

ICOM-IMREC
RESEARCH PROPOSAL TEMPLATE

***International Research Alliance on Public Funding for Museums
(IRAPFM)***

By the Chair on Museum Governance and Cultural Law (UQAM), as Lead Partner

1. Abstract (half page / 250 words maximum)

To answer the questions asked by ICOM-IMREC and arrive to answers and solutions, the *International Research Alliance on Public Funding for Museums* (IRAPFM) is under the direction of a team:

- The Chair on Museum on Governance and Cultural Law (UQAM) as lead partner,
- Brazil, Canada, New Zealand, and Spain as institutional partners,
- India and South Africa as additional individual international researchers.

The research will be conducted in two complementary stages.

First, a statistical survey will be sent to the 124 ICOM National Committees and the corresponding museum's supervising Ministries, on the state and recent evolution of public funding for cultural institutions.

In a second step, a qualitative analysis will be carried out from a selection of various museums proposed by the Consortium members (25 museums per region). This qualitative survey will allow us to better identify the main factors having an impact on public funding, and the operation of museums. Looking at the realities on the ground, specific to a continent, a region, a country, these data will furthermore measure the disparities between countries, as well as the disparities between the official discourse and what the Museums associations have communicated. Finally, the collected answer will allow us to identify funding strategies developed by museums.

The report will address recommendations to museums, funding agencies, national governments as well as regional or international bodies based on the qualitative surveys. To disseminate these answers, IRAPFM will propose some series of webinars following the outstanding work done by *ICOM Define: Standing Committee for the Museum Definition* with webinars. IRAPFM will work with museums associations and local partners identified along these surveys, establishing think tanks and some global network.

2. Description of the proposal (5 to 8 pages / 4000 words maximum)

Problem Statement

Public funding has always been one of the foundations for the development of museums. From a historical point of view, State support has enabled the emergence of the European museum model, which aimed to give the general public access to national treasures and heritage (Pomian, 2020). Without going into the details of this history, which began in the Renaissance and really took off in the Enlightenment, many historians and researchers recognize the fundamental role played by museums in the democratization of culture and the impetus they gave to popular education. It is therefore not without reason that museum visits have been widely encouraged in recent decades by most States, which, of course, see them as an institution dedicated to culture, whether artistic, scientific, scholarly, or popular. Prior to the COVID-19 pandemic that shook the world in 2020, museum attendance statistics showed steady growth. While 19th and 20th century museums gradually reached wider audiences, museums acquired the status of mass media at the turn of the millennium. It is therefore not surprising that governments have made national

museums instruments for the development of national identities and consequently institutions specific to cultural diplomacy. We need only think of international agreements for the circulation of major exhibitions, or projects like the Louvre in Abu Dhabi, inaugurated in 2017. It can be seen that museums have become key players in culture and the economy for States. The economic spin-offs of major exhibitions on tourism therefore motivate public authorities to invest in the maintenance and development of museums.

If the various levels of government (States, provinces, cities and regions) have created public museums which constitute the founding model and the heart of the museum network, we have also seen a proliferation in recent decades of private museum projects initiated by communities (interpretation centers, exhibition centers, ecomuseums, neighborhood museums) and businesses (ecomuseums). This diversity has given rise to new management models that oscillate between public museums financed by the various levels of government, private for-profit museums (wax and entertainment museums, corporate museums) and established museums in a non-profit organization (NPO) based in particular on the social economy (Pearse, 1991). Consequently, there are today several variations of these models, which constitute hybrid forms of financing between public and private (Hervé, Mencarelli, Pulh, 2011). In the long history of museums, never has there been such a wide variety of museum management models. François Mairesse identifies three types of logic that structure the financing of museums: market logic, logic linked to public subsidies and donation logic (Mairesse, 2022).

Since the global financial crisis of 2007–2008, we have observed major transformations in the methods of financing museums. While some governments have chosen to invest less money in the museum network, independent revenue (ticketing, room rentals, sponsorships, etc.) has become the key to development for many museums (Bergeron, Dumas, 2006). In the United States, for example, museum foundations lost significant sums during the crisis, but the capital was rebuilt due notably to donations from patrons and citizens. There has been a significant increase in the number of subscribers and friends of museums. Citizens' mobilization saved many US museums from closing. It has also been observed, in the years that followed, that North American museums, for example, which overcame the crisis, could count on a solid network of friends and volunteers (Lessans Geleir, Salamon, Mengel, 2010). In these so-called community museums, the volunteer staff has been maintained, unlike state museums and private museums, which have seen their financial resources decrease. Museums created and defended by communities have reminded major museums; while tourists generate the most important income, local audiences ensure the permanence of museums in times of crisis. In this context, it is perhaps no coincidence that the values of the new community-oriented museology have emerged over the past two decades to the point where the International Council of Museums has chosen to equip itself with a new definition of what a museum is. The debate at the ICOM meeting in Kyoto in 2019 is a good illustration of this change in values within the international community (Giraud, Orellana Rivera, 2020). If the audacious proposal of Kyoto was not adopted, it nevertheless initiated a profound change by valuing the social role of museums so that the new definition adopted in Prague in 2022 testifies to a profound change in museum culture (Sandahl, 2019).

A trial of trust

Many researchers are interested in what is changing in the world of museums. Research on the societal trends that are transforming museums has multiplied over the past two decades (Robert, 2009; Davis, Mairesse 2015). However, the transformations have accelerated with the pandemic crisis, forcing museums to close their doors, or to put an end to educational and cultural activities. Own-source box office revenues have melted like snow in the sun, and sponsors for exhibitions, school and cultural programs have ceased to support museums. Some governments have

demanded that museums reduce their expenses as much as possible by cutting posts and rethink their distribution methods by turning to digital. Staff with precarious status, assigned to educational services, have lost their positions (Bergeron, Baillargeon, Bosset, 2020). Other governments, such as Canada in particular, have chosen on the contrary to invest more to compensate for the losses incurred by museums by betting on the social role of museums and hoping for a post-pandemic recovery. It seems that state policies vary considerably and that there have been different strategies to safeguard the museum network.

While the health crisis has affected all countries, and while activities have started to resume in 2022, the war in Ukraine and the ensuing energy crisis are complicating the financial and logistical balance of European museums. To this geopolitical problem is added, as in 2007–2008, an international financial crisis that causes inflation and economic instability, the outcome of which is difficult to predict. In short, in this context of health, economic, political, and social crisis, culture and museums, in particular, are weakened. Therefore, it seems essential to conduct such an international survey to identify possible solutions to a world that is posing more and more challenges.

Research Question

The call for proposals highlights that research conducted between 2018 and 2021 reveals that declining public funding has become a serious problem that threatens the sustainable and equitable development of museums around the world. Let us recall here the questions to which ICOM-IMREC would like the research teams to provide answers and possible solutions.

- What does the term “public funding” currently encompass and how is the term understood across the globe?
- Is declining public funding for museums a global phenomenon?
- Where, to what extent and what kinds of declines are occurring? With what impact?
- In areas where reductions are occurring, how are museums responding? Are there discernible trends emerging from new business models?

These questions should be explored with reference to each of the major regional areas (South America, North America, Europe, the Middle East, Africa, Asia) so that comparisons can be made. Considering the context of the crisis, four main questions emerge. It seems that the definition of “public funding” does not have the same meaning for all ICOM member countries. Distinct political regimes and economic models as well as new categories of museums generate different conceptions of the role of governments. It will be interesting to identify these different conceptions from a geographical and political perspective. It is undeniable that the so-called national museums, therefore created and financed by the States, are at the origin of the definition of public financing. Moreover, the large number of private museums, but supported by various government programs (culture, science, and tourism for example) have a different conception of public funding to which is added private funding consisting in particular of independent funding comparable to that of cultural industries. As we will see in the methodological section that follows, we want to take national museums into account first, since they play the role of a model for the museum network. They stand as barometers for all museums.

The statistical survey sent to the line ministries and to national groups of museums will also make it possible to qualify ICOM’s observation on the drop in funding for museums according to regions and government policies. This comparative approach between the vision of States and that of museum professionals will make it possible to identify the issues and challenges facing museums. The survey will also provide leads to identify the most innovative strategies in terms of financing and governance.

The team of the Research Alliance on public funding for museums is based on the experience of the principal researcher who worked for more than 15 years with *the Observatoire de la Culture*,

attached to the *Institut de la statistique du Québec*¹, and on the expertise in management and law of the members of the Research Alliance who combine three disciplinary approaches: museology, management, and cultural law.

Theoretical framework - A multidisciplinary approach

A review of the curriculum vitae of the members of the Research Alliance will show that the team has interdisciplinary research expertise in museology on trends, museum management and governance, and cultural law. Several team members have researched and published on museum management. Many have careers in museums or have worked in national associations so that they are aware of the culture and the major transformations in the world of museums. It should be noted that most are attached to ICOM and can therefore count on an international network of museology researchers. This is why the bibliography bears witness to statistical (Bergeron, Merrigan), anthropological (Roigé), financial studies (Baillargeon), legal (Rivet, Labadie) social (Menezes de Carvalho) perspectives and approaches specific to critical museum studies (Hoffman, ICOM researchers).

Methodology and data collection

For this type of survey, the relevance of the analysis and recommendations is above all based on a rigorous methodological approach to the data, making it possible to collect the most relevant and representative information, considering the diversity of the international network of member museums of ICOM, and of different models of museum governance.

The investigation will be conducted in two complementary stages. First, a statistical survey of ICOM member states and national museum associations. In a second step, an analysis by non-random sampling will be carried out from a selection of museums proposed by the team's researchers in different regions (Europe, North America, South America, Middle East, Africa, Asia—Pacific) and will take into account the three major categories of museums (art, society, and science) funded and recognized by the various levels of government. This qualitative survey of museums will make it possible to better identify the main factors having an impact on public funding and the operation of museums. The objective is to identify and document new financing and management models.

As far as methodological choices are concerned, the team's frame of reference is *Survey Methods and Practice*, by Statistics Canada. The members of the Research Alliance have undertaken the structure of the questionnaire which will be administered by a team of young research professionals who will make sure to follow up with the responding museums if necessary. The committee will select a corpus of museums judged to be representative according to the three main categories of museums (art, society, and science) by region.

Step 1: Statistical survey - A double look at the public funding of museums

Considering the objectives and the duration planned for collecting the information, we drew inspiration from the two recent surveys carried out by UNESCO "Museums around the world facing the COVID-19 pandemic" published in 2020 and 2021. An online questionnaire will be produced in order to reach, on the one hand, the line ministries of all the countries which have created an ICOM national committee (126) taking into account the breakdown by region. In addition to the line ministries, we believe it is appropriate to administer this same questionnaire with the national committees. Why this double look? We believe there might be a discrepancy between the responses provided by States and the responses of representatives of national museum associations concerned about the future of the museum network. These associations must defend both national museums and other museum models. This is why we believe that it is

¹ You can consult the 111 reports, 3 of which were written by Yves Bergeron and Suzanne Dumas (books 1, 5 and 10) on the inventory and the economic impact of museums and heritage on the Statistical Institute website : <https://statistique.quebec.ca/en/fichier/cahier-1-premier-regard.pdf>.

useful to have this double look at the state of museum finances in the perspective where one of the objectives of the survey is to identify the issues and impacts of public funding. This statistical survey should highlight the points of convergence and divergence between the vision of the States, and the wishes of the professional communities. It should be noted that we are planning a pre-test to validate the response categories to the closed questions and ensure the quality of the responses obtained.

The questionnaire which should be administered at the beginning of 2023 will make it possible to draw up an inventory of public financing for the year 2021–2022 in comparison with the year 2019 (pre-pandemic) which we will consider as a reference year for measure changes. We want to identify the percentage of public funding, taking into account the percentage of own-source revenue (ticketing, sales of derivative products, room rentals, sponsorships, etc.). By identifying the percentage of inflation per country, we will be able to determine whether there has been an actual increase or a decrease in public funding. In addition, we will be able to identify the different consequences of these changes in museum funding on salaries, job losses, contracts, exhibitions, educational and cultural activities, opening hours, attendance, membership, as well as relations with financial, scientific and community partners. The last part of the questionnaire will be devoted to innovative strategies to counter funding cuts and increase museum revenues.

The database will be hosted on a secure university server in Canada and the data shared on the intranet with the team members. The data collected will be validated first by the research team and then by the ICOM National Committees concerned.



ICOM 124 national Committees

Step 2: Qualitative survey - New models

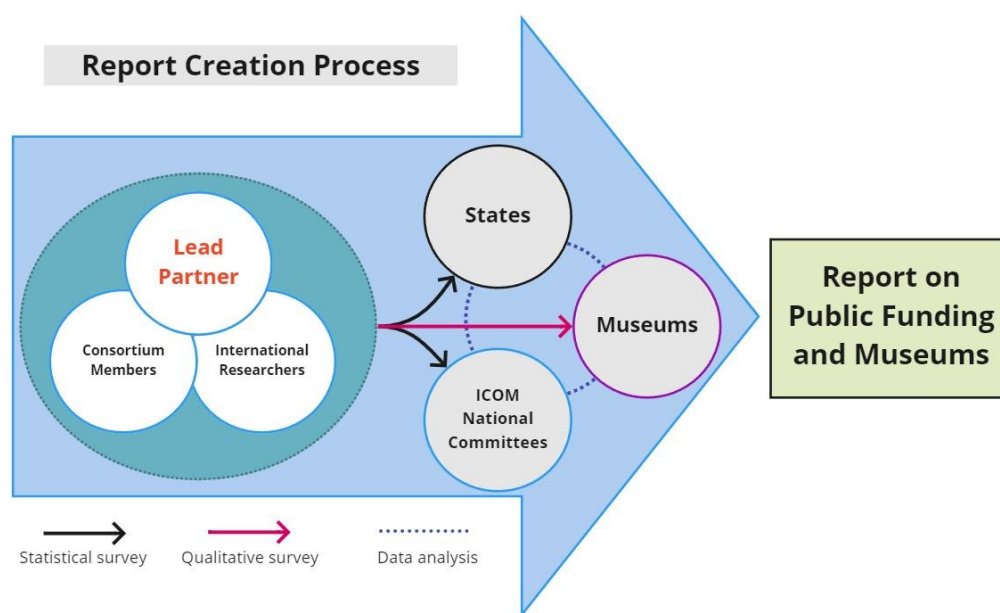
In parallel with the statistical survey that will be used to establish an inventory of trends observed on the international scene, we are planning a second survey to provide answers to the statistical data. In September 2022, we undertook exploratory research on trends that will make it possible to compile an international review of the literature on museum funding since 2019, which will be considered the reference year. This literature review, which benefits from the network of ICOFOM researchers and researchers from the School of Management Sciences at UQAM, will be useful for analyzing the results.

From the statistical survey and research on trends, we will compose a representative subgroup of 20 to 25 museums per region. These museums will be selected by the international research team insofar as they are distinguished by their policies and strategies for ensuring the financing and management of museums. We will conduct interviews with museums that demonstrate originality and that have proposed solutions to the problem of museum funding.

Collaborative Approach

For each step, the Research Alliance intends to adopt a resolutely collaborative approach. Initially, the questionnaire will be developed by members of the Research Alliance and administered by a team of young research professionals who will ensure that respondents are followed up as needed. Alliance members will be responsible for analyzing the data collected for the major areas

they represent. Then, we will consult with ICOM National Committees to ensure the validity of the data collected and their interpretation. Regular meetings are planned for each stage of the research. This analysis will also be supported by researchers in management sciences who will be able to come and discuss and validate the analysis to cover all the issues. Data analysis will make it possible to identify the management models that stand out and that are emerging in different regions, making it possible to plan a face-to-face consultation. We will therefore carry out interviews to document these typical cases. As for the first stage, the relevance of the case studies will be validated by the members of the Alliance as well as by experts from the School of Management Sciences who will contribute to the writing of these case studies.



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Expected Results

It appears difficult to assume the data that the statistical survey will reveal, because it is this first step that will determine the choice of museums selected for the qualitative survey. What also seems fundamental to us is to be able to draw up an inventory that reflects the overall reality of public funding of museums. As for the qualitative survey, it will make it possible to identify the trends emerging on the international scene. We will thus be able to draw an overview of the different funding models by identifying the museums that are innovating to identify good practices. That being said, the quality as well as the relevance of the expected results will be based on the collaborative work within the research team.

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3. Description of the social impact and actions to promote the results of the project (1 page / 500 words maximum)

Social impact of the research

The general statistical data that IRAPFM will collect will make it possible to identify what should be understood by “Public Funding”. Looking on the one hand at the realities on the ground, these data will measure the disparities between countries, as well as the disparities between the official discourse and what the Museums associations have communicated. This analysis will thus contribute, on the other hand, to raising the awareness of the communities and will allow, if required, approaches and claims with funding agencies, with national governments, as well as regional or international bodies.

The qualitative data collected is also of prime importance. The 25 museums selected by each of the members of the Consortium and international experts will allow the collection of data and information and will encourage dialogue and pooling. IRAPFM has chosen these different partners with great care; They come from different cultures, languages, and continents. Most certainly, if indeed the answers are different depending on the type of museum, these answers could also be different depending on the solutions adopted. It will be very interesting to analyze it. These answers will serve as examples and models to other museums. In a way, these will be laboratory experiments that could be disseminated on a larger scale. A hypothesis: It is generally accepted that social museology plays an important role in Brazil. Can we think of original solutions, of “imagination in power”, in the responses that IRAPFM will receive from Brazil museums? The question arises for each of the museums that will be approached. Moreover, throughout the drafting of the report, the members of the consortium as well as the international researchers will be called upon and work together. Already, ideas will circulate, solutions will be exchanged.

Proposals to disseminate the research results after completion

That year research will not stay on the shelves. The ideas will be disseminated even during the writing of the report. The following mentions are far from being exhaustive and simply give an idea of the type of dissemination that is envisaged: as broad, as efficient as possible.

The report will have a set of recommendations for international and regional organizations, local governments, and museums associations. These recommendations will be sent to each of these components and published, namely on social media.

The report will also address and disseminate recommendations to museums, based on the qualitative surveys with them. To do so, IRAPFM will propose series of webinars following the outstanding work done by *ICOM Define: Standing Committee for the Museum Definition* with webinars. IRAPFM will work with museums associations and local partners identified along these surveys, establishing think tanks and some global network.

IRAPFM will also have some recommendations for future research or actions. Along the year, some questions will appear of importance, arising from data, surveys, and not covered or lengthily discussed.

4. Bibliography supporting the research project (1 to 2 pages / 1000 words maximum)

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5. Description of the consortium (1 page / 500 words)

Abbreviations or this specific text:

"CS:" Members of the Consortium

"IE": International Experts

"They": Lead Partner, Members of the Consortium, International Experts

Overall description

It is essential for IRAPFM, that Members of the Consortium (CS) represent different continents, different parts of the world, to have with the Lead Partner an ongoing relationship throughout the whole year, for a better understanding of the geopolitical global worldwide situation and to present a broad variety of recommendations. These Members of the Consortium engage their university, their museum. Members of the Consortium include Canada (North America) as the Lead partner, Brazil (South America), New Zealand (Oceania), and Spain (Europe). They are joined by "International Researcher" (IR), who want to be closely involved but were not able to get the credentials of their institution due to time constraints: namely USA, South Africa, and India.

- CS as IR will act as consultants through the whole year.
- Both CS and IR will play an essential role in permitting IRAPFM to cover, as required, each major worldwide region so comparisons can be made in a much more complete and in-depth fashion.

Responsibilities of each researcher in the development of the project

- Questionnaires will be built and set up by the Lead Partner and discussed with CS/IR.
- CS will identify between 20 and 25 Museums, in his/her country/region, that will answer the questionnaire on public funding, on decrease if so of funding, and on new business models developed as a result.
- CS will help in assessing the received Museums' answers.
- CS and IR will also look at all the bibliographical research, complete it if required, and identify critical theoretical issues analyzed by international authors.
- CS and the Lead Partner with the help of IR, if necessary, will look at all Museums answers received, at all data compiled from official governments and museums associations determine practical issues that international community is facing.
- CS and IR will be part of a think tank with the Lead Partner that will meet every 4 to 6 weeks, at least for the second part of the year, by zoom.
- They will all work in the report' writing.
- They will arrive to a set of recommendations for measures to be implemented internationally or nationally or for future research.

- In doing so, CS and IR will keep in mind their role in developing the social impact of the research (see Social Impact) and will help in framing it more specifically.
- CS and IR will collaborate with the Lead Partner in developing tools to disseminate research results after completion (See Dissemination) and will help in the dissemination itself.

Executive Committee (Lead Partner) composition:

Pr. Yves Bergeron, Ph.D. Founder of the Chair on Museum Governance and Cultural Law (UQAM). Pr. Bergeron has lengthily published on Museum Studies and has namely an experience of more than 15 years with publications working with the *Observatoire de la Culture*, Quebec Statistic Institute. (SEE RESUME)

Pr. Lisa Baillargeon, Ph.D. Founding member of the Chair on Museum Governance and Cultural Law. Lisa Baillargeon is a tenure professor at the *École des Sciences de la gestion* (UQAM Business School) and has extensive experience in accounting, management, and governance.

Me Michèle Rivet., C.M., Ad.E. Scientific Director, Chair on Museum Governance and Cultural Law. In 2017, Me Rivet administered a survey of 23 countries to research how and why the 2007 ICOM museum definition is considered or not into their national legislation for ICOFOM.