the three non-UK countries were each offered up to three fully funded scholarship places for the Master of Arts in Heritage Studies programme at Newcastle University. This was to ensure the long-term sustainability of the project and to continue promoting the 'cascading' and 'snow-balling' affect. The partners in each country were invited to select candidates to apply for these scholarships and the nine students started the MA in Heritage Studies in August 2012.

Finally, it is planned that the 'en-compass' travelling exhibition will be completed soon and will start its programme of travelling between the different partner countries of the project. In relation to the heritage and culture of indigenous and minority peoples, the exhibition and website should help to raise public awareness – both in each country itself and more widely internationally – of the importance of safeguarding and promoting traditional cultural practices, expressions and products. The exhibition has also been designed and scripted in a way that provides examples that should encourage ordinary people to get involved in documenting their own everyday lives in order to affirm their own cultures and identities.

It is hoped that the 'en-compass' project will help to inspire people to get involved in ecomuseum-like documentation projects that are ongoing. In these projects people can be encouraged to use approaches like the integrated 'overall heritage management process model' to safeguard and promote their local heritages (see Section 5, pages 21-25).

In ecomuseum-like documentation projects, those people involved sometimes find it difficult to see the relationships between intangible and tangible heritage resources. Here the illustration of the 'turtle' (see Figure 6, page 42) can be a useful image to help explain the close relationship. In a similar way, people sometimes find it difficult to understand the importance of involving the different 'stakeholder' groups. To explain this, the illustration of the 'four-legged stool' (see Figure 5, page 28) can be useful image. The final part of the paper will focus on these two illustrations

The aim of this Training Manual is to explore whether, or not, the 'ecomuseum ideal' has potential for being used for the safeguarding and promotion of tangible and intangible products and expressions under threat, within the larger processes of sustainable development and responsible tourism. To achieve this aim, the training manual is divided into nine interconnected sections. Following this current section, Section 3 of the manual notes key UNESCO declarations, conventions, guidelines, frameworks and tools that support its member states in: valuing cultural diversity; promoting the integrated management of intangible culture heritage; facilitating the growth of cultural and creative industries; and, placing culture at the centre of sustainable development. Section 4 briefly places the origins and spread of the ecomuseum movement internationally and then introduces and reviews the three pillars and twenty-one

characteristics of the ‘ecomuseum ideal’. In Section 5, a proposed ‘overall heritage management process model’ that is complimentary to the ‘ecomuseum ideal’ is introduced. This model might assist in the practical application of the ideal, as it covers the core features and measures for safeguarding intangible cultural heritage through the activities of identification, recording, research, documentation, preservation, preventative conservation, communication, transmission and interpretation. Section 6 covers looking at the necessary stages of research and documentation in more detail and emphasises the importance of including all stakeholders in the research and documentation processes and activities. In Section 7, a proposed model for doing more detailed research into individual intangible and tangible artistic, cultural and heritage resources is introduced and explained. Section 8 then provides the ‘en-compass’ travelling exhibition is provided as an example of what can be produced for small community-driven displays.

This Training Manual has further developed some ideas first presented during 2005 at the *Communication and Exploration: International Ecomuseum Forum, Guizhou, China* (Corsane 2006a&b). It will also take into account some reflections following a research trip to Hainan in 2008 (Corsane & Tawa 2008). It will further explore some ideas presented after a fieldtrip to the North Rupununi in Guyana, South America in 2009, when an ecomuseum was proposed for the area Corsane 2009; Brooke Lang, Edwards & Corsane 2009). These ideas were further developed in the activities undertaken through the ‘en-compass’ project, which started in 2010 (Corsane & Mazel 2012). Finally, it draws on: papers presented by Corsane (2012 & 2013) at the 3<sup>rd</sup> and 4<sup>th</sup> ‘International Cultural Trade Forum’ hosted in partnership by Beijing International Studies University and Newcastle University; and, the paper presented by Corsane & Zheng (2013) in October 2013 at the ‘The International Academic Conference of Safeguarding of Traditional Li Techniques: Spinning, Dyeing, Weaving and Embroidering’ in Hainan.



Photograph: *Li* traditional textile foot-loom weaving, Hainan Province, China



### 3. Value of UNESCO instruments & frameworks

With any initiatives towards the safeguarding of traditional indigenous peoples' cultural practices and lifestyles, it is important to keep in mind the relevant normative instruments, frameworks, guidelines and tools of UNESCO, along with the particular State responses to these in the home country where the safeguarding project or activities are being undertaken. It is also essential to know, and take account of, any State legislation or regulations regarding the protection and safeguarding of tangible and intangible cultural heritage. Central to UNESCO's current views to global cultural affairs is the recommendation that heritage and culture can – and should – be seen as being central to sustainable development policies and projects in general. Also, in addition, it is vital to be aware of the strategic role that heritage and culture can play in responsible tourism that is of benefit to all concerned in the home country. This is of particular relevance where the State has national and local tourism declarations, legislation, regulations and initiatives, which can be drawn upon in support of the protection and safeguarding of tangible and intangible heritage resources. The position of UNESCO can easily be reviewed by visiting the organisation's website (see also Corsane 2013). Any quotes included below are drawn from material directly presented online at the UNESCO website, or made accessible through it (UNESCO 2013).

When looking at the home webpage of the UNESCO theme 'Protecting Our Heritage and Fostering Creativity', it is immediately noticed how UNESCO views the benefits of linking heritage, culture, creativity and sustainable development activities together. UNESCO states that:

**"Heritage constitutes a source of identity and cohesion for communities disrupted by bewildering change and economic instability. Creativity contributes to building open, inclusive and pluralistic societies. Both heritage and creativity lay the foundations for vibrant, innovative and prosperous knowledge societies".**

UNESCO goes on to say that its strategy will be to encourage:

"on the one hand incorporating culture into all development policies, be they related to education, science, communication, health, environment or cultural tourism and, on the other hand, at supporting the development of the cultural sector through creative industries" (UNESCO 2013).

These statements act to bring together a number of UNESCO's undertakings, especially those validated since the start of the new millennium, as an articulated package under the theme of 'Protecting Our Heritage and Fostering Creativity'. Since before 2000, UNESCO has helped its member states by working with them in the development of a series of normative instruments including: the 2001 *Universal Declaration on Cultural Diversity*; the 2003 *Convention for the Safeguarding of the Intangible Cultural Heritage*; the 2005 *Convention on the Protection and Promotion of the Diversity of Cultural Expressions*; and, the 2013 *Hangzhou Declaration: Placing Culture at the Heart of Sustainable Development Policies*. Together as a suite, the declarations and conventions help to focus attention on the value of heritage, culture and creativity in the linked recognition of cultural diversity and in planning for sustainable development. When considered together, they can provide useful guidelines for ways forward in safeguarding peoples' traditional cultural life-ways, expressions and products. This might most easily be implemented through an informed use, adaption, or total reworking of the 'ecomuseum ideal' in a way that is appropriate in different countries and their particular heritage, arts and culture stakeholder and shareholder groups. In practical terms, the implementation of the proposed

‘overall heritage management process model’ (see Section 5, pages 21-25) may be worth consideration.

When looking at each of these declarations and conventions in turn, there are a couple of central features in each that warrant noting before moving on to review the ‘ecomuseum ideal’ and introduce the ‘overall heritage management process model’. Here the English texts have been used and it is realised that there may be variance in meanings in places against the Chinese versions.

Starting with the 2001 *Universal Declaration on Cultural Diversity* it is noted in ‘Article 1 - Cultural diversity: common heritage of humanity’ that:

“Culture takes diverse forms across time and space. This cultural diversity is embodied in the uniqueness and **plurality of the identities** of the groups and societies making up humankind.

As a **source of exchange, innovation and creativity**, cultural diversity is as necessary for humankind as biodiversity is for nature. In this sense, it is the common heritage of humanity and should be recognised and affirmed for the benefit of present and future generations” (UNESCO 2001).

In the English version it is important to note that cultural diversity can be viewed “as a source of exchange, innovation and creativity”. In ‘Article 3 - Cultural diversity as a factor in development’ it is stated that:

“Cultural diversity widens the range of options open to everyone; it is **one of the roots of development**, understood **not simply in terms of economic growth**, but also as a means to achieve a **more satisfactory intellectual, emotional, moral and spiritual existence**” (UNESCO 2001).

Turning to the 2003 UNESCO *Convention for the Safeguarding of the Intangible Cultural Heritage*, the connection between concepts contained in it and the notions of valuing cultural diversity in the 2001 Declaration are made clear. People’s identities and cultural diversity are often most clearly reflected in the intangible cultural heritage expressions of the different cultural groups. Safeguarding intangible cultural heritage to endorse cultural diversity is important, especially as people are confronted by the challenges and threats of globalisation, modernisation and urbanisation. UNESCO provides a useful resource in the ‘infokit’ series of eight short brochures, which are a “basic reference and pedagogical instrument for promoting and ensuring an effective understanding of intangible cultural heritage and the 2003 Convention by governments, communities, experts, concerned UN agencies, NGOs and interested individuals”. These eight brochures first published in September 2009 for the 4<sup>th</sup> Session of the ‘Intergovernmental Committee for the Safeguarding of the Intangible Cultural Heritage’ and updated in 2011 are all obtainable at:

<http://www.unesco.org/culture/ich/index.php?lg=en&pg=00451>. The titles of the eight brochures are as follows.

1. *What is Intangible Cultural Heritage?* (ICH 2011a)
2. *The Convention for the Safeguarding of the Intangible Cultural Heritage* (ICH 2011b)
3. *Implementing the Convention for the Safeguarding of ICH* (ICH 2011c)
4. *Working towards a Convention* (ICH 2011d)
5. *Questions and Answers* (ICH 2011e)
6. *Identifying and Inventorying Intangible Cultural Heritage* (ICH 2011f)

7. *Intangible Heritage Culture Domains* (ICH 2011g)

8. *Fact Sheet* (ICH 2011h)

In relation to ‘safeguarding’ intangible cultural heritage, the second booklet on *Implementing the Convention for the Safeguarding of ICH* reminds the reader early on when considering definitions that:

“ ‘Safeguarding’ is defined in the Convention as ‘measures aimed at ensuring the viability of the intangible cultural heritage, including the **identification, documentation, research, preservation, protection, promotion, enhancement, transmission**, particularly through formal and non-formal education, as well as the *revitalisation* of the various aspects of such heritage’ ” (ICH 2011c:4 quoted from Article 2.3 of the 2003 Convention).

This quote, with its list of measures and activities, has synergies with the ‘ecomuseum ideal’ outlined in Part 3 of this paper in terms of the ideal’s emphasis on community participation and ownership in the processes of ongoing documentation, preservation and communication of heritage and cultural resources *in situ*. It also supports the proposed ‘overall heritage management process model’ presented in Part 4 of this paper. All of the measures and activities are represented in the model.

In relation to the aims of this training manual, maybe the most useful brochure out of the eight is the one entitled *Inventorizing Intangible Cultural Heritage*. The overall themes of the brochure emphasises community participation in safeguarding processes and the reader gets a sense that good ‘safeguarding’: focuses on the importance of involving the communities at every point of the processes; endorses safeguarding without ‘freezing’ culture and locking people in time; upholds the central involvement of tradition bearers [transmitters] and practitioners; and, suggests the development of on-going processes of documentation activities to chart change over time. As one reads through the brochure, a number of passages state prime ideas that resonate with what will be presented in Parts 3 and 4 of this paper. These passages have been pasted as quotes into Table 1 over page. It may be useful to keep these statements in mind and link them to what is presented in the rest of the paper.



Photograph: International ‘en-compass’ scoping team in Kenya

Table 1: Some fundamental quotes from the brochure Identifying and Inventorying Intangible Cultural Heritage

<p>“The Convention focuses on the role of communities and groups in safeguarding intangible cultural heritage. It is <b>concerned with processes and conditions rather than products</b>, placing emphasis on <b>living heritage</b> that is performed by people, often collectively, and communicated through living experience. It deals with heritage <b>that communities themselves deem important</b>, and strives to contribute to the <b>promotion of creativity and diversity</b>, and to the well-being of communities, groups, and society at large” (ICH 2011f: 3).</p>
<p>“To be kept alive, intangible cultural heritage must be relevant to its community, continuously recreated and transmitted from one generation to another. There is a risk that certain elements of intangible cultural heritage could die out or disappear without help, but <b>safeguarding does not mean fixing or freezing</b> intangible cultural heritage in some pure or primordial form” (ICH 2011f: 4).</p>
<p>“to a large extent, any safeguarding measure refers to strengthening and reinforcing the diverse and varied circumstances, tangible and intangible, that are necessary for the <b>continuous evolution and interpretation of intangible cultural heritage</b>, as well as for its transmission to future generations” (ICH 2011f: 4).</p>
<p>“In spite of the freedom given to States in the way they inventory intangible cultural heritage, the Convention does impose several conditions. The most important of these is the one <b>requiring community involvement</b>.</p> <p>Since communities are the ones who create intangible cultural heritage and keep it alive, they have a privileged place in safeguarding it. <b>The communities that practise intangible cultural heritage are better placed than anyone else to identify and safeguard it</b>, and therefore they should be involved when their intangible cultural heritage is to be identified through inventorying” (ICH 2011f: 5-6).</p>
<p>“<b>Documentation consists of recording intangible cultural heritage in tangible forms, in its current state, and collecting documents that relate to it.</b> Documentation often involves the use of various recording means and formats and the collected documents are often preserved in libraries, archives or websites, where they may be consulted by the communities concerned and the larger public” (ICH 2011f: 6).</p>
<p>“<b>Innovative community self-documentation efforts and programmes</b> to repatriate or disseminate archival documents in order to encourage continued creativity are some of the proven safeguarding strategies increasingly being used” (ICH 2011f: 6).</p>
<p>“Although some States already and intensively involve communities of intangible cultural heritage bearers, <b>many inventory projects do not yet take into account the provisions of the Convention concerning communities’ involvement</b>. They were often developed by organisations and individuals from outside the communities and often were not created with the aim of ensuring the viability of intangible cultural heritage, as required in the Convention” (ICH 2011f: 6).</p>
<p>“States Parties are responsible for making <b>appropriate institutional arrangements for involving communities in the inventory-making process</b>. Such arrangements might include the establishment or designation of intersectoral administrative bodies for assessing relevant existing legislation, institutions and traditional safeguarding systems, as well as for identifying best practices and areas for improvement. Such bodies would be in charge of drawing up inventories of intangible cultural heritage, developing safeguarding policies, developing initiatives to raise awareness about the importance of intangible cultural heritage and <b>encourage public participation in inventorying and safeguarding it</b>” (ICH 2011f: 6).</p>
<p>“States Parties may also wish to establish advisory or consultative bodies that would comprise <b>practitioners and other tradition bearers, researchers, NGOs, civil society, local representatives and relevant others, as well as local support teams including community representatives, cultural practitioners and others with specific skills and knowledge</b> in training and capacity building” (ICH 2011f: 6).</p>
<p>“Methods for <b>inventorying intangible cultural heritage might be carried out in steps</b> and the identification of all <b>relevant stakeholders</b> and their involvement in the process” (ICH 2011f: 7).</p>

<p>“Inventorying should be a <b>top-down and bottom-up</b> process <b>involving local communities as well as governments and NGOs</b>. In order for States Parties to satisfy the requirement of communities’ involvement, procedures should be established for:</p> <ul style="list-style-type: none"> <li>▪ Proper identification of communities or groups and their representatives;</li> <li>▪ Ensuring that only intangible cultural heritage recognised by the communities or groups is inventoried;</li> <li>▪ Ensuring that the free, prior and informed consent of the communities or groups is obtained for inventorying;</li> <li>▪ Ensuring the consent of communities when involving non-community members;</li> <li>▪ Respecting customary practices regarding access to intangible cultural heritage;</li> <li>▪ Actively involving local or regional governments;</li> <li>▪ Adopting and following a code of ethics that should take into account the lessons learnt from good practices worldwide” (ICH 2011f: 7).</li> </ul>
<p>“<b>Inventories can never be completed or fully updated</b> because of the immense scope of the heritage covered by the Convention and the fact that <b>intangible cultural heritage is constantly changing and evolving</b>” (ICH 2011f: 8).</p>
<p>“Inventories <b>must be regularly updated</b>, as stated in Article 12 of the Convention. This is vital due to the fact that <b>intangible cultural heritage constantly evolves</b> and threats to its viability can emerge very rapidly. Many national inventories already contain elements that no longer exist while others include information on practices that have substantially changed” (ICH 2011f: 8).</p>
<p>“There is <b>no minimum age</b> for how long practices need to be established and transmitted between generations in order for them to be considered elements of intangible cultural heritage under the Convention. Some States impose such a requirement on elements to be inventoried, and these range from two or three generations up to seven... Since the community itself should decide what it recognises as its intangible cultural heritage, imposing a uniform, external age limit seems to contradict the Convention” (ICH 2011f: 12).</p>
<p>“<b>Particular attention should be given to rapid evolutions with significant impact from external factors: while they may have their roots in traditional intangible cultural heritage elements, they may not always be seen as resulting from an uninterrupted chain of development. Some inventorying systems do not include revitalised elements where there has been such a break; others choose to include them if they are recognised by a community as its heritage</b>” (ICH 2011f: 12).</p>
<p>“Above all, the elements that feature in inventories of intangible cultural heritage should be <b>selected on the basis of the primary criterion of whether they are recognised by one or more communities, groups or, in some cases, individuals as being expressions of their cultural identity</b>. The Convention requires that inventorying be done with the participation of those very communities” (ICH 2011f: 14).</p>

The 2001 Declaration and the 2003 Convention are important instruments, but should not be considered in isolation, as the 2005 *Convention on the Protection and Promotion of the Diversity of Cultural Expressions* adds even further dimensions that need to be drawn into the processes of safeguarding and promotion of heritage and culture. With all three instruments there are now further synergies that need to be considered in order to balance the safeguarding of heritage, while at the same time promoting and supporting the rapidly emerging cultural and creative industries, which in the case of China have increasing significance in the creation of economic, social and cultural capital. The opening webpage on the 2005 Convention states that:

“This legally binding international treaty ensures that artists, cultural professionals and practitioners, as well as citizens can create, produce, disseminate, and enjoy a broad range of cultural goods, services, and activities, including their own. It supports mechanisms that foster creativity and the emergence of dynamic cultural and creative industries as a tool for inclusive economic and social development, including those that

foster local production, the development of local markets and access to platforms for their distribution/exchange worldwide.

Cultural expressions are based on the cultural and creative industries which are one of the fastest growing industries in the world and have proven to be a viable development option, drawing on a unique and renewable resource, human creativity. The potential of these industries is at the heart of the 2005 UNESCO *Convention on the Protection and Promotion of the Diversity of Cultural Expressions*".

How do the 2003 and 2005 Conventions relate to each other, as the first focuses more on safeguarding cultural traditions while the second appears to promote creativity and cultural innovation? Are they then compatible? In relation to traditional cultural expressions and products, the 2003 and 2005 Conventions may seem at first glance to be at odds with each other in the options that they could be offering. On the one hand the 2003 Convention emphasises the long-term viability and continuity of the intangible cultural heritage elements of the traditional techniques, whilst on the other hand the 2003 Convention appears to encourage more of a dynamic, creative and adaptive use of cultural practices that hints at certain breaks from tradition in developing new contemporary products. However, is this apparent dichotomy a problem? Is safeguarding traditional techniques and products divergent to being free to be creative and forward-looking in the use of cultural capital? Are these two contradictory positions, and are they mutually opposed? Personally, it is believed that they are not necessarily in opposition and that the one can lead fairly seamlessly into the other. However, each – and the meeting point between them – needs to be carefully balanced and managed. Intangible cultural heritage can be both safeguarded, whilst at the same time providing the inspirational and artistic elements for appropriate contemporary adaptation in the cultural and creative industries. With a careful balance, it may be possible to both safeguard and to allow for creative innovation. The 'ecomuseum ideal' and the 'overall heritage management process model' can allow for both, with their central concerns for ongoing documentation and research to record change in traditions and culture over time.

The potential impact of UNESCO's influences in relation to heritage and culture does not end with the above instruments themselves, as they have become part of a fuller 'package'. UNESCO now presents this package on its website under the theme of 'Protecting Our Heritage and Fostering Creativity', where heritage and culture have been aligned centrally to sustainable development. Having visited the UNESCO website over a number of years, it is interesting to see how it has developed and is now restructured following some recent formative events including the:

- UNESCO: '*World Forum on Culture and Cultural Industries*' (Monza, September 2009);
- Symposium on '*Culture and Development: a response to the challenges of the future?*' (Paris, October 2009);
- UN Conference on Sustainable Development on '*The Future We Want*' (Rio de Janeiro, June 2012);
- Symposium on '*Funding Culture: Managing the Risk*' (Paris, April 2010); and,
- International Congress on '*Culture: Key to Sustainable Development*'. (Hangzhou, May 2013).

Information on each of these events is provided online on the UNESCO website and readers of this paper are encouraged to look at this to see the continuing discussion and actions that have occurred around placing culture at the heart of development. The most recent event listed above resulted in the drafting of the 2013 *Hangzhou Declaration: Placing Culture at the Heart of Sustainable Development Policies*. In relation to the 'en-compass' project, it may be fitting to draw your attention to a passage within the preamble of the Declaration, which states:

“We reaffirm that **culture should be considered to be a fundamental enabler of sustainability**, being a source of meaning and energy, a **wellspring of creativity and innovation**, and a resource to address challenges and find appropriate solutions. The **extraordinary power of culture to foster and enable truly sustainable development** is especially evident when a **people-centred** and **place-based** approach is integrated into development programmes and peace-building initiatives.

We also reaffirm the potential of **culture as a driver for sustainable development**, through the specific contributions that it can make – as **knowledge capital** and a sector of activity – to inclusive **social, cultural and economic development**, harmony, **environmental sustainability**, peace and security” (UNESCO/Hangzhou International Congress 2013: 2).

Finally, in addition to the above instruments and framework, UNESCO has some other tools that are available online and which may be useful when considering activities to safeguard and promote traditional cultural heritage expressions and products, within the frameworks of sustainable development and responsible tourism. These are the:

- Culture and Development website  
<http://www.unesco.org/new/en/culture/themes/culture-and-development/>
- Toolbox for Cultural Policies  
<http://www.unesco.org/new/en/culture/themes/culture-and-development/the-cultural-diversity-lens/toolbox-for-cultural-policies/>
- Cultural Diversity Lens  
<http://www.unesco.org/new/en/culture/themes/culture-and-development/the-cultural-diversity-lens/>
- UNESCO and Indigenous Peoples Partnership for Cultural Diversity  
<http://www.unesco.org/new/en/culture/themes/culture-and-development/unesco-and-indigenous-peoples-partnership-for-cultural-diversity/>

This training manual now turns to introduce the ‘ecomuseum ideal’, which, as will become apparent, shares many features similar to those promoted through the key UNESCO instruments and frameworks outlined above.



Photograph: International ‘en-compass’ scoping team in Hainan Province, China

## 4. Ecomuseology: pillars & characteristics of the 'ecomuseum ideal'

Museums that have followed the traditional approaches to collection, conservation and interpretation that developed through the 19<sup>th</sup> and early 20<sup>th</sup> Centuries faced many new challenges from the 1960s, which are currently even more pressing. Bound by certain philosophical frameworks and accepted techniques, these museums did not always find it easy to re-shape themselves to meet the needs of changes in society. In contrast, integrated museology, ecomuseology, community museology and 'holistic museology' (Corsane & Holleman 1993: 121-2; Davis 1996: 123-4; Davis 1999: 15-17; Davis 2011: 19-20; and, also see Van Mensch 1993b: 61) have been more flexible, people-centred, context-focused and all-encompassing in terms of recognising the full range of intangible and tangible (both immovable and movable) heritage resources. This means that these approaches to museology have been more able to adapt to societal, environmental and economic imperatives for change. Out of the museum and heritage professionals who have followed these forms of 'new museology', those in the ecomuseum movement have been amongst the more radical. Although not everyone has been comfortable with the term 'ecomuseology', it has produced a philosophical standpoint to heritage management that appears to be appropriate in many contexts in today's world.

In this part of the paper the origins and spread of the ecomuseum movement internationally (see Davis 1999; and, Davis 2001) and its introduction to the People's Republic of China will be stated (see Su 2005; 2008). The three pillars and twenty-one characteristics of the 'ecomuseum ideal', as they appear in western countries, will then be reviewed.

### 4.1 Brief historiography of the ecomuseum movement

The origins of the 'ecomuseum' movement began in France with Georges Henri Rivière and Hugues de Varine. Initially in the late 1960s these two men each introduced one main catalyst to museology which when combined became the foundation of the ecomuseum philosophy. On the one hand Rivière believed that museums should do more to place peoples' social and cultural activities into broader environmental contexts, while on the other de Varine wished to see museums become more democratic, with local communities taking a more active role in the processes of heritage management. However, the ecomuseum movement was not the only new shift, or movement, in museology and heritage management taking place in the second part of the 20<sup>th</sup>-century. There were a number of earlier and concurrent influences in different countries that were feeding into the emergence of what has broadly been termed 'new museology', which has continued to swell and evolve since the 1960s to challenge the traditional museum and western approaches to heritage management (see Davis 1999: 45-62; or, Davis 2011: 50-68).

The ecomuseum movement was part of this budding 'new museology' and its direct roots can be traced back to 1967 when the system of French Regional Nature Parks was established (Corsane 1993: 113). Through the museum experiments and heritage projects which developed out of this programme, the ideas of Rivière and de Varine began to be implemented. However, the actual term *écomusée* was first used in 1971 by Robert Poujade, then French Minister of the Environment. After discussions with Rivière and de Varine on the state of museums in France, Poujade used the term with the basic philosophy in a speech he gave at the 9th General



Conference of the International Council of Museums. In January 1972 work began on the development of the Museum of Man and Industry which centred on the two urban communities of Le Creusot and Montceau-les-Mines in the Province of Burgundy in France. Comprised of 500 square kilometres of territory, with both industrial and rural areas, this was viewed as the model ecomuseum during its prime (Corsane 1993: 113). For a little over a decade it stood out as an exemplary for the movement, which from the 1980s spread to other countries including mainly Canada, Sweden, Norway, Italy, Portugal, Brazil, Spain, Mexico, Japan, China and Vietnam.

## 4.2 Three pillars and twenty-one guidelines of the ‘ecomuseum ideal’

Before introducing and considering the three pillars and twenty-one characteristics that have been proposed in an attempt to understand the ecomuseum ideal, it is useful to start with a basic appreciation of the differences between the ‘traditional’ museum and the ecomuseum. These differences have been very concisely illustrated in a pair of equations developed by Hugues de Varine and which were added to by the Canadian museologist René Rivard (1984: 43-53; 1988: 123-4; and, also see Boylan 1992a: 29; Davis 1999: 69; 2011: 82; Corsane 2006a: 404; 2006b: 159; 2006c: 109; 2006d: 219; Corsane, Davis & Murtas 2009: 52). These equations are stated as follows:

- *Traditional Museum = building + collections + expert staff + public visitors; and,*
- *Ecomuseum = territory + heritage + memory + population.*

These equations have also been presented diagrammatically (Rivard 1984: 44 & 53; Davis 1999: 72-3; and, Davis 2011: 82-3). Depictions of the ‘traditional’ museum (Fig. 1) and the ‘ecomuseum’ (Fig. 2) are presented below. (Representations of these with the Chinese characters can be found in Corsane 2006b: 55.)

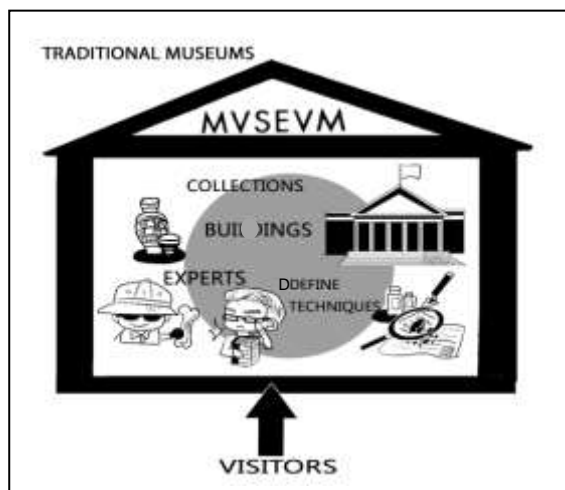


Figure 1: The ‘traditional’ museum

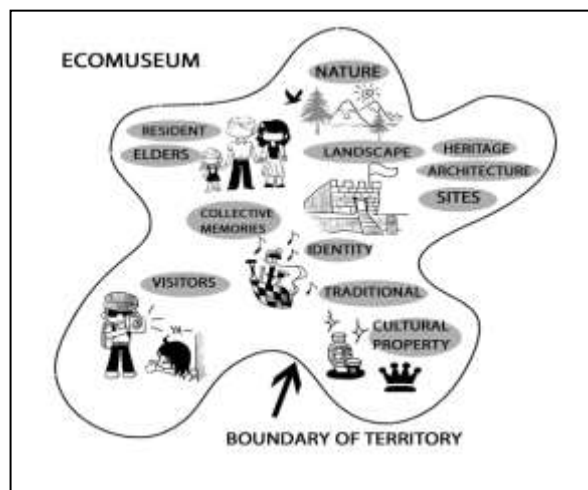


Figure 2: The ‘ecomuseum’

With this basic understanding of the differences between the traditional museum and the ecomuseum in place, one can delve deeper into the philosophy and practices of ecomuseology. To begin with, it is suggested that the ‘ecomuseum ideal’ has three major pillars (see Table 2) at the heart of its philosophy.

Table 2: Three pillars of the 'ecomuseum ideal'

1.	The 'ecomuseum ideal' focuses on the <b><i>sense and spirit of place</i></b> – through a holistic approach to the integrated management of natural and cultural and tangible and intangible heritage resources within their original and over-layered physical, natural, economic, social, cultural and political environments.
2.	The 'ecomuseum ideal' facilitates <b><i>'stakeholder' involvement</i></b> and joint-ownership of the processes and products – where the stakeholders with invested interest may include in certain countries: government bodies at different levels; community groups and representatives, including tradition bearers and 'transmitters'; heritage management professionals and practitioners; businesses; non-government bodies; and, academic advisors and students. Another important 'stakeholder' category includes the groups of users, visitors and tourists who may visit the ecomuseum.
3.	The 'ecomuseum ideal' is not an absolute model, rather it is a <b><i>'malleable' and flexible outlook</i></b> and should be responsive to, and 'shaped' by, the specific local contexts and needs – no two ecomuseums will ever be the same or limited by the parameters of a model, as each will be unique in its response that will attempt to bring equal benefits to all 'stakeholders' involved.

In addition to the three major pillars, certain characteristics have been identified within the philosophy and practices of the ecomuseum movement internationally that tend to typify individual ecomuseums (Boylan 1992b: 30; Corsane & Holleman; 1993: 114-117; Hamrin & Hulander 1995; Davis 1999: 219-228; Corsane, Elliott & Davis 2004; Corsane 2006a: 404-405; Corsane 2006b: 159-160; Corsane 2006c: 109-111; Corsane 2006d: 219-220; Corsane *et. al.* 2007a: 105; Davis 2011: 90-94). Any list of these characteristics is likely to include variations on the twenty-one outlined below in Table 3. In this annotated list, Characteristics 1 to 6 focus on the participatory nature of ecomuseums, 7 to 12 deal with what an ecomuseum includes and covers, and 13 to 21 centre on what an ecomuseum can do and the approaches and methods often used in ecomuseology.

Table 3: Twenty-one characteristics of the 'ecomuseum ideal'

1.	Although the 'ecomuseum ideal' may be introduced as a concept by an outside agency, for example academics and/or government bodies, it is preferable that the actual ecomuseum itself should be <b>initiated and steered by local communities</b> themselves with support and input from any other 'stakeholders' groups that may have invested interest.
2.	Allow for <b>public participation from all the stakeholder and interest groups in all the decision-making processes and activities in a democratic manner</b> . Where possible, the 'ecomuseum ideal' facilitates and allows for participation of multiple 'stakeholder', shareholder and interest groups in all decision-making processes and activities, which encourages and recognises input from each of these various groups in a multi-directional manner – both vertical "top-down" and especially "bottom-up", as well as in a more horizontal exchange with input from certain stakeholder groups being seen as having equal importance whenever appropriate.
3.	It should <b>stimulate a shared multiple ownership and management system, with input from local communities, heritage management professionals and local practitioners, local businesses, local authorities and government structures, and academic advisors</b> . All of the 'stakeholder' groups need to feel a shared 'sense of ownership' over the processes, activities and the products. In relation to this, the symbolic image of the 'four-legged stool' may provide a useful visual illustration of the how the different stakeholder groups can work together to support an ecomuseum. The symbolic image of the 'four-legged stool' will be presented later in this paper.
4.	In an ecomuseum, an <b>emphasis is usually placed on the processes of heritage management, rather than simply on the heritage products for consumption</b> . Here the processes involving activities to identify, scope, record, document, research, preserve, transmit and communicate heritage elements, resources, practices, cultural products and associated contextual information are as important as the promotion of the final cultural and heritage products themselves.

5.	The 'ecomuseum ideal' <b>encourages collaboration</b> with an agreed network of partners from the different 'stakeholder' groups, which may include for example co-operation projects involving <b>local craftspeople, artists, writers, actors, musicians</b> . It is often individuals from these groups of local craftspeople and visual and performing artists who are the local tradition bearers, transmitters. Although they may have less academic qualifications, they are often the true experts and their local knowledge needs to be confirmed and affirmed and their cultural confidence re-built. At times they may feel that their particular ethnic traditional skills and knowledge has lost value in terms of cultural capital, due to the impacts of globalisation, modernisation and 'progress'. In addition, people from a particular cultural group may devalue their own heritage elements and resources when the cultural capital of another cultural group has become more dominant and desirable. This sometime leads the heritage elements and resources of an ethnic minority group being perceived as being 'primitive' when compared to the heritage of the dominant cultural group.
6.	The operations of an ecomuseum may <b>often depend on substantial active voluntary efforts by local stakeholders</b> , especially the efforts of people from the local communities. This is potentially one of the most significant characteristics for the sustainability and long-term survival of an ecomuseum – if it is not in reality the most important Characteristic to be encouraged. This is why people from the local communities need to feel empowered and have a sense of ownership in the processes of decision-making and the activities of the ecomuseum. If local people feel that the ecomuseum has been imposed on them, they are less likely to be willing to get involved. This is why the Characteristics 1, 2 and 3 are so vitally important. Here it may also be crucial to note that local people may resent being pulled away from their primary livelihood activities in order to perform ecomuseum activities. For example, local people should not be diverted from their daily subsistence and/or income generation work, or educational activities, and forced to attend or undertake activities and jobs in the ecomuseum. Potentially, this would lead to bitterness against the ecomuseum. <b>The ecomuseum should really be mainly about people presenting their heritages and cultures within the contexts of their normal daily lives and routines, rather than them feeling compelled to participate in specially (re)created extra performances devised for visitor consumption.</b>
7.	An ecomuseum focuses on the construction and <b>affirmation of local identity and a sense of place</b> . It is this characteristic that makes the 'ecomuseum ideal' so useful in working towards the reduction of the threats of globalisation, modernisation and urbanisation and their bearings on safeguarding cultural and heritage resources related to cultural diversity.
8.	It <b>often encompasses a 'geographical' territory, which can be determined by different shared characteristics</b> that may be defined, for example, by people from a particular locale who share: a specific ethnic background or cultural heritage; a set of religious beliefs; a particular economic lifestyle; or, who are working in a particular industry.
9.	An ecomuseum ideally <b>covers both spatial and temporal aspects. In relation to the temporal, it looks at continuity and change from the past through to the present, rather than simply trying to 'freeze' things in time. Therefore, its approach is diachronic rather than synchronic.</b> This Characteristic links closely to Characteristic 14 below. Ideally, an ecomuseum will not try to freeze cultural heritage resources, practices and products in one particular 'period' or 'slice through time'.
10.	The ecomuseum <b>often takes the form of a multi-site 'fragmented museum', consisting of a network with a central hub and antennae</b> of different places, spaces, sites, performance areas and buildings, within a connected web. An ecomuseum may have a centralised 'information centre' (sometimes more like a traditional museum) as the hub or 'entry point' to the web of heritage elements and resources, where people can obtain information useful to understanding the 'territory' (Characteristic 8) of the ecomuseum and its people more generally. From here, people can be encouraged to go and visit the antennae of the different places, spaces, sites, performance areas and buildings where the natural and cultural and the intangible and tangible heritage elements and resources can be engaged with <i>in situ</i> (Characteristic 11).
11.	The 'ecomuseum ideal' promotes <b>identifying, recording, documenting, researching, preserving, conserving and safeguarding intangible and tangible heritage elements, practices, expressions resources, and products <i>in situ</i> in their original environments</b> , rather than taking them and viewing them outside of their original contexts (which is often done by traditional museums and archives). When considering the <i>in situ</i> environments, it is useful to remember that they consist of organic and interconnected overlays of the physical, natural, economic, social, cultural and political environments that are in reality merged and which all impact on each other.
12.	In the ecomuseum ideal, <b>equal attention is often given to immovable and movable tangible heritage resources and intangible cultural heritage resources and expressions.</b> Examples of immovable

	<p>tangible heritage would include: natural and rural or urban cultural landscapes; fixed human-made features like transport systems, bridges, dams; archaeological sites; the built environment; gardens; memorials; etc. Movable tangible material culture would include: archival manuscripts and documents; books; artefacts; examples of calligraphy; decorative artworks; fine artworks, etc. Intangible cultural heritage would include for example: worldviews; belief systems; language and dialect; oral traditions passed on from generation to generation; oral testimonies and histories; legends; poetry; songs; music; festivals; ceremonies; rituals; traditional hand-making crafts skills; 'food-ways'; etc. The division between tangible and intangible heritage is an artificial divide. They cannot really be separated out from each other, or seen in isolation. On the one hand for example, intangible cultural heritage elements, like cultural beliefs and traditional craft skills, lie behind the production of tangible cultural heritage resources. On the other hand, intangible elements like music and dance rely on the tangible material culture of musical instruments and costumes. In relation to the unity of intangible and tangible elements and resources, the symbolic image of the 'turtle' may provide a useful visual illustration of the relationships between the two. The symbolic image of the 'turtle' will be presented later in this training manual.</p>
13.	<p>The ecomuseum <b>stimulates sustainable development and the considered use of heritage resources</b>. Where the Characteristics of the 'ecomuseum ideal' are present, there are more possibilities that ecomuseum initiatives are likely to find a balance between safeguarding heritage, while at the same time stimulating regeneration and/or economic development. However, people should not see the ecomuseum as being a short-term panacea or answer towards poverty-alleviation. There is a very delicate balance and local people should not be 'promised' that an ecomuseum will provide immediate answers to economic or social problems. If people are made these sorts of promises, they may quickly become disheartened if the ecomuseum does not appear to be delivering. Nevertheless, if it can be accepted that an ecomuseum will not provide a 'quick-fix', then the characteristics of the ideal can be seen as being in line with what UNESCO is encouraging through its Conventions and Declarations that call for heritage and culture to be more centrally placed within processes and planning for sustainable development (See the previous Section 3 of this training manual).</p>
14.	<p>It <b>allows for change and development for a better future</b>. Linking back to Characteristic 9 and not 'freezing' culture in a time capsule, an ecomuseum should ideally allow for 'progress' to continue. It should not expect local people to continue living in conditions locked in time, especially where these conditions are perceived by them to be 'backward' or lagging behind more general advancements towards progress and development. Local people are likely to become resentful if they feel that they are being forced to live in what might be perceived as 'primitive' conditions and cultural traditions and not allowed to improve their lives.</p>
15.	<p>It <b>encourages an ongoing programme of documentation of past and present life and people's interactions with all environmental factors (including physical, economic, social, cultural and political)</b>. Characteristic 15 is at the <b>very core</b> in safeguarding and promoting heritage resources, including both intangible and tangible cultural heritage elements and products. If an ecomuseum does not attempt to 'freeze' heritage within a time-capsule (Characteristic 9) and allows for change and development towards a better future for local communities (Characteristic 14), then it should encourage stakeholders to implement an ongoing programme of recording, documenting and researching in order to chart and explain the changes to the intangible and tangible heritage elements and resources over time. Here, academics and their students can play an important role and help to develop and maintain databases and collections of the intangible and tangible heritage elements and resources. They can work with local community representatives – including the tradition bearers and transmitters – and heritage practitioners to undertake the work needed in these ongoing programmes of documentation and research. In particular, cohorts of students could provide a central workforce for these activities. With this, two important things could be supported. First, it might encourage the intergeneration exchange of information, where the students would learn from the older people about the heritage elements and products and the process of transmission could take place. This might even be of more value if the students came from the same ethnic communities whose heritage elements and products were being documented and researched for the databases. Secondly, with student groups providing a workforce, the local people could continue their work with their everyday livelihoods. In theory this all seems fairly obvious, however, how can it be implemented in practice? Will students be interested in this type of work? In addition, what would an ongoing programme of documentation look like and what activities could it include? This will be considered in more detail in the next part of this paper, which will introduce a proposed model for an 'overall heritage management process model'.</p>

16.	It <b>promotes research at a number of levels</b> – from the research and understanding of local community 'specialists', tradition bearers and transmitters to the research undertaken by heritage professionals and/or academics. In traditional museology and heritage management, it has often been the academics and heritage practitioners who have taken the lead in researching the heritage elements and resources. In ecomuseology, local people – especially the tradition bearers and transmitters – should be seen as the fundamental specialists in research activities.
17.	It <b>promotes multi-disciplinary and inter-disciplinary approaches to researching heritage resources</b> . Where an ecomuseum considers all natural and cultural, intangible and tangible heritage resources together within the overlaying physical, natural, economic, social, cultural and political environments, it will encourage research from people interested in the full range of research disciplines. This means that the research can be multi-disciplinary, with researchers focusing on research related to each of the particular disciplines. It can also encourage inter-disciplinary research, where teams of researchers from different discipline backgrounds come together to undertake research. An example of this might be a research team that comes together with local community specialists and skills transmitters, botanists, chemists, ethnologists, human geographers and cultural historians to research elements of intangible cultural heritage expressions and activities, and/or, tangible cultural heritage aspects in the cultural landscapes, cityscapes, immovable heritage resources, the build environment and artifacts and cultural products.
18.	The 'ecomuseum ideal' <b>encourages a holistic approach to the communication and interpretation of nature/culture relationships and intangible/tangible heritage elements and resources</b> . As with inter-disciplinary research, the ecomuseum can stimulate a more holistic approach to communication and interpretation of the various heritage elements and resources. What makes this possible is that ecomuseums look to working with these heritage elements and resources <i>in situ</i> and within their over-layered environments (Figure 4).
19.	It often attempts to <b>illustrate connections between: nature/culture; past/present; and, individual hand-made/mechanised technologies</b> . As suggested under Characteristics 17 and 18 above, the ecomuseum can provide opportunities for researching and communicating about a range of heritage elements and resources. It can also help to illustrate the interconnectedness between all of these.
20.	The ecomuseum can <b>provide for a positive intersection between heritage management processes and responsible tourism</b> . Tourism is considered as an industry that can help in poverty-alleviation by stimulating income generation and economic development for ethnic minority communities in disadvantaged areas, especially where these areas have natural and/or cultural heritage resources that represent diversity and difference. Heritage tourism is viewed as having immense potential for stimulating development and bringing economic benefits. However, tourism can also bring negative impacts when it becomes imbalanced and the focus shifts from safeguarding heritage processes to the development of heritage products for consumption by tourists. These negative impacts become especially pronounced when short-term income generation supersedes longer-term validation and preservation of cultural traditions; when people from ethnic minorities become 'objectified' and there is a 'commodification' of their culture – whether or not there is an appropriation of culture by dominant stakeholders, or complicity within the ethnic minority communities. The notion of cultural 'authenticity' within heritage tourism is very complex. Who is in control of the processes of developing heritage tourism products and how these are 'negotiated'?
21.	It can <b>bring benefits to local communities</b> – for example: <b>affirmation of identities; a sense of pride; social renewal and regeneration; and/or, the exchange of economic, social, cultural and knowledge capital</b> . An ecomuseum that shows the characteristics in this list is more likely to bring these benefits to local communities in the longer-term, while at the same time encouraging the integrated safeguarding of natural and cultural heritage resources, and intangible and tangible cultural elements. An ecomuseum following these approaches should also facilitate a balance between the preservation and protection of heritage on the one hand, whilst stimulating and allowing cultural elements to be effectively used as a resource in the creative and cultural industries.

Although the above listed characteristics can represent the 'ecomuseum ideal', different ecomuseums might not display them all, prioritise them in the same way, or, have them in the same proportions. This goes back to the third 'pillar' of the ideal that suggests that each ecomuseum needs to be malleable' and responsive to particular local contexts and conditions. Therefore no two ecomuseums will ever follow the exact same approaches, or set of activities. No two ecomuseums will be the same. Each will be distinct and unique. An ecomuseum is not

a fixed model, structure, or approach that can be adopted outright or imposed. Instead, an ecomuseum should be a living and changing organism that right from its formation should be continually evolving to meet specific localised environmental, economic, social, cultural and political needs and imperatives.

This being said, can the set of characteristics be seen as being a prospective suite of complimentary guidelines for consideration in integrated heritage management for sustainable development and responsible tourism? If they can be considered as guidelines, do they have potential for application in China? Or will Chinese ecomuseums, due to a different set of environments, show different characteristics?

Many of the twenty-one characteristics outlined in Table 4 have very close synergies with the tenets supported by the various UNESCO instruments, frameworks and tools outlined earlier. As such, the 'ecomuseum ideal' should find a fairly comfortable match with the types of heritage and cultural projects encouraged by UNESCO, as many of the goals will be similar and the practical approaches shared. The pillars and characteristics of the 'ecomuseum ideal' provide an intellectual framework of guidelines. It may now be useful to introduce a proposed 'overall heritage management process model' that can help with practical application.



Photograph: International 'en-compass' scoping team in Hainan Province, China



Photograph: Guyanese member of the international 'en-compass' scoping team observing *Li* traditional foot-loom weaving in Hainan Province, China

## 5. An 'Overall Heritage Management Process Model' that supports 'ecomuseology' and the documentation and safeguarding of arts, culture and heritage resources

Before introducing the proposed 'overall heritage management process model' it is worth returning to consider how UNESCO defines 'safeguarding'. Among the definitions presented in the 2003 Convention it is stated that:

"Safeguarding" means measures aimed at ensuring the viability of the intangible cultural heritage, including the **identification, documentation, research, preservation, protection, promotion, enhancement, transmission**, particularly through formal and non-formal education, as well as the revitalisation of the various aspects of such heritage" (UNESCO 2003).

The proposed model (Fig 3 over page) has been developed (Corsane 1996: 53-54; Corsane 2005: 2-5; Corsane 2006b: 165-167; Corsane 2006c: 117-120; and, Corsane 2012) around a similar set of measures and activities as those listed in the above definition of 'safeguarding'. In its design it has been informed by several characteristics of the 'ecomuseum ideal'. Those central to the research and documentation activities of the model are numbers 11,12,15,16 and 17. In sequence, these suggest that the 'ecomuseum ideal' promotes the identifying, recording, documenting, researching, preserving, conserving and safeguarding of intangible and tangible heritage elements, practices, expressions resources, and products *in situ* in their original environments (11). In all of this, equal attention is given to tangible and intangible cultural heritage resources (12). At its very core, the 'ecomuseum ideal' encourages an **ongoing programme of documentation** of past and present life and people's interactions with all environmental factors (including physical, economic, social, cultural and political). With an ongoing research and documentation programme in place to safeguard heritage, change can be allowed as there will be no need to try to 'freeze' things in time out of fear that they will be lost forever (15). The central research and documentation programme should promote research that takes account of input from local experts (16) and uses multi-disciplinary and inter-disciplinary approaches (17).



Photograph: Guyanese 'en-compass' scoping team working in Guyana

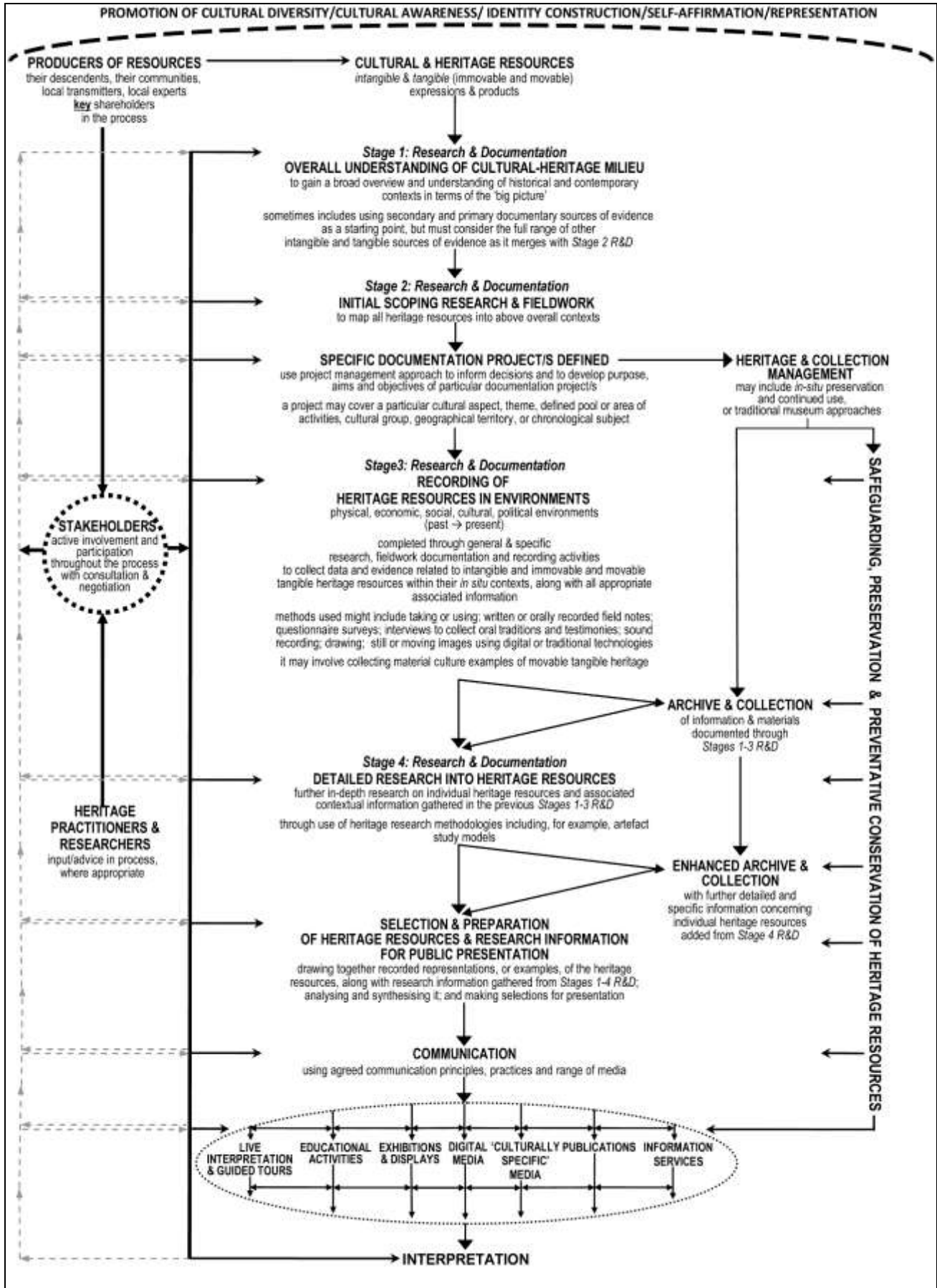


Figure 3: The 'overall heritage management process model', with feedback loops running up the left had side



In its very basic form, the process model begins with the actual cultural and heritage resources themselves. It then works through a number of core stages of research and documentation denoted down the centre of the diagram. These lead to the selection of material and associated information by the appropriate stakeholders, which is then communicated through a range of different media and then finally interpreted by a range of people, including students, visitors and tourists. After Stage 2 of the research and documentation, decisions are made about what cultural and heritage resources need to be safeguarded and collected and aspects of this heritage and collection management 'branch line' of outcomes are depicted down the right hand side of the diagram.

In more detail, the model takes as its starting point the notion that ecomuseum and safeguarding heritage work is performed to provide vehicles for the: promotion of cultural diversity; raising of cultural awareness; construction of identities; strengthening of self-affirmation; and encouragement of self-representation. Taking note that there would have been processes behind the original formation of cultural practices, material and expressions, the overall process in the model originates with the actual cultural and heritage resources present in the particular setting being considered and researched. There would have been human producers of these resources and their descendants, communities and any living transmitters and local 'experts' should be viewed as **key** stakeholder and shareholder groups in the overall processes of heritage management and safeguarding. This key group – along with representatives from the heritage practitioners and researchers, government, business and academic stakeholder groups – should be involved in all decision-making and implementation activities throughout the process. The proposed model emphasises the importance of public participation and stakeholder input in all stages and activities of a holistic 'overall heritage management process model', from involvement in the activities themselves to the decision-making processes that both lie behind these activities and connect them. This is denoted by the set of arrows down the left hand side of the diagram. In addition, the process model should not be viewed as being linear. Rather, it is cyclical and the dashed arrows up the left hand side show a feedback loop for every step of the process, which can inform any earlier part of the process. Again all stakeholder groups should be encouraged to provide feedback.

The central column through the process model has a strong focus that relates to an ongoing programme of research and documentation, which is in line with Characteristic 15 – and lies at the very heart – of the 'ecomuseum ideal'. This programme of research and documentation has four interconnected stages. Stage 1 involves the research and documentation essential to gain an overall understanding of the cultural-heritage *milieu* of the human setting being studied. This might require obtaining a broad overview and understanding of the historical and contemporary contexts through a range of primary and secondary sources of evidence. In Stage 2 of the research and documentation programme, scoping and fieldwork projects will be undertaken to identify the full range of valuable cultural and heritage resources available and to see how they relate to each other within the overall *milieu*. Valuable cultural and heritage resources include the immovable and moveable tangible resources, as well as the intangible cultural heritage resources connected to them. Consequently, these scoping activities may involve studying and documenting anything from natural habitats, the flora and fauna, ecosystems, urban and rural landscapes, archaeological and heritage sites, the built environment, suites of material objects, archival material, and artistic forms of expression. In addition, they will need to take account of the intangible resources, such as different

knowledge systems, belief patterns, oral traditions, oral testimonies, songs, dance, ritual, craft skills and everyday ways of doing things.

With information obtained from Stages 1 and 2, the stakeholders can make decisions about developing more specific heritage safeguarding projects. Here a project management approach and system can be established, with the setting of project aims and objectives. In addition, sets of responsibilities and tasks can be identified and, through processes of negotiation, delegated to the different stakeholder groups.

With the design of specific research and documentation projects, the process will move to Stage 3 of the research and documentation programme, which will primarily revolve around undertaking fieldwork. In this stage, work will be started to record the cultural and heritage resources *in situ* and within their past and present overlaid physical, economic, social, cultural and political environments. Here close attention will be given to recording the relationships between the different cultural and heritage resources. It is in this stage that the most extensive amount of data and information collection will be done. It is also here that local community specialists, tradition bearers and transmitters can really make valuable contributions. This data and information collection may require taking written and orally recorded notes, completing survey questionnaires, conducting interviews, videoing and photographing, amongst other data collection methods. It may also necessitate collecting some examples of movable material objects. Wherever this takes place, the documentation activities are of even more importance, as associated contextual information is especially important for material that is moved from its original location. With all of the information collected in Stage 3, the research and documentation programme can move into Stage 4. In this stage, each of the specific cultural and heritage resources will be researched and further documented in comprehensive detail. This research will become tightly focused on the individual aspects and sources of evidence. For example, in ecomuseum research, material culture and artefact study model approaches are employed to read meanings out of (and into) the material.

Through Stage 2, 3 and 4 of the research and documentation programme, decisions can be made about what intangible and tangible heritage resources need to be safeguarded, preserved and conserved through either of the more traditional, or the ecomuseum-like community-based, heritage and collection management activities. Wherever possible, these heritage resources should be preserved and conserved *in situ*. These activities run parallel to the stages of research and documentation and are depicted down the right hand side of the diagram. Again, any decisions related to these activities should be negotiated with stakeholder groups. In particular, community representatives should be involved in the work wherever possible, as they are likely to be the best stewards of their own culture. Through Stages 2, 3 and 4 a large amount of information and data will be produced and all of this can be fed into more traditional archive-like collections, or community-based memory archives. These archival collections will bridge, and are important for, both the communication and the heritage and collection management lines of the overall process.

The cultural and heritage resources themselves, along with all the associated data and information obtained through the different stages of research and documentation can then be processed and prepared for sharing and communicating with different audiences and users. This processing will involve the selection of material and information, the construction of messages to be communicated, and the choice of the communication channels and

methods to be used. The results of this will be a range of communication outputs that will be made accessible to the different end-users through a range of different media. These media might include: live interpretation through demonstrations and performances; guided tours; exhibitions and displays; academic and popular publications; television and radio programmes; and, communication through digital and computer platforms. These are all useful media for the transmission of information about cultural and heritage resources and elements. However, in safeguarding projects, it is also vital that there are opportunities for knowledge and skills relating to cultural heritage traditions and practices to be passed on from generation to generation by the older tradition-bearers, or cultural transmitters. Here workshops and 'master classes' led by transmitters are important, and the stakeholder groups can do much to arrange, support and run such activities to aid in the transmission of traditional cultural heritage practices and expressions. The use of competitions to motivate young people to learn the knowledge and skills can also be used effectively to pass on craft skills and cultural expressions.

Two final points need to be made in relation to the 'overall heritage management process model' more generally. The first is that any heritage management project involves actions of 'meaning-making' by everyone involved at any point in the process – from the initial research through to what is communicated in the final products and outcomes. Each person involved in the process in any way will come with different sets of background knowledge, experiences and views. This can have impacts throughout and means that nothing can really be totally objective. In relation to this, it is useful to consider the notion of 'interpretation'. Traditionally, museums and heritage professionals have spoken about how they provide interpretations for their various audiences through the different media. However, the end-users of whatever is communicated through the different media are not passive recipients. Rather they are active participants in meaning-making and will be involved in interpreting what is presented to them. In addition, they will often come as part of a group of tourists, family of friends and they will discuss what they are coming into contact with, in terms of the heritage resources and associated information provided. Therefore, the involvement of the users in interpreting for themselves what is presented and communicated to them is frequently a social activity of meaning-making. People may be seen as belonging to interpretative communities. Secondly, it needs to be understood that there are a range of external factors that will influence the process. These factors could be set by political, economic, social and cultural conditions and agendas.

Although this process model may still seem idealistic in theory, it is believed that it can help to liberate museum action and heritage management in practice. Along with the philosophy of the ecomuseum ideal, the ideas and methods behind the 'overall heritage management model' became the basis for the 'en-compas' project that will be introduced in the next part of the training manual.



## 6. Stages of Research & Documentation in the 'Overall Heritage Management process Model'

In the 'Overall Heritage Management Process Model' introduced in Section 5 above, four key stages of 'Research & Documentation' have been identified as being of significance. These are:

**Stage 1: Research & Documentation** is needed in order to gain an overall understanding of the cultural-heritage milieu of the people involved in researching and documenting their culture and heritage. Here, there is a need to acquire a broad overview of the context/s in which the people who have been involved in creating the cultural expressions and products have lived both in historical and contemporary perspectives and situations over time. This research may include studying primary and secondary sources of evidence created from various disciplines and fields of study. However, this research into the 'bigger picture' will also require those involved to be aware of the full range of natural, and intangible and tangible cultural heritage resources.

**Stage 2: Research & Documentation** will involve initial scoping research and fieldwork to identify the resources and the relationships between them, which should be considered in terms of mapping them into their overall context. After this, individual heritage documentation, safeguarding and conservation projects can be formulated to care for heritage expressions and products under threat. For example, a specific project may cover a particular cultural aspect, theme, defined pool or area of activities, cultural group, geographical territory, or chronological subject.

**Stage 3: Research & Documentation** can then focus on researching, documenting and recording how people have lived, or currently live, in their over-layered physical, biological, economic, social, cultural and political environments (Figure 4).

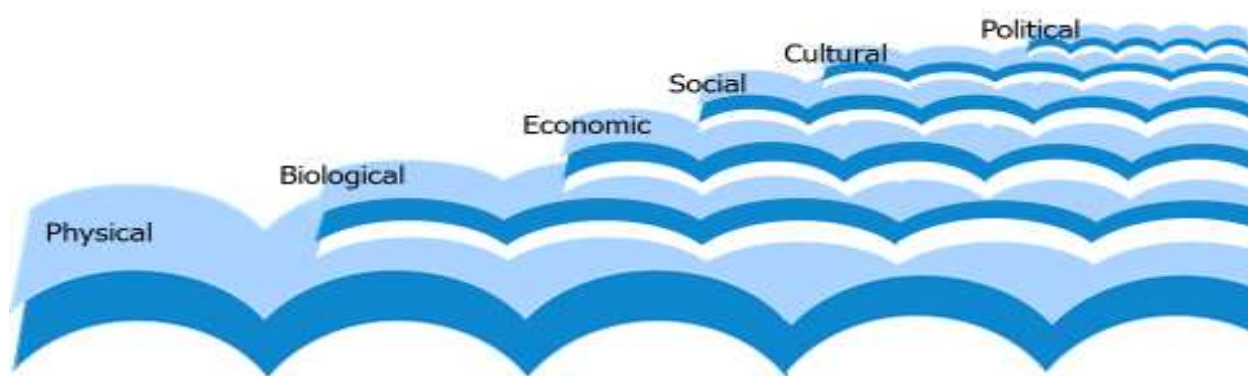


Figure 4: Over-layered Physical, Biological, Economic, Social, Cultural & Political Environments

In these over-layered environments what takes place in each is often deeply rooted in the underlying environment/s below it. Atmosphere, climate, geology, soil and water systems in the physical environment influence flora and fauna in the biological environment. The physical and biological environments can help to stimulate certain economic environments. These first

three can impact on the developments of certain social environments, which in turn can stimulate certain cultural elements. All of these can lead to the creation of political systems.

This stage is often completed through more specific research, fieldwork, documentation and recording activities to collect data and evidence related to intangible and immovable and movable tangible heritage resources within their *in situ* contexts, along with all appropriate associated information. Methods methodologies and methods may be drawn from the earth sciences; life sciences, social sciences, humanities and arts. When dealing with heritage and cultural resources, use may be made of: written or orally recorded field notes; questionnaire surveys; interviews to collect oral traditions and testimonies; sound recording; drawing; still or moving images using digital or traditional technologies.

**Stage 4: Research & Documentation** will then focus more directly on studying in more detail specific heritage resources, both intangible and tangible within the framework of their sets and close linkages.

For example, in Hainan Province in the Peoples' Republic of China, the traditional cultural techniques of textile production of Li brocade was considered within the processes of: collection of the cotton; removing the seeds, spinning, dyeing, weaving and embroidery of the textiles. In the full processes, attention was given to both the intangible skills and all the tangible objects associated with the each stage from the collection of raw materials to the finished products.

In this process of documentation and research, methods were developed for studying both intangible and material culture studies. These will be dealt with in Section 7 of this manual. However, before that is done, it is important to note that it was important to consider the different stakeholder groups that needed to be included in the research, documentation and recording activities. This is done in the next sub-section which relates to the above model with its 4 stages of research and documentation.



Photograph: Guyanese 'en-compass' in-country training workshop participants

## 6.1 Stakeholder fieldwork strategies for scoping and identifying arts, culture and heritage resources under threat

The illustration of the 'four-legged stool' (Figure 5) is an image, which can be used to help explain the concept of input and support from the main 'stakeholder' groups in the overall processes of documenting, researching, communicating and safeguarding heritage resources.

# Ecomuseum

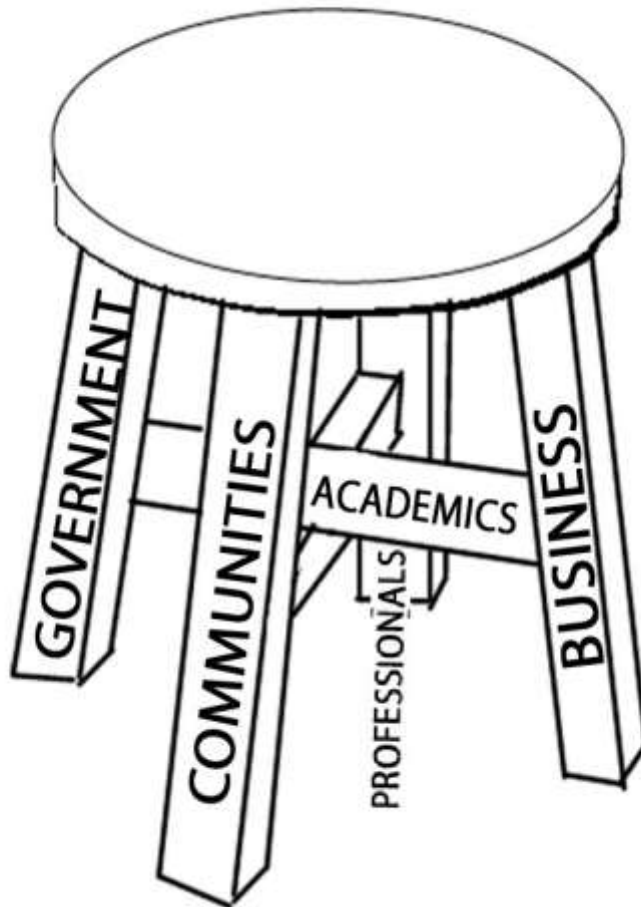


Figure 5: The 'four-legged stool' as an illustration for how stakeholder groups can support the ecomuseum

In the 'four-legged stool' illustration, each of the legs can be viewed as being one of the main stakeholder groups that should be involved in developing and establishing ecomuseums. The indispensable leg can be seen as the communities themselves, including the elders, tradition-bearers and cultural transmitters. In the illustration this leg has been placed in the foreground to symbolise that it is the communities that need to be at the forefront of any safeguarding programme. Without the communities, there would be no heritage or culture to safeguard in the first place. In many ways, as stated in the UNESCO instruments and frameworks, communities need to take the lead and be encouraged and empowered to do so. This is why community participation is so pronounced in the 'ecomuseum ideal'.

Two other critical legs of the stool represent the government and business stakeholder groups. Government needs to provide the appropriate legislation, policies and administrative guidance. Business stakeholders (and maybe it is better to call this the group of shareholders), including tour and visitor attraction companies, need to share their entrepreneurial and marketing spirit and skills. They may even possibly consider the investment of capital to ensure the safeguarding of the heritage, which will ensure long-term benefits for all concerned. Without some support and resources from government and business it would be difficult to take things forward at all. The final main leg of the ecomuseum stool would be the stakeholder group of professional heritage practitioners and museologists. In the illustration, this group has been placed as the leg at the back of the image. This does not mean that they are the least important; rather it shows that they need to be fully behind any safeguarding project and constantly working 'behind the scenes' and encouraging and motivating all the other stakeholder groups. All four of these stakeholder groups should work together as equal partners in the decision-making processes and activities of the ecomuseum. The fifth key stakeholder group might be the academics – represented by the cross-struts in the illustration. This group can assist in strengthening the support-base provided by the four legs. Academics can help to facilitate safeguarding projects by providing links through research ideas and methods. The illustration of the 'four-legged stool' can be symbolic of the establishment of a strong solid support base that should help to build long-term sustainability. If the legs are not of equal size, or one is not there, the stool will become unstable.

As the project developed the in-country partners, who lead working with the different stakeholder groups, developed a system for undertaking Stages 1-3 of the research and documentation processes outlined above. Through consultation and negotiation amongst the core team members, five themes were selected of cultural products and expressions under threat that the project would initially focus on.

## 6.2 Data-collection themes & templates developed in the 'en-compass' project

The initial international 'en-compass' scoping team of fourteen identified five main areas and themes to focus on (provided in 2011 'en-compass' project Scoping Report). These were: language/dialect; art, craft & traditional skills; poems or stories; music or songs; and, dance. Once these decided upon, the team began drafting the data collection templates shown on pages 30-41.

This provided for the collection of information, evidence and data that could help to determine the meaning and significance behind the cultural and heritage expressions and products. These templates were then tested in the in-country scoping workshops in the first year of the project. During these scoping workshops the templates were refined and then used to collect information for the database. The templates consist of a number of data fields, with accompanying notes of what can do into each data field. These template data collection forms provided the basis for Stages 2 & 3 of the Research and Documentation.

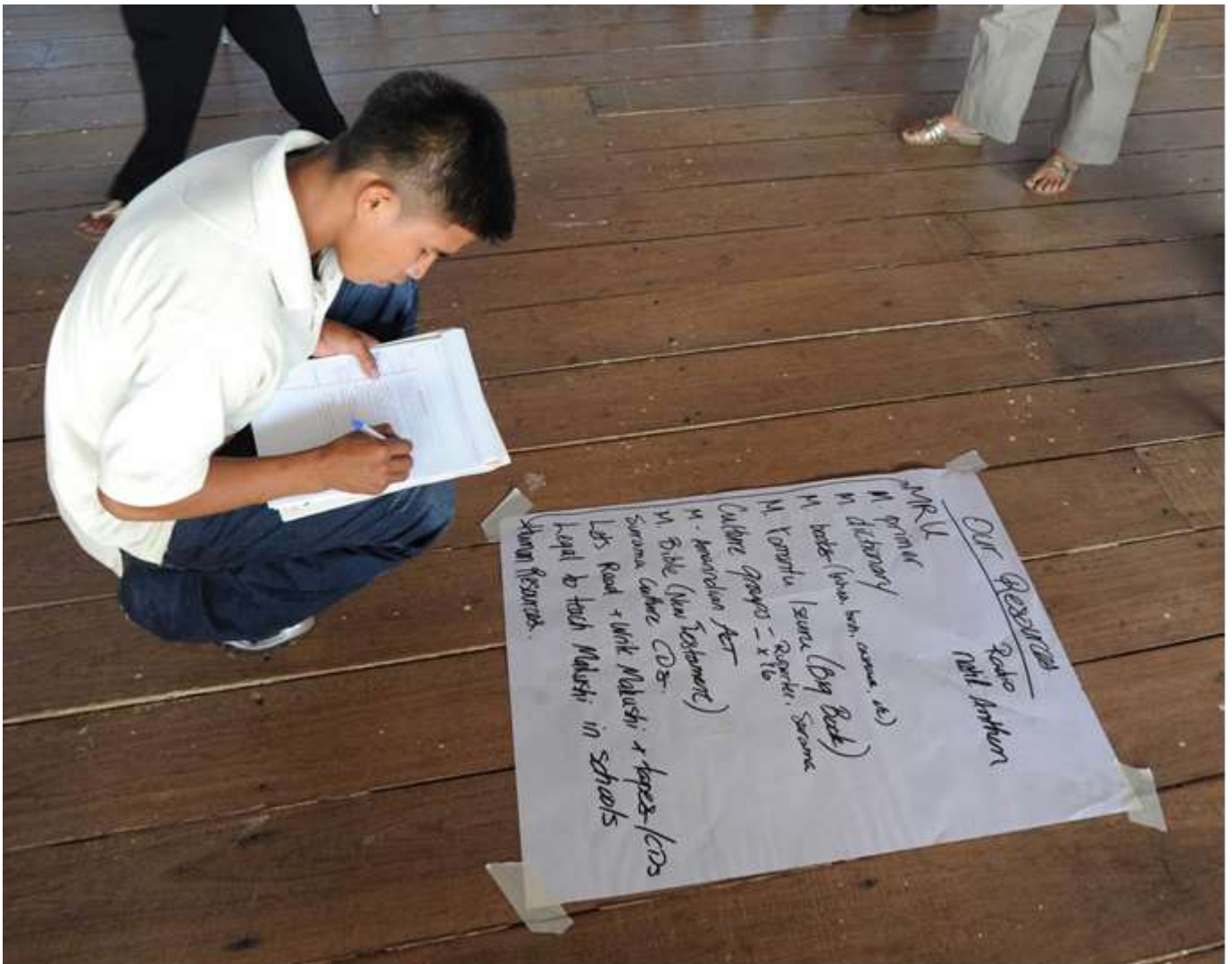
The templated provide ideas on what type of information can be collected in a project of this nature and can be adapted for any area or theme being considered by a local community and its supporters from the different stakeholder groups.

The completed 'data collection template forms' were used to collect data and associated information in Stages 2 & 3 of the research and documentation processes. This information could then be developed with further research which is considered in the Section 7.

LANGUAGE/DIALECT	
Data Field	Notes on what needs to be recorded in each data field
1. Name of language	<i>What is the name of the language? Does the name appear in other languages? List the names and variations in names used.</i>
2. Country	<i>Name the country in which the language/words are being recorded. If the language is found in several countries, list these.</i>
3. Area (within the country)	<i>Name the local area in which the language/words are being recorded. If the language is found in several areas, provinces, regions across the country, list these.</i>
4. Ethnic group/tribe/clan	<i>Name the ethnic group and/or language/dialect group from which the person manufacturing the product and using the skill/s being recorded comes from.</i>
5. General origin and history of the language	<i>Provide a short general history of the language/dialect or words being recording. Where, when, why and how did the product start to be manufactured and the skill/s developed and used? What changes haven place over time?</i>
6. Specific historical and contextual information associated with the particular example of language being recorded	<i>Provide a short entry of Specific historical information linked to the particular language/dialect or words being recorded. Who is/are the specific people using this language/dialect or words? Where, when, why and how has the recorded language/dialect or words been used? Is there any historical or associated information that distinguishes this particular language/dialect or words and the person/people who use them?</i>
7. Gender (if relevant)	<i>What gender are people who use the language/dialect or particular words. Is it normally male or female or both that use the same vocabulary?</i>
8. Age range (if relevant)	<i>What age group/s do people who use the specific vocabulary and words?</i>
9. Transmitters (if appropriate and known)	<i>Provide full names of local experts and transmitters who still use the particular language/dialect or words.</i>
10. Description: alphabet/characters	<i>What written, character or pictorial form does the language take?</i>
11. Numbers (up to ten and main multiples after that) and colours (most common)	<i>Provide written forms of the numbers zero to ten and the colours of the rainbow.</i>
12. Pronouncement and sounds of key words?	
13. Record/document some of the ways the language is used	<i>Are the language or words used in particular places (e.g. home, work) and in particular situations (formal meetings, education, political events, women's gatherings, men's gathering's, etc?)</i>
14. Significance of the language (if any)	<i>What significance and values do the language and words have politically culturally, socially?</i>
15. Any relevant associated information	<i>List any other intangible or tangible heritage resources or items that can be associated with the language/dialect or words. This helps to provide connections within the wider cultural and historical contexts. What natural resources, landscapes, structures, buildings, constructions, objects, events, activities, oral traditions, oral testimonies, music, songs, dances, rituals, festivals, ceremonies, etc. have cultural connections with the language, dialect or group of words?</i>
16. Previous research	<i>Has any previous research been done on this language/dialect or words? If yes, which organisation or individual undertook the research?</i>
17. Listed/designated	<i>Has the language/dialect or words been recognised and registered internationally, nationally, provincially or locally in any list of designated heritage resources? If yes, what list/s.</i>
18. Threats or risks	<i>What threats are there to the survival of the language/dialect or words? For example, there are a number of keywords that can be considered: globalisation; urbanisation; modernisation; loss of values and recognition traditionally invested in the language, or dialect; desire to learn and use another language for personal advancement in politics, business or education; dominance of another language.</i>



Documentation record and techniques	
• Recorder	Provide full name of the person who has collected the information for each data field and completed the form
• Date and time of recording	Provide the day/month/year of when the recording and data collection was done and the time of completing the form, using the 2400 clock.
• Location of recording	Provide details of the place where the data collection was undertaken in the field. Use place names and GPS coordinates where possible.
• Written commentary	Are there any other records or references in academic or popular literature about the language/dialect or words being recorded? Include a reference list, if yes.
• Audio	Are there any recorded oral traditions, oral testimonies or sounds associated with the language/dialect or words being recorded? If yes, make a list of them and where they are located.
• Video	Are there any video clips associated with the language/dialect or words being recorded? If yes, make a list of them and where they are located.



Photograph: Guyanese 'en-compass' in-country training workshop listing resources on language

<b>ART , CRAFT OR TRADITIONAL SKILLS</b>	
<b>Data Field</b>	<b>Notes on what needs to be recorded in each data field</b>
1. Name of product and/or practice	<i>What is the name of the object or skill practiced in the originating language? Does the name appear in other languages? List the names and variations in names used.</i>
2. Country	<i>Name the country in which the product or skill practiced is being recorded. If the product or skill is found in several countries, list these.</i>
3. Area (within the country)	<i>Name the local area in which the product or skill practiced is being recorded. If the product or skill is found in several areas, provinces, regions across the country, list these.</i>
4. Ethnic group/tribe/clan	<i>Name the ethnic group and/or language dialect group from which the person manufacturing the product and using the skill/s being recorded comes from.</i>
5. General origin and history of the skill/s	<i>Provide a short general history of the product or skill/s being recording. Where, when, why and how did the product start to be manufactured and the skill/s developed and used? What changes haven place over time?</i>
6. Specific historical information linked to a particular item/product/artifact associated with the artistic craft or traditional skill being recorded	<i>Provide a short entry of Specific historical information linked to a particular item/product/artifact associated with the artistic craft or traditional skill being recorded. Who is the artist, craftsman or person using the traditional skills? Where, when, why and how has the recorded item been made? Is there any historical or associated information that distinguishes this particular person, product or use of skill/s?</i>
7. Gender of practitioners	<i>What gender are people who use the artistic, craft or traditional skills. Is it normally male or female or both that use the skill?</i>
8. Age range of practitioners (if appropriate)	<i>What age group/s do people who use the artistic, craft or traditional skills represent?</i>
9. Transmitters (if appropriate and known)	<i>Provide full names of local experts and transmitters who still practice and teach the particular artistic, craft or traditional skill.</i>
10. Description: raw material(s)	<i>List what raw materials are used to produce the product. Include both common names and scientific names where possible and appropriate.</i>
11. Description: Manufacturing techniques	<i>Provide details of different techniques and processes that are associated with manufacturing the product and which may help to explain the skills in use.</i>
12. Description: tools used	<i>What tools are used when the particular artistic, craft or traditional skill being used to produce the product? List these.</i>
13. Description: design and patterns (if present)	<i>List what designs and patterns are used in producing the product.</i>
14. Meaning of the art, craft or skill	<i>What does the product mean for the maker, owner, user, and observer? Is the product, and its manufacture, design and decoration functional, artistic, symbolic, representative, ceremonial, etc.</i>
15. Significance of the art, craft or traditional skill	<i>What significance and values does the product or skill/s have politically, culturally, socially, economically?</i>
16. Any relevant associated information, including associated intangibles and tangibles	<i>List any other intangible or tangible heritage resources or items that can be associated with the product being recorded and the artistic, craft or traditional skill used in its manufacture. This helps to provide connections within the wider cultural and historical contexts. What natural resources, landscapes, structures, buildings, constructions, objects, archival materials, documents, old photographs, oral traditions, oral testimonies, music, songs, dances, rituals, festivals, ceremonies, etc. have cultural connections with the product or skill/s?</i>
17. Previous research	<i>Has any previous research been done on this artistic, craft, traditional skill/s? If yes, which organisation or individual undertook the research?</i>
18. Listed/designated	<i>Has the artistic, craft, traditional skill been recognised and registered internationally, nationally, provincially or locally in any list of designated heritage resources? If yes, what list/s.</i>
19. Threats or risks	<i>What threats are there to the survival of the product and/or skill? For example, there are a number of keywords that can be considered: globalisation; urbanisation; modernisation; loss of values and recognition traditionally invested in the product or skill/s; 'progress' and new production techniques; mass production.</i>

<b>Documentation record and techniques</b>	
• Recorder	<i>Provide full name of the person who has collected the information for each data field and completed the form</i>
• Date and time of recording	<i>Provide the day/month/year of when the recording and data collection was done and the time of completing the form, using the 24h00 clock.</i>
• Location of recording	<i>Provide details of the place where the data collection was undertaken in the field. Use place names and GPS coordinates where possible.</i>
• Written commentary	<i>Are there any other records or references in academic or popular literature about the art, craft or traditional skill being recorded? Include a reference list, if yes.</i>
• Audio	<i>Are there any recorded oral traditions, oral testimonies or sounds associated with the art, craft or traditional skill being recorded? If yes, make a list of them and where they are located.</i>
• Photograph	<i>Are there any photographs of the art, craft or traditional skill being recorded? If yes, make a list of them and where they are located.</i>
• Video	<i>Are there any video clips associated with the art, craft or traditional skill being recorded? If yes, make a list of them and where they are located.</i>



Photograph: International 'en-compass, scoping team members from China, Kenya and Guyana observing traditional craft skills

## POEM or STORY

Data Field	Notes on what needs to be recorded in each data field
1. Name of poem or story	<i>What is the name of the poem or story in the originating language? Does the name appear in other languages? List the names and variations in names used.</i>
2. Country	<i>Name the country in which the poem or story is being recorded. If the poem or story is found in several countries, list these.</i>
3. Area (within the country)	<i>Name the local area in which the poem or story is being recorded. If the poem or story is found in several areas, provinces, regions across the country, list these.</i>
4. Ethnic group/tribe/clan	<i>Name the ethnic group and/or language dialect group from which the poem or story being recorded comes from.</i>
5. General origin and history of the poem or stories	<i>Provide a short general history of the poem or story being recording. Where, when, why and how did the poem or story start? What changes to the poem or story have taken place over time?</i>
6. Specific historical and contextual information associated with the particular example of poem/story being recorded	<i>Provide a short entry of specific historical information linked to the particular place where the poem or story being recorded is told, along with information about the teller and where, when, how they learnt the poem or story and who from. Is there any historical or associated information that distinguishes this particular person and their version of the poem or story?</i>
7. Gender (if appropriate)	<i>What gender are people who normally communicate the poem or story? What gender is the audience of recipient of the poem or story?</i>
8. Age range (if appropriate)	<i>What age group/s are the people who communicate the poem or story? What age group/s are the audience or recipients?</i>
9. Transmitters (if appropriate and known)	<i>Provide full names of local experts and transmitters who communicate and pass on the poem or story</i>
10. Description: type/form of poem and story	<i>What type or form does the poem or story take? What is the central theme? Is it normally communicated orally or in writing? In what genre is the poem or story?</i>
11. Purpose of poem or story	<i>What is the aim of communicating the poem or story? Is it to pass on historical information? Is it to teach/instruct? Is it to communicate values? Is it to stimulate feelings? Is it to encourage? Is it to make people laugh?</i>
12. When it is performed/communicated e.g. night, daytime, season, wedding	<i>Is the poem or story only communicated in relation to particular dates, times of day, seasons, activities, ceremonies and/or rituals</i>
13. Associated costume and material props (and colour if significant)	<i>Are there any costumes or props associated with the communicating of the poem or the telling of the story?</i>
14. Audience for the poem or story is performed for	<i>Is the poem or story communicated to individuals, groups? Is it only communicated between men or women or both?</i>
15. Meaning of the poem or story	<i>What does the poem or story mean to the community, family, individual, teller/communicator and the receiver/reader/listener? Is the poem or story functional, artistic, symbolic, representative, ceremonial, etc.</i>
16. Significance of the poem or story	<i>What significance and values does the poem or story have politically, culturally or socially?</i>
17. Any relevant associated information, including associated intangibles and tangibles	<i>List any other intangible or tangible heritage resources or items associated with the poem or story, which is being recorded. This helps to provide connections within the wider cultural and historical contexts. What natural resources, landscapes, structures, buildings, constructions, objects, events, activities, oral traditions, music, songs, dances, rituals, festivals, ceremonies, etc. have cultural connections with the poem or story?</i>
18. Previous research	<i>Has any previous research been done on this poem or story? If yes, which organisation or individual undertook the research?</i>
19. Listed/designated	<i>Has the poem or story been recognised and registered internationally, nationally, provincially or locally in any list of designated heritage resources? If yes, what list/s.</i>
20. Threats or risks	<i>What threats are there to the survival of the poem or story? For example, there are a number of keywords that can be considered: globalisation; urbanisation; modernisation; loss of values and recognition traditionally linked to the poem or story; 'the meaning of the poem or story is becoming lost.</i>

### Documentation record and techniques

• Recorder	<i>Provide full name of the person who has collected the information for each data field and completed the form</i>
• Date and time of recording	<i>Provide the day/month/year of when the recording and data collection was done and the time of completing the form, using the 24h00 clock.</i>
• Location of recording	<i>Provide details of the place where the data collection was undertaken in the field. Use place names and GPS coordinates where possible.</i>
• Written commentary	<i>Are there any other records or references in academic or popular literature about the poem or story, which is being recorded? Include a reference list, if yes.</i>
• Audio	<i>Are there any audio recordings of the poem or story being communicated? If yes, make a list of them and where they are located.</i>
• Photograph	<i>Are there any photographs of the poem or story being communicated? If yes, make a list of them and where they are located.</i>
• Video	<i>Are there any video clips associated with the poem or story, which is being recorded? If yes, make a list of them and where they are located.</i>



Photograph: Story telling in North East England

<b>TRADITION, CEREMONY or RITUAL</b>	
<b>Data Field</b>	<b>Notes on what needs to be recorded in each data field</b>
1. Name of tradition, ceremony or ritual [Maximum 150 characters]	<i>What is the name of the tradition, ceremony or ritual in the originating language? Does the name appear in other languages? List the names and variations in names used.</i>
2. Country [Maximum 30 characters]	<i>Name the country in which the tradition, ceremony or ritual is being recorded. If the tradition, ceremony or ritual is found in several countries, list these.</i>
3. Area (within the country) [Maximum 100 characters]	<i>Name the local area in which the tradition, ceremony or ritual is being recorded. If the tradition, ceremony or ritual is found in several areas, provinces, regions across the country, list these.</i>
4. Ethnic group/tribe/clan [Maximum 100 characters]	<i>Name the ethnic group and/or language dialect group from which the tradition, ceremony or ritual being recorded comes from.</i>
5. General origin and history of the tradition, ceremony or ritual [Maximum 2000 characters]	<i>Provide a short general history of the tradition, ceremony or ritual being recording. Where, when, why and how did the tradition, ceremony or ritual start? What changes to the tradition, ceremony or ritual have taken place over time?</i>
6. Specific historical and contextual information associated with the particular example of the tradition/ ceremony/ritual being recoded	<i>Provide a short entry of specific historical information linked to the particular place where the tradition, ceremony or ritual being recorded is taking place, along with information about those involved, or officiating, and where, when, how they learnt the tradition, ceremony or ritual and who from. Is there any historical or associated information that distinguishes this particular version of the tradition, ceremony or ritual?</i>
7. Gender (if appropriate)	<i>What gender are people who normally participate in, or officiate at, the tradition, ceremony or ritual?</i>
8. Age range (if appropriate)	<i>What age group/s are the people who participate in, or officiate at, the tradition, ceremony or ritual?</i>
9. Transmitters (if appropriate and known)	<i>Provide full names of local experts and transmitters who participate in, or officiate at, the tradition, ceremony or ritual</i>
10. Description: type/form of tradition, ceremony or ritual	<i>What type or form does the tradition, ceremony or ritual take? What is the central theme? Is it political, cultural, social, religious?</i>
11. Purpose of tradition, ceremony or ritual	<i>What is the purpose of the tradition, ceremony or ritual? Is it religious? Is it a rite of passage? Is it to commemorate an event? Is it related to a season?</i>
12. When it is performed e.g. night, daytime, season, wedding	<i>Is the tradition, ceremony or ritual only communicated in relation to particular dates, times of day, seasons, activities, ceremonies and/or rituals</i>
13. Associated costume and material (and colour if significant)	<i>Are there and costumes or props associated with the practice of tradition, ceremony or ritual?</i>
14. Audience for the tradition, ceremony or ritual is performed for	<i>Does the tradition, ceremony or ritual involve individuals, groups? Does it only involve men or women or both?</i>
15. Meaning of the tradition, ceremony or ritual	<i>What does the tradition, ceremony or ritual mean to the community, family, individual, official, leader, participant?</i>
16. Significance of the tradition, ceremony or ritual	<i>What significance and values does the tradition, ceremony or ritual have politically, religiously, culturally or socially?</i>
17. Any relevant associated information, including associated intangibles and tangibles [Maximum 2000 characters]	<i>List any other intangible or tangible heritage resources or items associated with the tradition, ceremony or ritual, which is being recorded. This helps to provide connections within the wider cultural and historical contexts. What natural resources, landscapes, structures, buildings, constructions, objects, events, activities, oral traditions, music, songs, dances, festivals, etc. have cultural connections with the tradition, ceremony or ritual?</i>
18. Previous research [Maximum 2000 characters]	<i>Has any previous research been done on this tradition, ceremony or ritual? If yes, which organisation or individual undertook the research?</i>
19. Listed/designated [Maximum 250 characters]	<i>Has the tradition, ceremony or ritual been recognised and registered internationally, nationally, provincially or locally in any list of designated heritage resources? If yes, what list/s.</i>
20. Threats or risks [Maximum 2000 characters]	<i>What threats are there to the survival of the tradition, ceremony or ritual? For example, there are a number of keywords that can be considered: globalisation; urbanisation; modernisation; loss of values and recognition traditionally linked to the tradition, ceremony or ritual; 'the meaning of the tradition, ceremony or ritual is becoming lost.</i>

### Documentation record and techniques

• Recorder	<i>Provide full name of the person who has collected the information for each data field and completed the form</i>
• Date and time of recording	<i>Provide the day/month/year of when the recording and data collection was done and the time of completing the form, using the 24h00 clock.</i>
• Location of recording	<i>Provide details of the place where the data collection was undertaken in the field. Use place names and GPS coordinates where possible.</i>
• Written commentary	<i>Are there any other records or references in academic or popular literature about the tradition, ceremony or ritual, which is being recorded? Include a reference list, if yes.</i>
• Audio	<i>Are there any audio recordings of the tradition, ceremony or ritual being performed? If yes, make a list of them and where they are located.</i>
• Photograph	<i>Are there any photographs of the tradition, ceremony or ritual being performed? If yes, make a list of them and where they are located.</i>
• Video	<i>Are there any video clips associated with the tradition, ceremony or ritual, which is being recorded? If yes, make a list of them and where they are located.</i>



Photograph: Ceremonial dress of Makushi in Guyana

## MUSIC or SONG

Data Field	Notes on what needs to be recorded in each data field
1. Name of music or song	<i>What is the name of the music or song in the originating language? Does the name appear in other languages? List the names and variations in names used.</i>
2. Country	<i>Name the country in which the music or song is being recorded. If the music or song is found in several countries, list these.</i>
3. Area (within the country)	<i>Name the local area in which the music or song is being recorded. If the music or song is found in several areas, provinces, regions across the country, list these.</i>
4. Ethnic group/tribe/clan	<i>Name the ethnic group and/or language dialect group from which the music or song being recorded comes from.</i>
5. General origin and history of the music and song	<i>Provide a short general history of the music or song being recording. Where, when, why and how did the music or song start? What changes to the music or song have taken place over time?</i>
6. Specific historical and contextual information associated with the particular music/singing performance	<i>Provide a short entry of specific historical information linked to the particular place where the music or song being recorded is performed, along with information about the performer/s and where, when, how they learnt the music or song and who from. Is there any historical or associated information that distinguishes this music or song?</i>
7. Gender (if appropriate)	<i>What gender are people who normally perform the music or song? What gender is the audience of the music or song?</i>
8. Age range (if appropriate)	<i>What age group/s are the people who perform the music or song? What age group/s are the audience or recipients?</i>
9. Transmitters (if appropriate and known)	<i>Provide full names of local experts and transmitters who perform and pass on the music or song</i>
10. Description: type/form of music or song (e.g. vocal instrumental)	<i>What type or form does the music or song take? What is the central theme? In what genre is the music or song?</i>
11. Purpose of the music or song	<i>What is the purpose of the music or song? Is there an emotion or a story attached?</i>
12. When it is performed e.g. night, daytime, season, wedding	<i>Is the music or song only performed in relation to particular dates, times of day, seasons, activities, ceremonies and/or rituals</i>
13. Associated Instrument(s) used	<i>Are there and costumes or props associated with the performance of the music or singing of the song?</i>
14. Audience for the music or song	<i>Is the music or song performed to individuals, groups? Is it only communicated between men or women or both?</i>
15. Mode/scale/tonality	<i>Describe any key musical and/or vocal elements</i>
16. Range/number of performers	<i>How many people normally perform the piece of music or sing the song?</i>
17. Meaning of the music or song	<i>What does the music or song mean to the community, family, individual, performer, audience?</i>
18. Significance of the music or song	<i>What significance and values does the music or song have politically, culturally or socially?</i>
19. Composer (if there is a known originator) or oral transmitter	<i>Provide the full name of the original composer, if Known, or the names of any well-known performers.</i>
20. Any relevant associated information, including associated intangibles and tangibles	<i>List any other intangible or tangible heritage resources or items associated with the music or song, which is being recorded. This helps to provide connections within the wider cultural and historical contexts. What natural resources, landscapes, structures, buildings, constructions, objects, events, activities, oral traditions, dances, rituals, festivals, ceremonies, etc. have cultural connections with the music or song?</i>
21. Previous research	<i>Has any previous research been done on this music or song? If yes, which organisation or individual undertook the research?</i>
22. Listed/designated	<i>Has the music or song been recognised and registered internationally, nationally, provincially or locally in any list of designated heritage resources? If yes, what list/s.</i>
23. Threats or risks	<i>What threats are there to the survival of the music or song? For example, there are a number of keywords that can be considered: globalisation; urbanisation; modernisation; loss of values and recognition traditionally linked to the music or song; the meaning of the music or song is becoming lost.</i>



### Documentation record and techniques

• Recorder	<i>Provide full name of the person who has collected the information for each data field and completed the form</i>
• Date and time of recording	<i>Provide the day/month/year of when the recording and data collection was done and the time of completing the form, using the 24h00 clock.</i>
• Location of recording	<i>Provide details of the place where the data collection was undertaken in the field. Use place names and GPS coordinates where possible.</i>
• Written commentary	<i>Are there any other records or references in academic or popular literature about the music or song, which is being recorded? Include a reference list, if yes.</i>
• Audio	<i>Are there any audio recordings of the music or song being performed? If yes, make a list of them and where they are located.</i>
• Photograph	<i>Are there any photographs of the music or song being performed? If yes, make a list of them and where they are located.</i>
• Video	<i>Are there any video clips associated with the performance of music or song, which is being recorded? If yes, make a list of them and where they are located.</i>



Photograph: exchange of information about music traditions in Kenya and North East England



Photograph: Traditional singing in Hainan Province, China

<b>DANCE</b>	
<b>Data Field</b>	<b>Notes on what needs to be recorded in each data field</b>
1. Name of dance	<i>What is the name of the dance in the originating language? Does the name appear in other languages? List the names and variations in names used.</i>
2. Country	<i>Name the country in which the dance is being recorded. If the dance is found in several countries, list these.</i>
3. Area (within the country)	<i>Name the local area in which the dance is being recorded. If the dance is found in several areas, provinces, regions across the country, list these.</i>
4. Ethnic group/tribe/clan [Maximum 100 characters]	<i>Name the ethnic group and/or language dialect group from which the dance being recorded comes from.</i>
5. General origin and history of the dance	<i>Provide a short general history of the dance being recording. Where, when, why and how did the dance start? What changes to the dance have taken place over time?</i>
6. Specific historical and contextual information associated with the particular dance performance	<i>Provide a short entry of specific historical information linked to the particular place where the dance being recorded is performed, along with information about the performer/s and where, when, how they learnt the dance and who from. Is there any historical or associated information that distinguishes this particular dance?</i>
7. Gender (if appropriate)	<i>What gender are people who normally perform the dance? What gender is the audience of the dance?</i>
8. Age range (if appropriate)	<i>What age group/s are the people who perform the dance? What age group/s are the audience?</i>
9. Transmitters (if appropriate and known)	<i>Provide full names of local experts and transmitters who perform and pass on the dance.</i>
10. Description: type/form of dance	<i>What type or form does the dance take? What is the central theme? In what genre is the dance?</i>
11. Purpose of the dance (stand alone or part of a larger process)	<i>What is the purpose of the dance? Is there an emotion or a story attached?</i>
12. When it is performed e.g. night, daytime, season, wedding	<i>Is the dance only performed in relation to particular dates, times of day, seasons, activities, ceremonies and/or rituals</i>
13. Associated dance costumes and body decoration (if any); also, record the people who do this if different to the dancers themselves	<i>Are there and costumes or props associated with the dance?</i>
14. Audience for the dance	<i>Is the dance performed to individuals, groups? Is it only communicated between men or women or both?</i>
15. Instrument(s) used	<i>Describe any instruments played to accompany the dance.</i>
16. Range/number of performers	<i>How many people normally perform the dance?</i>
17. Meaning of the dance	<i>What does the dance mean to the community, family, individual, performer, audience?</i>
18. Significance of the dance	<i>What significance and values does the dance have politically, culturally or socially?</i>
19. Accompanying music (if any)	<i>Provide the full name of the original composer, if there is any accompanying music. What music or songs accompany the dance?</i>
20. Any relevant associated information. including associated intangibles and tangibles	<i>List any other intangible or tangible heritage resources or items associated with the dance, which is being recorded. This helps to provide connections within the wider cultural and historical contexts. What natural resources, landscapes, structures, buildings, constructions, objects, events, activities, oral traditions, rituals, festivals, ceremonies, etc. have cultural connections with the dance?</i>
21. Previous research	<i>Has any previous research been done on this dance? If yes, which organisation or individual undertook the research?</i>
22. Listed/designated	<i>Has the dance been recognised and registered internationally, nationally, provincially or locally in any list of designated heritage resources? If yes, what list/s.</i>
23. Threats or risks [Maximum 2000 characters]	<i>What threats are there to the survival of the dance? For example, there are a number of keywords that can be considered: globalisation; urbanisation; modernisation; loss of values and recognition traditionally linked to the dance; the meaning of the dance is becoming lost.</i>

## Documentation record and techniques

<b>• Recorder</b>	<i>Provide full name of the person who has collected the information for each data field and completed the form</i>
<b>• Date and time of recording</b>	<i>Provide the day/month/year of when the recording and data collection was done and the time of completing the form, using the 24h00 clock.</i>
<b>• Location of recording</b>	<i>Provide details of the place where the data collection was undertaken in the field. Use place names and GPS coordinates where possible.</i>
<b>• Written commentary</b>	<i>Are there any other records or references in academic or popular literature about the dance, which is being recorded? Include a reference list, if yes.</i>
<b>• Audio</b>	<i>Are there any audio recordings music or song that accompany the dance being performed? If yes, make a list of them and where they are located.</i>
<b>• Photograph</b>	<i>Are there any photographs of the dance being performed? If yes, make a list of them and where they are located.</i>
<b>• Video</b>	<i>Are there any video clips associated with the dance performance, which is being recorded? If yes, make a list of them and where they are located.</i>



Photograph: Traditional dance being video recorded by international 'en-compass' scoping team NE England member in Kenya



Photograph: Photographic documentation of dance by 'en-compass' scoping team member in Hainan Province, China

## 7. Models to support research and interpretation of intangible and tangible artistic, cultural and heritage resources

The division between intangible and tangible cultural heritage is an artificial social construct. The illustration of the 'turtle' (Figure 6) can be used to help explain the integrated relationship between intangible and tangible cultural heritage that was understood to be the basic premise behind the safeguarding and conservation of heritage and cultural expressions and products. This relationship between intangible and tangible is important in the documentation, research, communication and interpretation of cultural heritage. When seen holistically this helps to provide a rounded and full meaning and context to cultural heritage. One cannot fully understand the tangible without the intangible and *vice versa*. This is why they are seen as being inseparable in the 'ecomuseum ideal'.

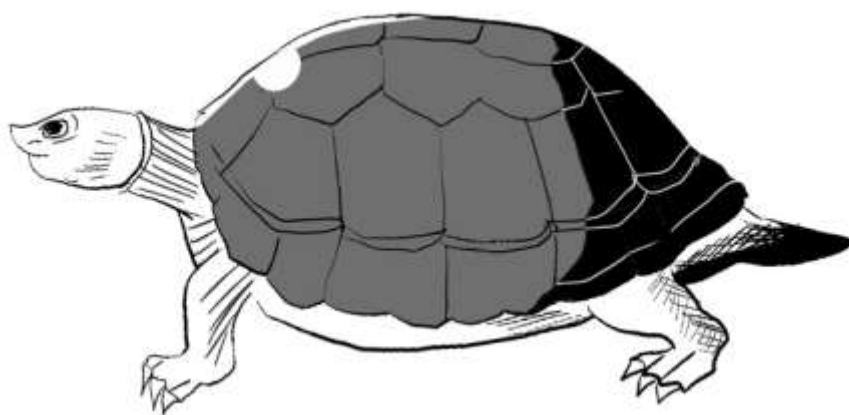


Figure 6: The 'turtle' as an illustration for the living relationship between intangible and tangible cultural heritage

With the illustration of the 'turtle', the living creature itself can be viewed as the life-force – and the life-giving – intangible cultural heritage and the shell can represent the tangible material culture heritage. In many ways cultural heritage is like the turtle where the creature and the shell are one entity. The 'turtle' is also symbolic of longevity and so is a fitting image to use where projects are intended to safeguard a living and organic cultural heritage.

With an understanding of what has been discussed in Sections 5 -7 above, an interwoven model is suggested to facilitate more detailed research and documentation on each heritage resource and the associated information, evidence and data recorded and documented on the data-collection template forms. This module is presented in Table 4. The purpose of this model is to try to establish shared notions of meanings and/or significance for individual heritage and cultural expressions and products. It is proposed that this can often be achieved through asking questions within, and across, the six main areas presented in the columns in the table (with the first three areas being phrased differently for intangible cultural heritage and tangible cultural heritage resources) and considering the five levels of data represented in the five rows of the model.

Table 4: A proposed model for more detailed research and documentation on individual heritage and cultural expressions & products

Intangible Cultural Heritage	elements of intangible cultural heritage 'activity'	arrangement of & transition between elements (sequencing)	overall style and/or genre			
Tangible Cultural Heritage	material	construction	design	function i. original ii. subsequent	history i. general ii. specific	environment i. micro ii. macro (with patterning)
'sensory' and observable data	<h1>Meaning &amp; Significance</h1>					
comparative data						
part-of-set data						
supplementary data						
cultural milieu data						

The six areas where one may find it useful to pose questions in relation to individual heritage and cultural expressions or products moves through looking at the expression or product itself, through to function/s, history and the environments in which it is found. These suggested key areas which can be used to frame questions to pose to the individual expression or product are framed in Table 5.

Table 5: Suggested six key areas in which to frame questions in the research model

1.	<p>In the first area of questioning, the smallest discernible 'individual' <i>features</i> of the expression or product are considered in detail:</p> <ul style="list-style-type: none"> <li>• with intangible culture heritage expression or performance, these may be the elements that when brought together constitute the whole; or,</li> <li>• with tangible and cultural products, the materials used in making a heritage or cultural product are considered in detail.</li> </ul>
2.	<p><i>Processes</i> are the focus of the second area of questioning;</p> <ul style="list-style-type: none"> <li>• where elements are placed into sequence with any recognised transitions between these elements within intangible cultural elements; or,</li> <li>• construction and manufacturing sequences in relation to making tangible heritage or cultural products.</li> </ul>
3.	<p><i>Form</i>, is the emphasis in the third area and recommends questioning in relation to;</p> <ul style="list-style-type: none"> <li>• style and genre with intangible cultural heritage; or,</li> <li>• design (including decoration) with tangible heritage and cultural products.</li> </ul>

4.	<p><i>Function</i> is the next key area of questioning and here two core considerations should not be neglected. These are that:</p> <ul style="list-style-type: none"> <li>• ‘function’ means more than simple use and can include a range of different purposes and values behind the expressions or products; and,</li> <li>• ‘function’ can, and often does, change over time and that it is important to consider original functions and/or purpose and any future changes and/ of developments in an expression or products function.</li> </ul>
5.	<p><i>History</i> is the fifth key area to ask questions about and these questions can be divided between:</p> <ul style="list-style-type: none"> <li>• the general history of a particular form or type of expression or product; and,</li> <li>• the specific history of each individual example of an expression or object.</li> </ul>
6.	<p>Finally, it is worthwhile asking questions about the <i>environments</i> in which the expression, or product, is located. Here, it is valuable to work from the micro outwards to the macro in considering the expression’s, or product’s, most immediate environment to viewing it within its larger physical, natural, economic, social, cultural and political landscapes. When looking at the expression or product at the macro level, ‘patterning’ can be studied; how many examples of the expression or product can be found within the larger landscape.</p>

When developing sets of questions across these six main areas, you may find that there is no closed division between each area and that networks of cross-over questions develop. The deeper the research goes into a particular expression or product, the more complex the network can become.

In the search for answers to the questions posed a range of data can be examined to help in informing the developing a set of answers. These levels of data are presented in Table 6.

Table 6: Types of data sources to be considered to develop answers

1.	<i>‘sensory’ and observable data.</i> This is collected through the direct experience of the heritage and cultural expression or product. This includes what can be seen, heard, touched, smelt or tasted.
2.	<i>comparative data.</i> This is collected by looking at similar expressions or products from different times or different places.
3.	<i>part-as-set data.</i> This is collected by considering a single example of an expression or product and its part within its immediate setting in relation to other natural and cultural, and intangible and intangible heritage resources.
4.	<i>supplementary data.</i> This is collected by looking at other sources of information and evidence that can tell us more about the expression or product. There are many examples of sources of this type of data. Examples would include oral testimonies, archival material, published material, photographs, films, etc.
5.	<i>cultural milieu data.</i> This is more of an understanding of the ‘big picture’ into which the example of how the particular heritage and cultural expression or product fits. For example, an understating of physical, biological, economic, social, cultural and political environments in which the expression or product is located, along with the relationships and connections between all of these.

With the careful development of the sets of questions and the use of available data sets to answer them, much can be learnt about meanings, significance and values that an expression or product has been invested with and by whom.

## 8. Model for small community-driven exhibitions

Following the work undertaken in the 'en-compass' project, a travelling exhibition was developed through consultation and negotiation. This could provide a model of what can go into an exhibition on safeguarding heritage under threat and how stakeholders and local people can get involved.

For the exhibition, 10 content panels, made of fire- and water-resistant printed fabric were produced. This allowed for the panels to be packed and moved easily between venues. The fabric panels were produced with brass eyelets placed at 200mm intervals around the edges (Figure 7). With these eyelets, the fabric panels could be 'laced' onto frames that were constructed by local venues.

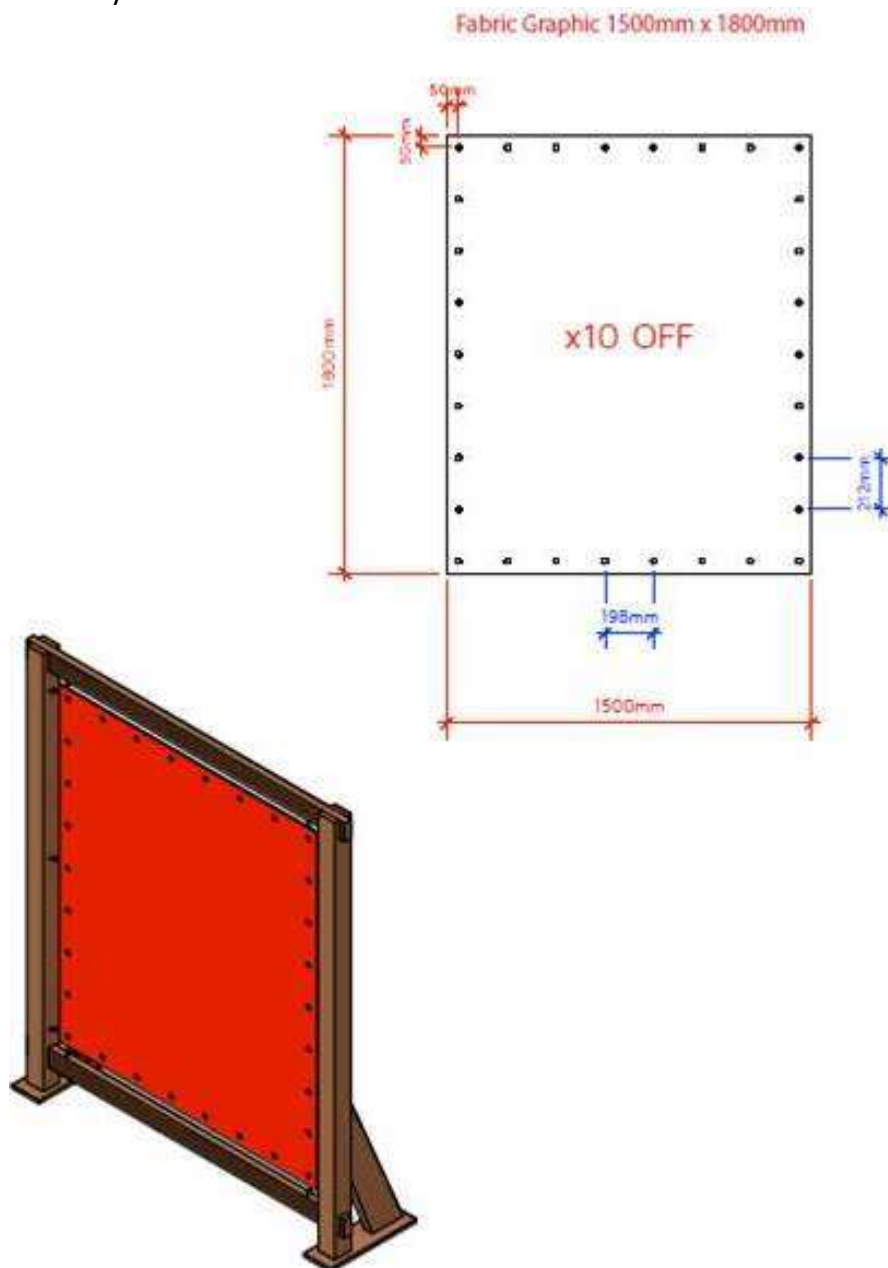


Figure 7: Frame for the display panels - 1500mm x 1800mm fabric panels

The whole system was very flexible and portable. It is also very 'modular' in design. All of this helped to ensure that it could be easily mounted in any size and configuration of rooms. The exhibition could be mounted as a 'whole' in a large museum gallery space, or divided up into smaller theme 'modules' that could be displayed in multi-small-roomed buildings. This type of modular approach makes it possible to have this type of exhibition in institutions from large museums to small community-centres.

Two vital aspects came to the forefront in this pilot project of scoping, documenting, recording, researching and promoting the artistic, cultural and heritage resources of the indigenous communities of the *Li* in Hainan, *Abasuba* and *Masaai* in Kenya, and *Makushi* in Guyana. The first vital aspect was the importance of focusing on 'traditional **ordinary everyday** cultural objects and expressions', as these are the artistic, cultural and heritage resources that people are starting to turn away from, with this being the major threat to the survival of these resources. The reason for this is that these artistic, cultural and heritage resources have lost so many forms of 'value' and 'meaning'. Through processes of globalisation and modernisation, these traditional skills, expressions and products are being perceived as no longer having the same worth and use that they had once had in the past. This sense of these resources now being 'obsolete' and 'redundant' has been magnified by these traditional skills, expressions and products being viewed as in some way 'primitive', by dominant cultures and people outside of the local area. By focusing on these more common aspects of culture and heritage, local people are able (re)affirm their tradition cultures and ways and help to restore the values of these. Secondly, once people have realised that there is interest in their everyday artistic, cultural and heritage resources, they will have an increased sense of pride and cultural identity that will encourage them to safeguard and promote these resources.

The five general panels on safeguarding heritage and cultural expressions and products, along with the five displays on particular topics, are included in this training manual as an example of the types of issues, processes and topics that can be chosen for a project following the overall process presented in Section 5, pages 21-25.



# Safeguarding Cultural Heritage



## Responding to the threat

En-compass is an international project with partners in China, Kenya, Guyana and the United Kingdom.

### The project aims to:

- Strengthen local support for traditional cultural heritage expressions and products under threat.
- Improve access to these products and expressions.
- Promote their safeguarding.



Jingju Opera in China



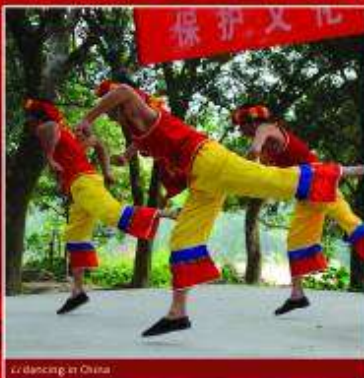
En-compass workshop in England

### This has been done by:

- Bringing people together from different parts of the world to work towards meeting these aims.
- Creating international teams to identify and document cultural heritage expressions and products under threat.
- Providing training for local people in the safeguarding and promoting of expressions and products.
- Making a database of examples of expressions and products available on the internet (<http://en-compass.ac.uk>)
- Developing a group of professionals to sustain the aims of the project.



Traditional textile techniques in China



Dancing in China



Wetso Women in South Africa



Morris dancing in England

Figure 8: Start of the display panel series on the project and 'Safeguarding Cultural Heritage'

# Are Cultural Heritage Expressions and Products Important?

- Are the stories your grandparents told you of interest?
- Do you enjoy watching traditional dance or listening to traditional music?
- Do you think it is important that younger people are given the opportunity to experience and enjoy traditional crafts and performances?



- Would you like to know how to make a piece of cloth using traditional skills?
- Do you think traditional skills and processes threaten progress?
- Can traditional and contemporary expressions and products exist side by side?

- Do your traditional expressions and products have value in today's society?
- How would you feel if your traditional expressions and products disappeared?
- Would it be alright if the language of your parents died out?



Figure 9: Second in the panel series that will get the viewer to consider the importance of heritage

# Yes! Cultural Heritage Expressions and Products are Important!

- They make the world a richer place.
- They help us understand our cultural background and can provide us with a sense of identity.
- We can be proud of them.
- They provide us, and especially the young, with a sense of belonging.



- They can provide work for those people who have the skills to create heritage expressions and products
- They can be used to attract tourists
- They are often still the best way of doing things
- They help promote sustainability and stability

- They help us understand other people better and see what we all have in common
- They enable us to celebrate cultural diversity



Figure 10: Third in the panel series that explains the importance of everyday heritage

# Safeguarding Heritage

## What is being done?

### International efforts

Do you know about the United Nations Educational, Scientific and Cultural Organization's (UNESCO) international efforts to safeguard cultural heritage expressions and products?

There are many international agreements and conventions that encourage nations and communities to protect their heritage. UNESCO has drawn up several of these, such as the 2003 Convention for the Safeguarding of Intangible Cultural Heritage and 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions. Nations can decide themselves whether or not they want to follow these conventions.

Nations that sign the 2003 Intangible Cultural Heritage Convention agree to look after the intangible cultural heritage in their countries. They can do this by keeping information about the different types of heritage products and expressions. It is important that they work with local communities, groups and heritage practitioners. They need to develop plans to make this happen. Also, they need to promote respect for and awareness of intangible cultural heritage and of the communities, groups and individuals who practice them.

Nations that sign the 2005 Diversity of Cultural Expressions convention agree to protect and promote the diversity of cultural expressions within their countries. It is important that different cultures are respected. People from different cultures should be able to freely interact with each other in a peaceful way that is of benefit to all.

Together, these two conventions support the link between culture and sustainable development.



Museum display of Li face tattooing in China



Spice preparation in China

### Safeguarding in action | Activities and actions

#### Laws to protect heritage in China

The People's Republic of China has many different types of intangible cultural heritage resources. However, these resources are disappearing or have already disappeared. To help protect those that remain, the country created the 'Intangible Cultural Heritage Law of the People's Republic of China' in 2011. The law focuses on the different types of work the government can do to make records about intangible cultural heritage and how to protect and promote this heritage. It aims to raise awareness among government officials about how to protect them. The law gives an important role to the people who carry the intangible cultural heritage traditions and knowledge so they can help to protect them better.

#### Non-Governmental Organisations: Makushi Research Unit

Established in 1995, the main purpose of Makushi Research Unit in Guyana is to study and revive the traditional way of life of the Makushi people. Most of the researchers are women from the local communities. This is the first unit of its kind among Amerindian women within Guyana. It focuses on language, food, craft and ethno-medicine, hunting, fishing and farming. It has played an important role in affirming cultural values. It has worked with the Ministry of Education to develop Makushi language teaching in schools. The Makushi Research Unit produced an important publication on sustaining the Makushi way of life and many other booklets and educational and social awareness materials on birds, cassava, fishes, wildlife, domestic violence and alcohol.

#### Non-Governmental Organisations: Abasuba Community Peace Museum

Non-Governmental Organizations play an important role in the management and conservation of culture and heritage in Kenya. The Abasuba Community Peace Museum is a good example of this. Jack Obonyo established the museum in his desire to protect and promote the unique culture and heritage of his people, the Abasuba. He has collected and displayed Abasuba cultural artefacts and has also liaised with local elders and the youth to encourage the protection of local Rock Art sites. It was one of the first community museums in Kenya and is now ran by the local authority supported by the National Museum of Kenya.

#### Non Governmental Organisations: Etwall Well Dressing Association

The decoration of wells is practiced in some parts of rural England during the summer. This involves decorating water sources such as wells and springs often with religious themes. The designs are traced on to clay that has been smeared onto a wooden frame and then filled in with natural materials; mostly flower petals and mosses, but also seeds and beans. It is believed that people started this custom over 800 years ago to give thanks for the purity of the water drawn from wells. This tradition is kept going by public associations such as the Etwall Well Dressing Association which started in 1970.



Li textile techniques in China



Makushi basket weaving in Guyana



Cotton making in Guyana

Figure 11: Fourth fabric panel in the display series, with a focus on 'what is being done'

# What Can You Do?

There are many people around the world who help to protect heritage. Here are some of them:

## Tanzania

'Hi, I am Justin Romani from Tanzania and I am passionate about protecting our heritage so that people will be able to experience and enjoy it long into the future. I encourage this through my tour company called 'Ancient Ost Afrika Limited' which takes visitors to many places in Bagamoyo Old Town such as the Livingstone Tower and the Arab settlement from 800 years ago.'

## Guyana

'Hello, I am Ozzie Hussein from Guyana. As an Amerindian I believe that we need to promote spiritual art forms among our people so that future generations know that this heritage belongs to them. I do this through my work as an experimental sculptor on different types of wood, which tells our stories and legends from long ago.'



Heritage safeguarding workshop in Guyana



Workshop with examples of Meacuity basketware in Guyana

## China

'Nǐ hǎo, I am Kaiyao Lin of Li ethnic group in China. I am a folk and industrial artist and also an expert in Li textile techniques. I have been working hard for many years to safeguard Li traditions. I have been the Director of the Hainan Research Institute of Li Textile Techniques.'



Li cultural performance in China

## UK

'Hiya, I am Chris Bostock and I am a storyteller from the north of England. I believe passionately that we can use storytelling to celebrate language and oral traditions. I work with school children and with members of the public to promote the transformation of mind and spirit through myths and legends.'



Students learning to use musical instruments in China



Li pottery making demonstration

## How You Can Help?

You can help by:

- understanding the value of traditional cultural heritage expressions and products
- identifying which of these are under threat and discuss this with other people that you know
- finding out which organisations work towards the safeguarding of traditional cultural heritage expressions and products
- getting involved in projects and initiatives that are trying to safeguard cultural heritage
- starting your own safeguarding project if that is appropriate

## Acknowledgements

The en-compass project, which produced this exhibition, has benefitted from the input and support of a wide range of people and organisations. It is not possible to identify all of them but we send our heartfelt thanks to all of those who have contributed to the project. We would, however, like to acknowledge the funding from the European Commission which made this project possible and the input from our project partners, in particular Shaoling Tan (Hainan Provincial International Cultural Exchange Centre), Deirdre Prins and Peter Okwaro (Centre for Heritage Development in Africa) and Dr Raquel Thomas (Iwokrama International Centre for Rainforest Conservation and Development). At Newcastle University, we have received sterling support from Dan Chen, Chris Hoy, Karen Scrivens and Thereza Webster. Finally, our thanks are due to the en-compass participants, workshop attendees and MA students for their enthusiastic support of the project.

Figure 12: Fifth fabric panel in the display series, with a focus on 'what you can do'

# Food Procurement, Preparation & Consumption

## Food: Obtaining, Preparing and Consuming it

Everybody needs food. Traditionally, people have obtained food by gathering, fishing, hunting, keeping livestock and growing crops. This has involved having a good knowledge of nature and especially of animals and plants.

Traditional ways of getting food have required different methods and implements. People have needed to know and use these different methods in order to survive. They have also needed to learn and pass on the traditional skills required to make and use the necessary implements.

The preparation of food requires specific knowledge and skills. For example, it is sometimes important to know how to remove poison from different foodstuffs such as cassava plants and some animals.



Cassava preparation in Guyana



Cooking couscous in Senegal



Fish traps in Senegal



Selling pheasants in China



Making a vessel for food preparation in China

With the discovery of fire people started to use heat to prepare and cook food. Later, the development of containers made of fired clay and other strong materials like metals and glass allowed people to prepare a wider range of food.

People have used various types of implements to eat food.

- Do you use any implements to eat?
- What do you normally use - chopsticks, spoons, knives, or forks?

To begin with, these implements would have been shaped from natural materials, such as wood and bone.

Later, they would have been made out of fired clay and metals.

## Food & Containers

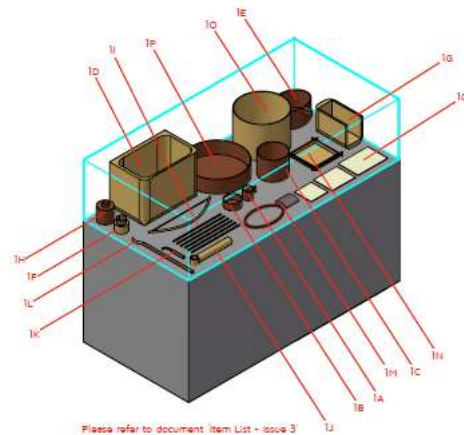
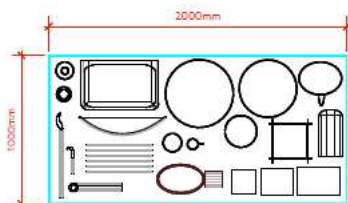
Containers play a special role in all cultures. They have been used to collect, transport, store, cook and consume food, and to drink from. People have made containers from many different types of materials.

In this exhibition, you can see containers made from calabashes, latex, woven baskets and fired clay.

Making these containers would have required different traditional skills.

- What food containers have you used today?

Case 1 - Food Procurement



Please refer to document Item List - issue 3 for item codes and photographs.

Figure 13: Display panel and case design for food procurement, preparation and consumption

# Clothing & Textiles

## Clothing & Textiles

People have been making clothing for thousands of years. They have used many different types of materials to make their clothes. Until recently, these materials all came only from animals and plants. These include leather, wool, bark, cotton, silk, hemp and grass.

- Can you think of any other natural materials that could be used for making clothes?

People have also used these materials to make other items. These include items to keep themselves warm, to sleep on, and to carry things in.

Woven textiles are a popular material for making clothes. Traditional weaving, using looms, is found in many cultures around the world.

Traditional ways of producing handmade textiles include knitting, quilting, embroidery and other forms of needlework.

- What are the clothes you are wearing today made out of?
- How were they made?



## Messages: Colours and Patterns in Textiles

People have communicated messages about themselves and their cultures through the clothes and textiles they wear and use. Certain colours and patterns convey different messages. They are 'symbolic' and express 'meanings'.

- What symbols and meanings do you think you can find in the textiles in this exhibition?
- What symbols and meanings are there in the clothes you are wearing and those of the people around you?



## Weaving Process: An Example of Textile Making

The weaving process includes:

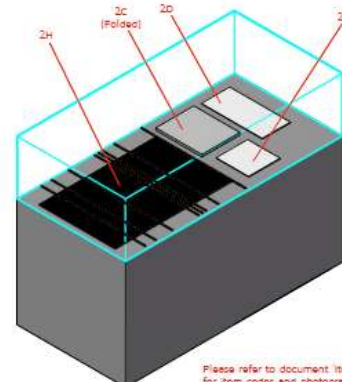
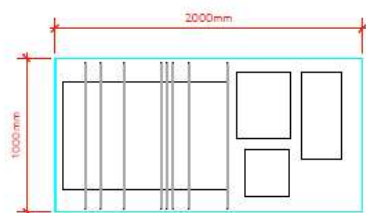
- Collecting and preparing fibres from animals or plants
- Spinning these fibres into threads
- Colouring the spun fibres
- Deciding which patterns to make using different threads
- Setting up the loom
- Hand weaving with cross threads

Although looms may vary, weaving involves similar sets of skills across cultures.

- Have you ever seen a loom being used to weave cloth?



Case 2 - Clothing & Textiles



Please refer to document Item List - Issue 3 for item codes and photographs.

Items Require Hannequin (x3): 2A, 2B, 2C  
Item Dooley TSO: 2E

Figure 14: Display panel and case design for clothing and textiles

# Adornment & Decoration

## Decoration

Through the ages people have decorated their bodies, their possessions and their homes.

People have marked their bodies through tattooing and the use of dyes and paints. They have also decorated themselves with adornments such as headpieces necklaces and bracelets.



## Messages: Personal Adornment

People have communicated messages about themselves and their cultures through their body-markings and the decorative items they wear and use.

Certain raw materials, colours, patterns, and shapes convey different messages. They are 'symbolic' and express 'meanings'.

- How do you decorate yourself?
- What messages do you think you are communicating to other people through your clothes and the decoration you wear?

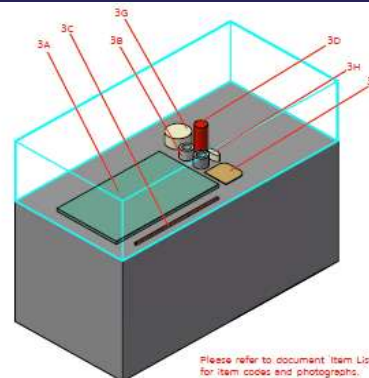
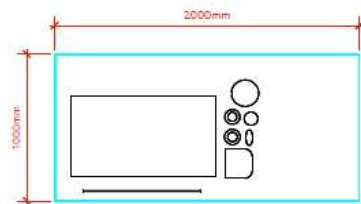
People have also decorated the objects that they use in everyday life. Decorating objects gives them distinguishing marks. Sometimes this is linked to individual ownership and personal tastes. Other times, decoration is used to reflect group or shared meaning.

People also decorate their homes. This is done both inside and outside. Outside, this can be done through the shape of the houses and through the materials, patterns, and colours used.

Inside, this involves various different furnishings and ornaments and their placement in the home.



Case 3 - Adornment & Decoration



Please refer to document 'Item List - Issue 3' for item codes and photographs.

Items to be included but not shown:  
3E, 3F, 3J, 3K, 3L

Figure 15: Display panel and case design for adornment and decoration



# Performance: Storytelling, Music, Dance & Ceremonial

## Intangible Cultural Heritage

Intangible cultural heritage is the way we think and express ourselves. It is our knowledge for making and doing things. All these are interlinked. Intangible cultural heritage is in our daily lives.

### It is in our:

- Belief systems
- Language
- Oral traditions and stories
- Poems
- Music
- Songs
- Dance
- Craft skills
- Even everyday routines!



Storytelling in England



Haka dancing in New Zealand



Haka dancing in New Zealand



Haka dancing in New Zealand

We use many of these elements to celebrate and communicate important times and events in our cultural lives.

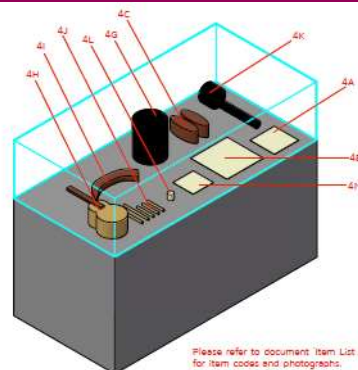
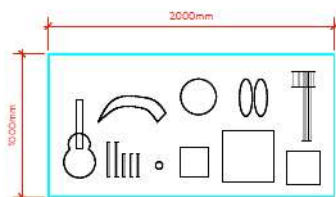
### These take the form of:

- Festivals: marking important times of the year
- Commemorative celebrations: marking important historical events
- Ceremonies: marking different phases in the lives of people and their communities
- Religious rituals: marking spiritual beliefs and practices

• Which intangible heritage expressions are most important to you?

• Is there a festival or celebration that is especially important to you and your community?

Case 4 - Performance, Storytelling, Music, Dance & Ceremonial



Please refer to document Item List - Issue 5 for item codes and photographs.

Items to be included but not shown: 4D, 4E, 4F (Hennacquin required?)

Figure 16: Display panel and case design for performance

# Built Environment

## Structures

People build structures for different purposes. Walls are used to divide land and to separate animals from each other. Buildings are constructed as homes and as working and community meeting places.

Different cultures favour different types of building materials and methods of construction. Some cultures prefer building their walls out of stone or with stone and mortar. Others used stick frames covered in clay, or baked clay bricks.

Wood was also an important resource for building structures. Roofs were often made out of thatching materials like palms, reeds or grass. In some communities stone, clay tiles or slate are also used. Using different materials and different construction practices require different skills.

These skills are often specialised and are passed on through generations from masters to apprentices. With modern construction techniques many of these specialist traditional skills are being lost.



- Have you seen any traditional structures during the last year?
- How do you think we can save traditional skills?



Fig 17: Display panel and case design for built environment

## 9. 'en-compass' as a pilot project for placing heritage and the creative and cultural industries at the heart of sustainable development

A great deal of work has already been done in many countries, including those involved in the 'en-compass' project, to safeguard vital elements and aspects of intangible and tangible heritage, cultural and artistic expressions and products. This is a positive start, but can many more people become directly involved in helping to ensure the survival of the intangible and tangible heritage, cultural and artistic skills and products that are representative of their communities and identities? In relation to this, can the characteristics and guidelines of the 'ecomuseum ideal' play a role in this?

In an attempt to answer these questions, this Manual has considered some of the key UNESCO instruments and frameworks for "protecting heritage and fostering creativity" and for placing culture at the centre of sustainable development. It has reviewed the 'ecomuseum ideal', which it proposes shares many similarities with UNESCO's tenets, goals and recommended approaches, especially in relation to all the safeguarding measures and activities. It has been suggested that these safeguarding measures and activities can be achieved by employing an 'overall heritage management process model', which has at its core a number of research and documentation stages that can be part of a cyclical programme of ongoing documentation that does not 'freeze' culture. This ongoing programme of documentation would record changes over time, thereby organically 'preserving' cultural heritage elements as they evolve while at the same time releasing them to become resources that can be used innovatively in the contemporary creative and cultural industries. The 'en-compass' project has been provided as an example of a real project that has endeavored to encourage the use of ecomuseology and the 'overall heritage management process model' to stimulate and support safeguarding activities in different parts of the world. Finally, two illustrations have been presented to help clarify two principal concepts that can only but benefit ecomuseum-like safeguarding programmes. The image of the 'turtle' can be used to represent the integrated nature of intangible and tangible heritage elements, but with the intangible being the life-force. The image of the 'four-legged stool' represents the power of bringing 'stakeholder' groups together as equal partners in the decision-making, planning and implementation processes.

The 'ecomuseum ideal' does have potential for safeguarding intangible cultural heritage elements within a holistic integrated system, which does not separate them out from the rest of a culture. This potential is maximised when the system encourages community participation throughout and is informed in practice by an 'overall heritage management process model' that has a central ongoing programme of documentation and research. With ongoing documentation and research taking place, a balance between conservation and entrepreneurial creative evolution can be aimed for in equal measure. To achieve this, the three pillars and twenty-one characteristics of the 'ecomuseum ideal' can be viewed as possible guidelines for integrated heritage management worthy of consideration. There are similarities between them and the Liuzhi Principles. However, are they all appropriate for the various situations in the People's Republic of China – maybe not? This is where the third pillar of the 'ecomuseum ideal' comes to the forefront, where it says that the "ideal is not an absolute model, rather it is a 'malleable' and flexible outlook and should be responsive to, and 'shaped' by, the specific local contexts and needs". This resonates with the eighth Liuzhi Principle that states that "there is no bible for eco-museums. They will all be different according to the specific culture and situation of the society they present".

Surely at least some of the pillars and characteristics of the ‘ecomuseum ideal’ have currency as a set of broad guidelines for the safeguarding of significant elements and aspects of intangible and tangible cultural heritage resources and practices. It is believed that they can indeed have value. Yes, the characteristics and guidelines may require adaptation and there may be the need in certain countries to create some that are more apt for the circumstances there. However, the philosophies and practices of the ‘ecomuseum ideal’ are worth considering. Finally, even if an ecomuseum-like philosophy, along with a set of associated practices, is developed and adopted, it does not mean that the term ‘ecomuseum’ has to be included in the name of any heritage safeguarding project. For example, in countries like the People’s Republic of China, ‘ethnic cultural villages’ and ‘intangible cultural heritage villages’ share a number of the characteristics of the ecomuseum ideal, although they bear different titles. What heritage safeguarding projects are called will most likely be dependent on the current agendas and desires of the funders at the time when the projects are initiated and funding is being sought.

## Acknowledgements

In relation to ‘*en-compass*’, the project would not have been possible without the support and funding from the European Commission through the ‘Investing in People: Access to local culture, protection and promotion of cultural diversity’ scheme

## Endnotes

1. It is hoped that this Manual will be of some use to a readership that is potentially broad in scope and might include community representatives, government officials, professional heritage managers and academics. It is not meant to be an overly theoretical academic piece.
2. In the main text UK English spellings have been used. However, within the quotes the original spellings used by the authors have been included. The UNESCO and some of the articles and books have used American English. In addition, in the English version of material produced by Chinese authors, the term ‘ecomuseum’ is often presented as ‘eco-museum’.
3. Certain words in some of the quotes and statements in the text of the training manual have been placed in **bold** typeface. This has been done to highlight and draw attention to fundamental ideas.

## Expanded Bibliography

(Although not all of the items below were made reference to directly in the text of the training manual, it was felt that for the particular audience of the manual a more extensive bibliography may be useful and so some additional entries have been included.)

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Photograph: Traditional furniture skills in Kenya



Photograph: Makushi male community-leaders headdress



Photograph: Cultural exchange and documentation about traditional Li weaving