

Learning Report

Study Visit Romania

2-4 October 2018



Overview of the Study Visit

The first study visit of Innocastle took place in Romania between 2 and 4 October. It was organised by the lead partner, the National Institute of Heritage and it encompassed a kick-off conference, a public debate, five site visits, a thematic seminar and a peer review. The complete programme can be found in appendix 1.

During **day 1**, a kick-off conference and a public debate were organised. During the kick-off conference, all partners presented the project and their regional situation. After the presentations, press and public were invited to address questions. The conference was followed by a public debate on theme of quality in conservation. The invited speakers were Emma Thompson (National Trust), Adrian Craciunescu (ICOMOS) and Eugen Vaida (MONUMENTUM Association) and the debate was moderated by Stefan Balici (National Institute of Heritage).

Day 2 explored various ownership and management structures of castle and manors. It included three of the site visits: Marghiloman manor in Hagiiești, Hagianoff manor in Manasia and Bellu manor in Urlați.

Day 3 of the study visit focused on the policy instrument addressed in Romania - the Regional Operational Programme 2014-2020, Investment priority 5.1 - “preservation, protection, promotion and development of the cultural heritage and identity”. As such the site visits included the UAR manor in Chiojdu and the Brâncoveanu Palace in Potlogi, two historical monuments that benefited from ROP. A thematic seminar was included in the day programme.

A more detailed review of the two days can be found on the Innocastle website at <https://www.interreurope.eu/innocastle/news/>.



Thematic seminar

The thematic seminar approached the themes of quality in restoration and public-private partnerships. Each partner with competencies in the topics held a presentation about the way these two topics are being incorporated in the public policies in their regions.

	Quality in restoration	Public-Private partnerships
University College Ghent (Belgium)	<p>Elaborate analysis - heritage in general In Flanders, heritage is being approached holistically. That includes a qualitative description and a research into the specific values of the place (historical, natural, esthetic, space-structuring values)</p> <p>This is done through inventories, ‘ankerplaces’, ‘heritage direction plans’, etc</p> <p>The decree of immovable heritage leaves room for project specific qualities. <i>"The belief in a participative process as a quality creating process is slowly growing."</i></p> <p>Participative processes include the interactions between the heritage agency and the owners of heritage through the help of mediating partners (such as the province), heritage management plans or on-site contact with heritage agents.</p> <p>The funding instrument includes quality evaluation. Besides, there are independent organisation that periodically evaluate quality, such as Monuments Watch, which is subsidised by the provincial government.</p>	<p>Management plan The "management plan" is an instrument created by the decree. It is a contract between the government, owner and stakeholders. Structural funding is made available in exchange for binding management terms for 20-24 years.</p> <p>The funding can include large renovation or small preservation costs. The percentage subsidised by the government is between 40% - 80%.</p> <p>If the heritage sites is open for the public, the owner can obtain higher subsidies (80%).</p>

<p>Province of Gelderland (The Netherlands)</p>	<p>Evaluating quality Quality evaluation is compulsory for all the projects financed by the Province of Gelderland. This applies to the restoration itself, but also to accessibility and sustainability.</p> <p>Companies that work on monuments also need to have a specific certification. This is given by independent organizations and it includes training of staff and periodic screening.</p> <p>Quality is evaluated jointly by the Province of Gelderland, Gelderland Restoration Centre ‘Monumentwatch’.</p> <p>Educating quality Quality is also fostered in the province by helping heritage owners be aware of the significance of their heritage, and also by showing good practice examples.</p> <p>This is done through: network meetings, practice days and consults at early stage on planning restoration individual advice by ‘Monumentwatch’</p>	<p>The Province of Gelderland does not usually participate in public-private partnerships.</p> <p>The province finances restoration of listed monuments, that can include gardens and parks, up to 60% of the costs; as least 40% of the costs must be charged by others. In most cases these are private partners.</p> <p>The province finances on the condition that the exploitation after the restoration will be sound.</p>
<p>National Trust (UK)</p>	<p>Conservation practice - constant development In order to achieve quality and ensure that the heritage objectives are still available in another 400 years time it is necessary to constantly develop the approach and technology. <i>“We work in partnership with Universities and Experts across the world to help increase our knowledge and promote better understanding of conservation principles and how old and new technologies can best work together.”</i></p>	<p>Different types of partnerships implemented in order to solve various problems</p> <ul style="list-style-type: none"> • Management Partnerships - when the heritage objective is not owned by NT or when parts of the HCMEs are owned by different people • Research partnerships - Oxford University, Birmingham University etc. - help train young professional and develop practices in the field of conservation and connex fields

	<p>Guiding principles for interventions</p> <ul style="list-style-type: none"> • Historical Knowledge of the building and how it has developed - done in depth, with medical precision, in order to understand every year from of the construction • Monitoring and evaluation • Understanding of the structure and its components • How it's going to be used and by whom • Needs for the future • Environment <p>The principles can be found at every level of intervention due to the fact that the intervention is the subject of a management plan.</p> <p>Community Including the community in the decision process is a constant practice that ensures the sustainability of reuse plans.</p>	<ul style="list-style-type: none"> • Supporting partnerships • Partnerships that support the local economy - <i>“Many of our properties are within rural communities and have come to the Trust as they are no longer viable financially in private ownership; by working in cooperation with tenants we have found ways to make agriculture viable”</i> - , the tourism, the tenants, the community • Corporate partnerships - <i>“ Partners that work with us to support our energy goals and communicate our conservation messages.”</i>
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Key Takeaways from the Site Visits

"I realised that none of the partners has a 100% perfect approach to heritage. That the basis for improvement lies with the broad recognition of the importance of heritage. That this is necessary in order to activate citizens, volunteers, professionals and especially politicians" - Paul Stein, Province of Gelderland.

Romania was the first study visit with the Innocastle project. It was also the first extensive interregional learning experience between all the partners. The partners formulated several ideas they will take back to their region following the study visit in Romania.

Partnerships

A theme that came up very often in the discussions was the crucial importance of partnerships. Building trust, positive communication, defining clear roles and setting up win-win partnerships were key elements.

- Public-Public partnerships - forming a heritage alliance between the various level of public governance. In Belgium, authorities have very clear roles: protecting the monuments (national), regional development (regional), issuing permits and innovating (local). Regional actors are essential in leading this partnership.
- Private-Private partnerships - one of the key success factors of good heritage projects is the involvement of various disciplines: architecture, history but also geography, landscape, community involvement, education, communication. Bringing these different points of view together is very important.
- Public-Private partnerships - stimulating better cooperation and frameworks for public-private partnership could help overcome issues related to **fragmentation** or **lack of capacity**. Monuments Watch is an example of good practice from Belgium and the Netherlands.

"(During the study visit in Romania, I realized that there are) similarities in challenges being felt across Europe - changes in use and demand, and how important partnership working (public and private) is to achieving sustainable future. (After this visit) I want to do more to support our local and regional government and also our neighbors. To have our aims and those of the local region come together." - Emma Thompson, National Trust

Communities

Growing community engagement, making heritage relevant for them and helping communities develop through their heritage.

"Transforming Historic Castles, Manors and Estates also means transforming the communities around them" - Chris Timmermans, Province of West-Flanders

Landscape-based approach

In Flanders, in order to find ways to better integrated heritage in regional development, heritage is being approached from a landscape and regional perspective. This approach was considered very interesting by all partners.

"This study visit has made me even more determined that Historic Castles, Manors and Estates should be seen as a holistic entity of a building with its surrounding. Only this way, we can make a true link between heritage and regional development." - Sylvie van Damme, University College Ghent

Making heritage attractive for a wider public

The need to keep heritage relevant and demonstrate its importance (economically, socially, environmentally and politically) was underlined. Attracting new public, reaching young people and working with schools are takeaways for all the partners. A good practice by National Trust is to combine heritage with other topics that reach wider audiences (entertainment, culture, debates).

Raising more awareness

The value of cultural heritage is not always recognized by all stakeholders or by the wider public. The need to raise more awareness and to communicate better with the public was underlined and partners realised they should do more in their own regions to achieve this.

In Romania, the National Institute of Heritage has recently started a campaign to mobilise instagrammers and vloggers to write and publish more about heritage and to attract young audiences. The need to work closer together with schools has come forward during the study visit.

Craftsmanship

The disappearance of skilled craftsmen is a European-wide problem and it can be sensed in each partner region. Casa cu Blazoane was an inspiring example for trying to revive the local craftsmanship and to make it popular again for young people. Working with youth and transforming castles and manors into schools for craftsmanship can provide good solutions for longer term.

Quality of restoration - site interpretation and research

Performing thorough research prior to any preservation or transformation work is essential in order to ensure that the site is interpreted correctly for its local context. Obtaining the right balance between quality of restoration and sustainable use is key.



UAR manor in Chiojdu



Brâncoveanu Palace in Potlogi

Analysis of the Regional Operational Programme 2014-2020

General information

- The Regional Operational Programme 2014-2020 (ROP 2014-2020) is a **funding instrument co-financed by the EU** through the European Regional Development Fund (ERDF) and by the Romanian government. The programme is designed and implemented based on the UE regulations concerning the ERDF and on the Romanian legislation
- The programme's **objectives and indicators were fixed during the programming process** realized by the Romanian authorities, are connected with the growth objectives of the EU, as they were defined through the strategy documents and were approved by the European Commission, having a binding effect for the Romanian authorities
- The Regional Operational Programme (ROP) **aims at promoting smart sustainable and inclusive growth** in all regions in Romania making them more attractive places in which to live and work. The programme addresses the major development challenges for Romania: regional competitiveness, sustainable urban development, the low-carbon economy, and economic and social infrastructure at regional and local level
- **Total budget for ROP:** 8.383.288.100,00 Euro, co-financed from FEDR with 6.860.000.000,00 Euro and from national budget with 1.524.288.100,00 Euro. The budget is divided, by central decision, between Romania's eight development regions at the beginning of a financial exercise.
- The investment priority **5.1 "Preservation, protection, promotion and development of the cultural heritage and identity"** is connected with the Priority Theme "Environment and resource efficiency" and with the Thematic Objective 6 "Preserving and protecting the environment and promoting resources efficiency" of the European Structural and Investment Fund.
- **Budget for PA5:** 435.122.890,00 Euro
- Projects contracted and financed under IP 5.1 in ROP 2014-2020 include projects selected under ROP 2014-2020 and unfinished projects from ROP 2007-2013. There are **Approx. 158** projects currently under implementation
- **7 HCME** are included in the programme in the 2014-2020 exercise
- **Reasons creating the Specific Objective 5.1** – Boosting local development through the conservation, protection and enhancement of local heritage and cultural identity : Cultural heritage sites are in an advanced state of decay, and they don't allow for optimal functions and for inclusion in the economy, thus leading to a degraded built environment, with negative impact on the residents' quality of life and on the development of the local economy. The limited availability of allotted funds destined for these sorts of interventions is made worse by faulty planning of construction works (construction yards and sites abandoned due to the interruption of financing, or to the absence of basic conservation and security measures etc.)

Obstacles to the application of ROP as defined by different stakeholders)

- Complicated eligibility criteria for private actors
- Incoherent interpretation of connex legislation
- Bureaucracy
- Lack of sustainability of business plans
- Lack of quality criteria for restoration works
- The public acquisitions law and public acquisitions system
- The scarcity of experienced construction firms and specialized craftsman

Recommendations for ROP

- Ensure the better involvement of multidisciplinary stakeholders in the design of the policy in order to get a better understanding of the complex restoration process
- Offer clearer procedures and ensure a better communication with potential beneficiaries
- Quality criteria for restoration projects and works to be included at project and costs eligibility. The quality of interpretation and management plans to be taken into account when selecting projects. Make sure that qualitative works are done and that management plans are available for the restored building, in order to ensure that sustainability of the investment
- Focus on the coherence of the functions to be implemented after restoration and on the sustainability of the business models and their correlation with the management plans. In the case of HCME, it seems impossible to maintain all as a museums. Before starting a restoration process, encourage beneficiaries to evaluate what function the building should take by market research, consultancy, feasibility study and creating a business plan that is in line with the regional aspects. The evaluation should take in account not just the HCME but the entire historical ensemble (country house with gardens, park, forest, arable fields etc), the zone and region it's set in
- Encouraged and incentivized partnerships through the policy instrument. This will lead to broader results and better impact at region level. *In the context of HCME - "Fragmentation of these places, happens everywhere. If we look at them as ensembles you have to promote cooperation between owners. What are interesting instruments to promote public private partnerships or private private partnerships and with local community?" - Elyze Smeets-Storms, stakeholder of the Province of Gelderland*
- Finance projects with different scales in order to address the complex situation of historic monuments in Romania. Complex, big scale restoration projects that address all the needs of the monument are important but small projects that can help the conservation of the monument are also worthwhile

SWOT for ROP (preliminary proposal)

Strengths

- Recognition of the economic importance of heritage (premise of ROP)
- The awareness-raising component for the general public (the mandatory publicity for the beneficiaries)
- The integration of cultural heritage into regional development
- Allocation of financial resources for heritage restoration

Weaknesses

- Treatment of heritage restoration similar to industrial investment, ignoring community-development aspects
- Lack of quality criteria specific to restoration initiatives
- Limited understanding of the potential spill-over effects of heritage restoration in social, educational and economic terms
- “Wrong education” of the public: learning about heritage and heritage restoration from cases of poor quality restoration projects
- Inflexibility of the project plans, which doesn’t fit the needs of restoration projects
- Addressing only monuments owned by not for profit legal persons

Threats

- Difficulties encountered by the Management Authorities in managing the programme and securing the funds
- Difficulties encountered by beneficiaries in implementing the projects, as it was shown by 2007-2013 exercise (unfinished projects)

Opportunities

- INNOCASTLE project – bringing good practices and learning experience

Recommended adjustments for the setup of ROP

- Preventing economic activities taking place at heritage sites and access are important issues to be addressed. **Heritage is a common good and needs recognition in order for citizens to understand and value it** - NT
- When talking about the conservation of built heritage Romania should raise the **multidisciplinary capacity; adopt appropriate funding schemas; enhance (pre)research; adopt project-type mechanisms and improve communication with stakeholders & community**. A lot would be achieved if funding of built heritage conservation would be stimulated and various funding mechanisms would be correlated.
- In order to achieve sustainable heritage conservation a **coordinated legislation** is essential. Also the entities that enforce the legislation should have efficient structures
- Create **better policy and strategy links** between cultural heritage, tourism and agriculture - *"Romania should focus a lot more on tourism in order to improve economic situation"* - Silvia Hernandez Muriel, Department of Tourism Regional Government of Extremadura.
- Conservation of Romanian built heritage should start with a thorough **inventorisation** on its status, ownership, intrinsic values and the state they are in. This will make possible to **prioritise the conservation** investments.

Stakeholder messages (from Participant Questionnaire)

A full report of the data obtained from the participant questionnaires can be found in appendix 2.

Stakeholder	What have you learned in Romania about heritage and local economic development issues that can be applied to the Action Plan for your region?	What ideas do you have for improving the PTE of HCME in Romania which they can use in their Action Plan?	What do you understand to be the main objective/s of Innocastle?
<p>Elyze Storms, Gelders Genootschap, The Netherlands</p>	<p>Interesting to hear British and Belgian cases and very comparable to Dutch cases. Romania has an unique place as many things are still in progress or very unsure.</p>	<p>Look at ensemble in its setting - spatial view - including parks, gardens, economic landscape. Need for landscape historians and spatial planners.</p>	<p>Looking at the role of governments to stimulate upkeeping/ maintaining/ developing castles, country houses and estates</p>
<p>Willem van Oorschot, Municipality of Voorst, The Netherlands</p>	<p>The circumstances in Romania and in the Netherlands differ very much. It did get more clear that cooperation, like we already do, is a very important aspect of successful help mansions to survive in a correct way.</p> <p>We have to cherish that and strive to improve what we have got going already.</p>	<p>To me it seems of extreme concern that knowledge of the importance of cultural heritage for tourism, economics, local identity, the story of local history is spread by population, politicians and other parties.</p> <p>Without basis there will not be sufficient support in money, regulation and a common wish for preservation of cultural heritage (and thus for mansions and castles). It is of utmost importance that in Romania organisations and different levels of government are stimulated to work together. Of course that has to be supported by public opinion and politics."</p>	<p>Preservation and use of mansions and castles, in way that is correct from the viewpoint of cultural heritage. How to organise this and translate to legislation.</p>

<p>Chris Timmermans, Province of West Flanders, Belgium</p>	<p>Importance of:</p> <ul style="list-style-type: none"> - coordinated legislation; -(multidisciplinary) capacity; - efficient structure; - appropriate funding; - (pre)research; - 2-phase evaluation/flexibility in project-approach; - adopt project-type mechanisms; - care for and communicate with stakeholders & community 	<ul style="list-style-type: none"> - Expand/structure the heritage team with related expertise/experts such as landscape, spatial planning. - Work towards acceptance by politicians/public servants at all levels in all related areas - Create awareness by civilians & local communities - Broaden the scope with context and landscape - Execute pilots to learn from and/or inspire - Communication oriented towards various types of public 	<p>Exchange knowledge and experience to influence heritage (& related) legislation and processes or structures, to the benefit of heritage HCME and the well-being of the community.</p>
<p>Dries Vanbelleghem, Province of West Flanders, Belgium</p>	<p>I have learned that it is possible to work with old crafts. This topic can be combined with local economics, education and also social-community based activities</p> <p>The study-trip convinced me even more that we should work with heritage in function of regional development rather than working on the aspect of conservation as such.</p>	<p>Combine heritage with the agenda of the place and create a holistic team to manage and influence local politics.</p>	<p>Learning how to implement heritage in a broader context as an option to influence policy.</p> <p>Starting with heritage but also working on a development and function aspect. Restoration follows the development story of the place.</p>
<p>Ioan-Luca Vlad, representative of the Romanian Royal Family, Romania</p>	<p>While I do not represent a regional authority, I have had the opportunity to see projects under various mixes of ownership (public / private), and understand the issues they confront in the</p>	<p>The Romanian partner should strive to obtain the eligibility of private owners to access the POR for financing. It has become clear that no alternatives exist to state / EU help (at least partially) with large restoration projects.</p>	<p>To promote the exchange of good practices in the field of castle and manor restoration, promotion and use.</p>

	actual restoration and running of the castles and manors. I was also able to obtain actionable ideas for managing the castles and mansions of the Romanian Royal Family.	Further ideas would be the creation of guides for the applicants, which should be cross- disciplinary (architecture, restoration, bureaucracy, tax, legal), to enable an applicant without human and organisational resources to make valid and successful applications.	
Mădălina Sonea , Ministry of Culture and National Identity – Department of Cultural Heritage, Romania	-	<ul style="list-style-type: none"> - raising awareness of the local people and of the local authorities through activities of promotion – concerts, artistic happenings, open doors for a larger public in certain days, activities for children - including these manors in a thematic cultural route (e.g. a wine route) and connecting them with touristic facilities in the area - finding a function which can attract different people interested - exhibitions etc - involve local authorities in order to make a priority of their revitalisation 	Innocastle aims to highlight a less known and valued heritage (at least in Romania) by raising awareness of its potential and improving policies that could help revitalise it, taking into account the specific problems that derives from its economical and legal status, and its state of conservation, very different from a case to another. Public policies should be more flexible in order to cover a wide range of problems.

Summary Table - good practices identified so far

Organisation in charge/ owner of the good practice	Practice	Geo scope	Short summary of the good practice (including URLs with further information)	Potential for learning or transfer	Evidence of success: What features make it an example of good practice
National Heritage Memorial Fund	Heritage Lottery Fund	UK	The National Lottery Heritage Fund is the largest dedicated funder of heritage in the UK. Since 1994, the National Lottery has raised more than £39bn for good causes. Of this, we have distributed £7.9bn to over 43,000 heritage projects. www.heritagefund.org.uk	In Romania, it could tackle the problem of lack of funds for co-financing/ preliminary studies.	To be further investigated in next study visits in UK.
Monuments Watch	Monuments Watch	NL/BE	Is an NGO that helps monument owners in maintaining their premises. In addition to assessing the state of maintenance, the monument keepers carry out small-scale repair and maintenance work and provide specific advice for the short and long term. https://mwnb.nl/?taal=en-GB	Could function as support for the Ministry of Culture in order to ensure the quality of projects and works	To be further investigated in next study visits in NL and BE.
Heritage Alliance	Advocacy	UK/NL	An NGO that unites over 100 independent heritage organisations in England as a powerful, effective and independent advocate for heritage. http://www.theheritagealliance.org.uk/	Helps NGOs have a common voice and a more important impact at national level.	To be further investigated in next study visits in UK.

Historic Houses		UK	Is an NGO that represent the nation's largest collection of independently owned historic houses and gardens. We are here to ensure these historic homes stay alive and accessible for generations to come. https://www.historichouses.org/	Encourage private owners to associate in a juridical form that would make them eligible for ROP.	To be further investigated in the study visit in the UK.
National Trust	Topophilia	UK	Interesting structural collaboration between the health and the cultural sector through innovative policies. https://www.nationaltrust.org.uk/stories/why-do-places-mean-so-much	Innovative way to bring more people to heritage.	To be further investigated in the study visit in the UK.
Monumentum	Ambulanța pentru monumente (Built Heritage Ambulance)	RO	Ambulanța pentru monumente is a pilot project through which specialists and experts in the field of heritage conservation identify built heritage objectives that need urgent interventions, make the intervention projects, raise the needed funding and with the help of volunteers carry out the safeguarding works http://ambulanta-pentru-monumente.ro/	Ambulanța pentru Monumente is implemented throughout the whole territory of Romania with the input of local organisation. This made the project stand out as it is organised as a franchise.	41 endangered heritage sites have been inventory through the project, in the Center development region. Money have been raised for 6 of them. 4 historic monuments have benefited from urgent works and 2 are in process.
ARA / Transylvania Trust / ARCHÉ Association	Summer schools dedicated to heritage conservation	RO	Built Heritage Conservation Training by Transilvania Trust http://www.heritagetraining-banffycastlele.org	The partners found interesting the idea of training young professionals by actually involving them in relevant actions for the	The Built Heritage Conservation Training has trained students, young professionals and craftsmen in specialised conservation works since 2001. So far

		<p>ARA Summer School / Adoptă o Casă la Roșia Montană - ARA These are two examples of programs that through their activity train young professional by actively involving them in restoration works on built heritage.</p> <p>https://www.adoptaocasa.ro/</p> <p>Summer school at the castle - ARCHÉ Association- is an interdisciplinary program that trains young professionals - by involving them in the first phase of the restoration project - the studies phase.</p>	<p>conservation of heritage objectives. The idea was first introduced by Transilvania Trust and won an Europa Nostra Prize in 2008.</p>	<p>approximately 2500 participants from around 26 countries (Romania, Albania, Australia, Brazil, Belgium, France, Hungary, Poland, Slovenia, Sweden, United Kingdom, United States, etc.) have participated in the international training courses. Through this programme the Bonțida Castle has been partially restored.</p> <p>ARA Summer School / Adoptă o Casă la Roșia Montană (2012) are initiatives that aim to raise awareness and help conserve the built heritage of Roșia Montană by raising money and connecting owners with NGOs and volunteers. 10 buildings are inscribed in the program and two of them have been already restored. Around 300 volunteers have been trained through the program.</p>
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					<p>Summer school at the castle - ARCHÉ Association (2016) The aim is to encourage teamwork, enhance negotiation skills and raise awareness on the specificities of the different specializations needed for a sustainable conservation and valorization of built heritage. Through the program more than half of the studies needed for the restoration project of the Teleki Castle in Gornești have been done. Around 100 students and young professionals were involved.</p>
National Institute of Heritage and Zaga Brand	Cronicari digitali (Digital chroniclers)	RO	<p>Is a project initiated by a PR company, that aims to promote cultural heritage by inviting bloggers and vloggers to post their personal interpretation of the monument's story. The bloggers and vloggers are introduced to the monuments through cultural tours organised with the input of the National Institute for Heritage.</p> <p>http://cronicaridigitali.ro</p>	An interesting idea that aims to connect the X, Y și Z generation through knowledge transfer and engage young people in promoting the cultural identity through storytelling and social media.	Through the project launched in 2018, 52 historic monuments have been visited and 3650 pictures have been taken and posted online in order to make the heritage objectives visited go viral.

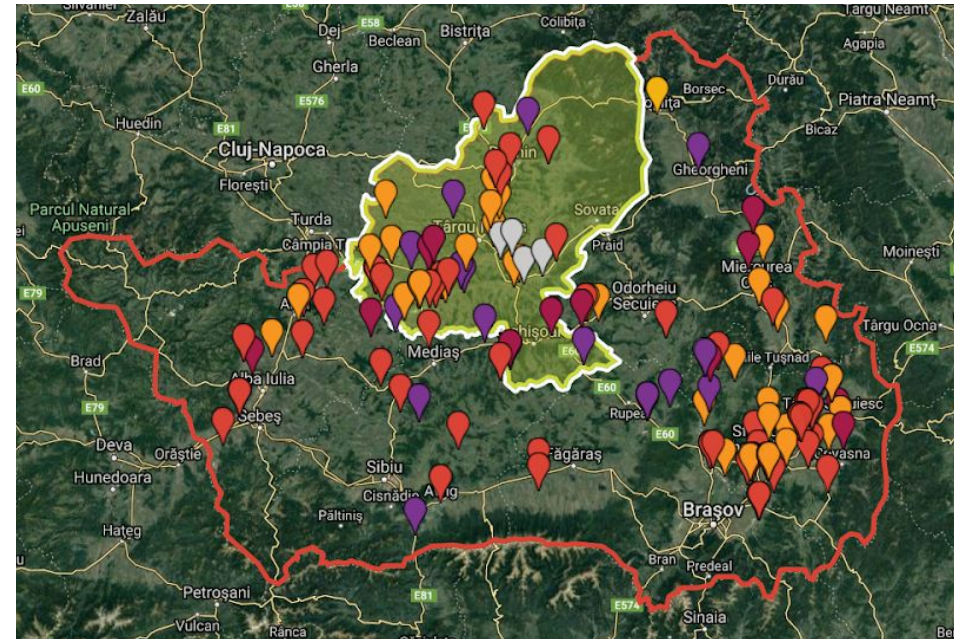
Thoughts on learning cases

When choosing the learning cases the National Institute of Heritage will consider the following aspects:

- The heritage objectives relevance for ROP
- Their relevance for regional tourism development
- The diversity of situations, as the study is as much as possible relevant at national level
- The existing connection with the owners/administrators
- The information available for the region where the learning cases are located

The learning cases should provide input on the topics pointed out through the study visit:

- Cultural heritage legislation
- Tourism and agricultural strategies
- Improving the context and approach of restoration projects - raise (multidisciplinary) capacity, adopt appropriate funding schemas, enhance (pre)research; adopt project-type mechanisms and improve communication with stakeholders & community
- Landscape approach of HCME
- Partnership for integrated development strategies
- Use of HCME, the connection with the local and regional socio-economic factors and business development in order to achieve sustainability
- Multilevel approach - governmental/institutional, civil society, private/administrative



HCMEs in the Center Development Region and Mureș county

In this context the NIH team proposes Center Development Region as area to be studied. General information like social, economic and environmental facts will be gathered at national and regional level. The study of HCMEs will be focused on one of the counties. Specific information will be gathered for each castle and manor in the selected county in order to generate the connection between the heritage objective its landscape and the socio-economic context. The proposed county is Mureș as it encompasses a large amount of HCMEs that present a variety of characteristics, meaningful for this particular architectural typology at national level.

Comments on the organisation of the study visit:

Balance of site visits and discussion, choice and number of sites, logistical issues, ideas for next study visits (from Peer Review)

Some of the participants considered the study visit too intense. For next visits, the recommendation was to reduce the number of activities and allow more time for discussions between partners. A suggestion from partners was to add a short talk/debate of 30 minutes for each site relating to the site's problems and opportunities.

A general remark was that the explanations received at some of the sites were not related to the process enough. Some of the local guides had extensive explanations about the history of the sites themselves which were not so relevant for the overall project.

Participants also suggested that next study visits should have more active sessions (workshops), also focus on green heritage and that partners should try and work together with various country house owners. Peer-to-peer sessions for next visits.

Future Actions for Innocastle

After the study visit in Romania, the partners of Innocastle will proceed to finalize the methodology for the baseline study and to start the analysis in each region. The next study visits will take place on **27-31 May 2019 in the United Kingdom** and on **25-28 June 2019 in the Netherlands**. The study visit in Spain will take place in the autumn of 2019.

Locally, each partner will proceed to organise their first official stakeholder meeting in the spring of 2019. The aim of the first stakeholder meeting will be to introduce the project, to involve and create support amongst stakeholders, to increase their interest in the project and ensure their collaboration. A decision about the learning cases to be selected in each region will be made during the stakeholder meeting. Stakeholders will be introduced with the process to define an action plan for each local policy instrument.

Appendixes

Appendix 1 - Programme, Appendix 2 - Analysis of Participant Questionnaires



INNOCASTLE Consortium at Bellu Manor in Urlați

Innocastle

Interreg Europe

INNOvating policy instruments for preservation,
transformation and exploitation of heritage
CASTLES, manors and estates



Romania

1 - 4 October 2018



European Union
European Regional
Development Fund



Institutul
Național al
Patrimoniului
Ministerul Culturii și
Identității Naționale

HoGent



provincie
Gelderland



National
Trust



Căciulați - ARCHÉ Association Archive, 2016 (Raluca Zaharia)

Overall programme

1 - 4 October 2018

MONDAY, 1 OCTOBER

Location: Caru' cu Bere, Stavropoleos Street 5, Bucharest

20:00 - 22:00 Welcome dinner

TUESDAY, 2 OCTOBER

Location: Hanu' lui Manuc, Franceză Street 62-64, Bucharest

09:00 - 12:00 Partner meeting

12:00 - 13:30 Kick-off conference Innocastle

13:30 - 15:00 Lunch and networking

15:00 - 19:00 Quality in conservation - public debate

19:00 - 21:00 Dinner

WEDNESDAY, 3 OCTOBER

Meeting point: George Enescu Square, in front of the Romanian Athenaeum, in the parking lot, 08:00

08:00 - 19:00 Study visit - day 1

THURSDAY, 4 OCTOBER

Arrival in Bucharest: Romanian Atheneum, 21:30

09:00 - 21:30 Study visit - day 2



Institutul
Național al
Patrimoniului

Ministerul Culturii și
Identității Naționale

Kick off conference

2 October 2018

- 12:00 - 12:10** Welcome participants
- 12:10 - 12:15** Opening
Irina Iamandescu, National Institute for Heritage
- 12:15 - 12:25** Presentation of the objectives of the
National Heritage Institute (Romania)
Raluca Bărbulescu
- 12:25 - 12:35** Presentation of the objectives of
University College Ghent (Belgium)
Bert de Roo
- 12:35 - 12:45** Presentation of the objectives of the
Regional Government of Extremadura (Spain)
Silvia Hernandez Muriel
- 12:45 - 12:55** Presentation of the objectives of the
Province of Gelderland (The Netherlands)
Paul Thissen
- 12:55 - 13:05** Presentation of the objectives of the
National Trust (United Kingdom)
Catherine Leonard
- 13:05 - 13:30** Press / public questions
-
- 13:30 - 15:00** Lunch and networking
-



Quality in restoration - debate

2 October 2018

- 14:45 - 15:00** Registration of participants
- 15:00 - 15:20** Introduction
Quality of restoration works. Determining factors. (RO)
Ștefan Bâlici, director of the National Institute of Heritage
- 15:20 - 15:40** *Quality in conservation (EN)*
Emma Thompson, National Trust
- 15:40 - 16:00** *Quality-authenticity relation, in restoration (RO)*
Adrain Crăciunescu, ICOMOS
- 16:00 - 16:20** *Practical experience and quality in restoration (RO)*
Eugen Vaida, MONUMENTO Association
-
- 16:20 - 16:30** Coffee break
-
- 16:30 - 18:30** Debate, moderated by Ștefan Bâlici (RO)
-
- 18:30 - 19:00** Vin d'honneur
19:00 - 21:00 Dinner
-



Institutul
Național al
Patrimoniului

Ministerul Culturii și
Identității Naționale

Study visit - day 1

3 October 2018

- 08:00 - 09:30** Travel București - Hagiești
Pick up: Piața George Enescu (Ateneul Român), 8:00
- 09:30 - 11:00** Local tour of the **Marghiloman manor in Hagiești**
Guided by The National Institute of Heritage
- 11:00 - 12:00** Travel Hagiești - Manasia
- 12:00 - 13:30** Local tour of the **Hagianoff manor in Manasia**
-
- 13:30 - 14:30** Lunch
-
- 14:30 - 15:30** Travel Manasia - Urlați
- 15:30 - 17:00** Local tour of the **Bellu manor in Urlați**
- 17:00 - 18:00** Travel Urlați - Vălenii de Munte
- 18:00 - 19:00** Discussions - first impressions day 1
- 19:00 - 20:00** Check in Hotel Afrodita
-
- 20:00 - 21:00** Dinner
-



Study visit - day 2

4 October 2018

- 09:00 - 10:00** Travel Vălenii de Munte - Chiojdu
- 09:30 - 11:00** Local tour of **Casa cu Blazoane / House with Coat of Arms in Chiojdu**
- 11:00 - 13:00** Thematic Seminar
Theme 1: **Public private partnerships**
Theme 2: **Quality in restoration**
Moderator: Ștefan Bâlici
-
- 13:00 - 14:00** Lunch
-
- 14:00 - 16:30** Travel Chiojdu - Potlogi
- 16:30 - 17:30** Local tour of the **Brâncoveanu Palace in Potlogi**
- 17:30 - 19:30** Peer review
-
- 19:30 - 20:30** Dinner
-
- 20:30 - 21:30** Travel Potlogi - București



Thematic seminar

Date: 4 October 2018, 11:00 - 13:00

Location: Casa cu Blazoane / House with Coat of Arms, Chiojdu

Moderator: Ștefan Bâlici

11:00 - 11:05 Introduction - Ștefan Bâlici (National Institute of Heritage)

11:05 - 11:20 **Introduction of participants**

11:20 - 11:40 Presentation **POR 5.1**

11:40 - 12:20 Presentations **Innocastle partners**

12:20 - 12:40 Discussion on the basis of
POR 5.1 and Casa cu Blazoane / House with Coat of Arms

12:40 - 12:50 Q & A

12:50 - 13:00 **Conclusions**

Peer review

Date: 4 October 2018, 17:30 - 19:30

Location: Brâncoveanu Palace, Potlogi

Moderator: Catherine Leonard

17:30 - 17:35 Introduction - Catherine Leonard (National Trust)

17:35 - 18:45 **Talanoa dialogue.** Points of discussion:
- takeaways study visit
- POR 5.1 - suggestions and comments
- comments on the organisation of the study visit

18:45 - 19:00 Conclusions

19:00 - 19:30 Learning survey / questionnaire



Marghiloman manor, Hagiștei

1. Name of the property, location:

Marghiloman manor, Hagiștei village, Sinești commune, Ialomița county (located about 35 km from Bucharest, the capital of Romania).

2. Surface of the property (including garden and annexes):

A nearly square (40.5m x 50 m) land of 2025 sqm, located around the manor, and a land of 3.983 sqm, joining the first on the southeast sides.

3. Number of buildings, size, age and conservation state. Recent conservation works and condition.

The present property is composed only by the manor. This had different construction stages, going back until the 17th century. In general the volume of the mansion is generated by a rectangular prism, in square shape, with a side length of about 18.5 m. The most significant conservation work was in 1990s when, after a period of decades of degradation, extensive consolidation and refunctioning interventions have taken place.

4. Significance of the property (historic, architectural, cultural, social, political, economic)

The history of the Marghiloman estate and manor in Hagiștei spans for several centuries, these being mentioned for the first time in the documents issued at the end of the 16th century and the beginning of the 17th century. The domain has, over time, been owned by several families belonging to the social elites in Romania, such as Dudescu, Suțu or Anastasievici. In 1880, it was bought by Ioan Marghiloman.

There are no documents that make firm stating about the moment of the manor's construction and about the changes made before the end of the 19th century, but after the architectural research and analogues with similar examples built in the same time, four major constructive stages that have generated the shape of the current construction can be identified. The first one is the cellar, which in all likelihood was built by the representatives of the Dudescu family in the first half of the 17th century. A second significant construction stage seems to correspond to the 18th century when several rooms were added to the eastern and southern sides of the old building, the vaults with penetrations being an argument in the formulation of this hypothesis. The third stage is related to the name of Ioan Marghiloman, who, between 1880 and 1887, made extensive work on the transformation of the mansion. The manor is bunked and a generous terrace facing the Mostiștei valley is added. At the same time, the facades



are completely rebuilt, the principles of the academic current being chosen for the outer plastics. A final stage is in the early 1990s when, after a period of decades of degradation, extensive consolidation and refunctioning interventions have taken place on the manor, but not completed.

Nowadays the manor is a historical monument of national and international significance (group A listed monument).

5. **Current use. Historical uses.**

The estate has no current use. Historically, it was built for residential purposes and functioned as such until it was nationalized in 1945, since then being used by various state institutions. In the 1946s the estate was used by the General Confederation of Labor in Romania that wanted, at least on a declarative level, to organize a farm. Later, the area of 25.5 ha was used by the Fisheries Directorate, and the gendarme station, the home of the chief of staff and the notary of the commune had been installed in the mansion. After a few years the land and the manor became the headquarters of the Agricultural Production Cooperative and functioned as a school for tractors. In 1990, the Hagiștei manor was in the use of Romanian National Library, but by the end of the same year the property was transferred to the Department of Historical Monuments, Assemblies and Sites (DMASI), now known as the National Institute of Heritage.

6. **Ownership** (private, public, non-profit) and management structure.

At present, the manor is owned by the Ministry of Culture through the National Institute of Heritage.

7. **Main challenges to its management**

8. **Legal status of the property** (including the garden)

State property.

9. **Role of the property in the local economy** (Where does its income come from: tourism, agriculture, grants, catering? Does it have a cross sectoral revenue model? Is the property self-sustainable: cost vs income? How many people does it employ full time?)

Given the lack of a present function, the manor does not currently have any role in the local economy.

10. **Experiences with the Regional Operational Programme.** Investment priority 5.1 - Conservation, protection, promotion and development of natural and cultural heritage.

No experiences.





The Hagianoff manor, Manasia

1. Name of the property, location:

The Hagianoff manor, Manasia commune, Ialomița county.

2. Surface of the property (including garden and annexes):

Manor and garden - 2 ha.

3. Number of buildings, size, age and conservation state. Recent conservation works and condition.

Manor and garden, in good condition, recently restored. In 2006 the estate was bought by Ariadna Löwendal Danila, who sensed its economic, historical and architectural potential. At the time, the mansion was still functional, inside traces of frescoes still visible. In a first phase that lasted four years, the mansion and the park have been restored. The investment cost 2.5 mil. Euros and was made largely with private funds. European funds have been accessed only for purchases of equipment and facilities.

4. Significance of the property (historic, architectural, cultural, social, political, economic)

Historical monument of national and international significance (group A listed monument). The history of the manor began in 1650 when the estate first appeared mentioned in documents as property of the Cantacuzino family. The peak of the estate started in 1839 after it was purchased by Prince Ephraim Obrenovic. He built the house, the town hall and the church, and gave the village its current form. After 1879, his descendants sold the estate to Ion Hagianoff, former foreign minister of Bulgaria, which gave the manor its current form.

5. Current use. Historical uses.

The estate is currently used as an events centre. Historically, it was built for residential purposes and functioned as such until 1944. After that it was used as a command centre of the Soviet troops and, after nationalization, as a I.A.S. (State Agricultural Enterprise) headquarters and kindergarten.

6. Ownership (private, public, non-profit) and management structure.

Private ownership.

7. Main challenges to its management

8. Legal status of the property (including the garden)

Private property.

9. Role of the property in the local economy (Where does its income come from: tourism, agriculture, grants, catering? Does it have a cross sectoral revenue model? Is the property self-sustainable: cost vs income? How many people does it employ full time?)

Currently the core business is the organization of private events, fairs and exhibitions. Also Saturdays and Sundays, guided tours take place on the estate, where the history, architecture, and the entire process of restoration are being presented to the visitors.

10. Experiences with the Regional Operational Programme. Investment priority 5.1 - Conservation, protection, promotion and development of natural and cultural heritage.



Bellu manor, Urlați

1. Name of the property, location:

Bellu manor, Urlați city, Prahova county.

2. Surface of the property (including garden and annexes):

3. Number of buildings, size, age and conservation state. Recent conservation works and condition.

Today, the small manor, the gate building and the garden are in good condition. The big manor was destroyed in the 1940 earthquake. Conservation works took place in 1994, 1995 and 1997. Extensive restoration process was financed by the County Council of Prahova in 2004.

4. Significance of the property (historic, architectural, cultural, social, political, economic)

Historical monument of national and international significance (group A listed monument).

5. Current use. Historical uses.

The estate is used as a museum. Historically, it was built for residential purposes at the end of the 19th century by Alexandru Bellu baron, and functioned as such. The small manor used to be the guest house. In 1926, the whole domain was donated by the Bellu family to the Romanian Academy and later it was nationalized. In 1953, the domain became an Ethnographic Museum. From 1990 and up until recently, the domain was in the possession of the Local Museum of

History and Archaeology Prahova. It was reclaimed by the Romanian Academy, but still remains under the administration of the Local Museum.

6. Ownership (private, public, non-profit) and management structure.

Private ownership, public management. It has been won back by the Romanian Academy after several trials with the County Council. It is a private research institute (under the Romanian Academy) managed by the Prahova County Museum of History and Archaeology, public institution financed by the Prahova County Council.

7. Main challenges to its management

8. Legal status of the property (including the garden)

Private property.

9. Role of the property in the local economy (Where does its income come from: tourism, agriculture, grants, catering? Does it have a cross sectoral revenue model? Is the property self-sustainable: cost vs income? How many people does it employ full time?)

The Museum is financed by the Prahova County Council and from extra budgetary income.

10. Experiences with the Regional Operational Programme. Investment priority 5.1 - Conservation, protection, promotion and development of natural and cultural heritage.



Casa cu blazoane / House with Coat of Arms, Chiojdu

1. Name of the property, location:

Casa cu blazoane / House with Coat of Arms, Chiojdu village, Buzău county.

2. Surface of the property (including garden and annexes):

3121 sqm in property and 1503 sqm land under the administration of Union of Romanian Architects (UAR).

3. Number of buildings, size, age and conservation state. Recent conservation works and condition.

The property has 2 buildings - the historical monument built around 1700 and the information point built between 2012 and 2015. The old house has been restored between 2012 and 2015 as part of an EU funded project.

4. Significance of the property (historic, architectural, cultural, social, political, economic)

The House with Coats of Arms was re-inscribed as a group A (national) monument through the efforts of UAR - it used to be a B group (local) monument.

It is considered to be a representative example of how the historical medieval elites built their country estates (mixing Oriental and Western influences or religious and laic symbols).

Today it is the landmark of the village (and one of the landmarks of the region).

5. Current use. Historical uses.

Allegedly erected around 1680-1700 by Mihai Cantacuzino (high ranking boyar), the House was built for residential purposes and was used as such throughout centuries. After 1800, it was inhabited by another boyar family until 1948. Later, it was sold to a local, Marcel Codescu, after which it was bought and inhabited



by Cabel Liviu until 2003. After that, it belonged to Florin Drăgulin, who sold it to the Union of Romanian Architects.

Today it is used as a centre for culture and creation. It also houses activities such as: workshops for children, presentations and workgroups from different domains, concerts, thematic seminars, brunches, fairs for local traditional products, wedding photo shoots etc.

6. Ownership (private, public, non-profit) and management structure.

Private property belonging to the UAR, as an independent structure under its patronage.

7. Main challenges to its management

The aim is to integrate the property in the local socio-economic environment, involving the local authorities and raising the awareness of the locals, highlighting the importance and value of culture for the local economic growth.

8. Legal status of the property (including the garden)

Private property of UAR.

9. Role of the property in the local economy (Where does its income come from: tourism, agriculture, grants, catering? Does it have a cross sectoral revenue model? Is the property self-sustainable: cost vs income? How many people does it employ full time?)

The property has 5 employees, including its administrator, and has support from the main headquarters of UAR. It is not yet self sustainable and needs financial support from the institution, especially when it comes to staff costs.

Its influence on the local environment and economy is benefic and growing, but it has not yet been quantified.

The ensemble has around 2500 visitors annually, mostly tourists. The number is rising.

10. Experiences with the Regional Operational Programme. Investment priority 5.1 - Conservation, protection, promotion and development of natural and cultural heritage.

The restoration was financed through the Regional Operational Programme. In 2016, two years after finishing the investment, UAR was invited to present the project at a Regio communicators conference and it was presented as a successful project and also a best practice example. Communication with the county monitoring structures is still developing.





Brâncoveanu Palace, Potlogi

1. Name of the property, location:

Brâncoveanu Palace, Potlogi commune, Dâmbovița county (located about 55 km from Bucharest, the capital of Romania).

2. Surface of the property (including garden and annexes):

23.000 sqm.

3. Number of buildings, size, age and conservation state. Recent conservation works and condition.

The ensemble consists of several components, the most important being: the Brâncoveanu Palace, the old house, the old servant houses, the main door tower, the old kitchen and the "Saint Dumitru" Church. The ensemble from Potlogi was built in the 17th century and the most recent conservation work began in 2011 and lasted more than four years.

4. Significance of the property (historic, architectural, cultural, social, political, economic)

The history of the Brâncoveanu Palace in Potlogi spans for several centuries. The ensemble was built in the last decade of the 17th century by the Wallachian ruler, Constantin Brâncoveanu. The palace was destroyed by an Ottoman army, only fifteen years after its construction, in 1714. After this time, it was not rebuilt, being left in ruins for the next two hundred and fifty years. The reconstruction of the Potlogi palace began in 1955, during the communist regime, closely following the "Brâncovenesc" models developed during the restoration of Mogoșoia Palace, another important building of that period, restored after 1920 by the great Romanian architect George Matei Cantacuzino.

Nowadays the manor is a historical monument of national and international significance (group A listed monument).

5. Current use. Historical uses.

After the recent restoration works, the ensemble has been refunctionalized into a cultural center. Historically, it was built as a princely house for Constantin Brâncoveanu, ruler of Wallachia.

6. Ownership (private, public, non-profit) and management structure.

At present, the manor is owned by the Dâmbovița County Council through the "Royal Court" National Museum Complex, Târgoviște.

7. Main challenges to its management

8. Legal status of the property (including the garden)

State property.

9. Role of the property in the local economy (Where does its income come from: tourism, agriculture, grants, catering? Does it have a cross sectoral revenue model? Is the property self-sustainable: cost vs income? How many people does it employ full time?)

10. Experiences with the Regional Operational Programme. Investment priority 5.1 - Conservation, protection, promotion and development of natural and cultural heritage.

The ensemble was restored through the Regional Operational Programme - investment priority 5.1.

Notes

Notes



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INNOCASTLE

Romania Visit (October 2-5, 2018)

Analysis of Participant Questionnaires

Two sets of questionnaires were completed by eighteen participants to the Romania meeting: a pre-study visit and post-visit questionnaire. These were filled out on-line by 4 Romanian, 4 Flemish, Belgian, 2 Spanish, 3 UK, and 3 Netherlands Innocastle members, and 2 from Eurodite. Key findings are summarized below. It should be kept in mind that quantitative scores are subjective and provided by the respondents. Qualitative comments are therefore important indicators for the performance of the project. Ten out of the eighteen participants (55.5 percent) did not have any professional contact with Romanian heritage experts prior to the visit; therefore the visit broadened professional networks for all involved.

Pre-Visit Expectations

Numerous participants mentioned their hope to exchange ideas, gain insights, and be inspired by the Romania field visit. They were ready to exchange ideas and good practices with other partners and put them into practice in their region. They also wanted to learn about the management of heritage in Romania, including financial aspects and the possibilities for owners to develop their properties. As this was the first full partner meeting, participants looked forward to meeting one another and seeing how the project theory plays out in practice, how the local stakeholders view the project, how the team works together, and how the study visits contribute to the project.

Key Takeaways from the Romania Study Visit

At the European level, participants commented on the value of looking at different approaches to heritage in the Innocastle partner countries.

Understanding of Romania increased substantially as a result of the visit. Participants commented on the energy and enthusiasm of the National Institute of Patrimony in the face of sub-optimal legal and institutional structures.

Among the recommendations were that the National Institute of Patrimony could become a “focal point for the cooperation between private owners and public authorities for the development of local HCME strategies...” Another idea was that public and private owners would benefit from coaching to improve HCME projects. Forming a “heritage alliance” as in the UK or Gelderlands was cited as a way to keep heritage on the agenda and try different tactics.

In regard to the function of HCMEs, respondents noted that they needed new functions aside from serving as museums. They could be “centres of local remembrance” and also an element to transform communities. A cross-cutting theme was the role of HCMEs in regional economies. Heritage experts were urged to “*think about business cases and economic models.*” In the view of one participants, “The study trip convinced me even more that we should work with heritage in function of regional development rather than working on the aspect of conservation as such.”

Comments also revealed a gap between the concerns of tourism officials and those responsible for heritage and the importance of craftspeople and craftsmanship in successful heritage interventions. The need for a multi-professional approach to HCMEs was stressed.

Of particular importance in the context of Romania was the need to improve *trust* between owners and government.

Some Learning Results

Learning from the visit was multi-faceted: learning about Romania and its situation; learning from the policy and practices employed in Innocastle countries; and more personal learning related to professional matters such as developing networks and focusing on interagency and community cooperation.

Overall participants registered an increased familiarity with Romania's ROP: prior to the visits the average score was 1.88 and afterwards was 2.22.

What is your level of familiarity with Romania's Regional Operation Program 2014-, Investment Priority 5.1 Preservation, protection, promotion and development of the cultural heritage and identity?

Average score Pre visit 1.88

Average score Post visit 2.22

Level of understanding of transforming HCME to new uses – in general – averaged 2.55. When the question was asked for Romania the average score was also 2.55.

Concerning familiarity with heritage laws and policies in Romania, before the visit, 12 out of 18 respondents were not, while 6 were familiar (mainly Romanians).

In answer to the question, "What is your current knowledge of coordinating the preservation, transformation, and exploitation (PTE) of HCME with other regional development strategies (such as transport, education, tourism, environment) in Romania?" the average familiarity was 2.55

When asked "How has your visit to Romania developed your professional expertise and experience of the (PTE) of HCME and how heritage can stimulate the economy?", it was evident that the visit provoked productive thinking spurred by "actionable intelligence" provided by the group. Among the comments were:

- Discovering different approaches towards HCMEs in the different countries helps to find ways to adapt solutions to different national, regional and local needs
- Best practice examples were inspiring, for example the National Trust's model of engaging with local communities (farmers, markets, school visits, museum collections etc.)
- Legal frameworks would benefit from refinement
- Quality of conservation requires attention and evaluation mechanisms and debate on future function is essential before implementing a project
- The political and institutional context affects the (non) effectiveness of heritage interventions while partnerships are a way to increase impact
- For those working in the tourism sector, heritage can be used to promote visits
- Strategies that link sites and develop itineraries may be more effective in stimulating the local economy than focusing on single sites
- Heritage projects, when well designed, can "provide more jobs for the community, create more visibility for the region with consequences in tourism and other attractions that can be developed."

Suggestions for improving the Preservation, Transformation, and Exploitation (PTE) of HCMEs in Romania

There were many useful ideas expressed in response to the question, “What ideas do you have for improving the PTE of HCME in Romania which they can use in their Action Plan?” First and foremost was the suggestion that private owners should be eligible for funding; the creation of a guide for applicants would help them in the application process. Incentives to encourage partnerships between the private and public sector were advised. Another suggestion was to expand the structure of heritage teams with related expertise such as landscape design and history, spatial planning etc. Looking at heritage assets in their setting, including parks, gardens and productive landscapes, was seen as needing more attention. The concept of place-based regeneration was articulated. Awareness raising was a central theme: at the political, governmental, local community and citizen levels. Various types of promotion and communication were cited: concerts, heritage open days, activities for children, itineraries. The tourism exploitation of HCMEs was also pointed out as a way to raise income; others preferred more freedom to commercialize heritage assets. Concern was expressed about introducing quality measures into the Regional Operational Programme (ROP), perhaps by the Dutch/Flemish mechanism of a ‘Heritage Agent’ or the HLF multi-staged approach. Respondents pointed to the role of the EU in advocating for quality. Regular condition inspections were seen as a way to help maintain properties and avoid a negative cycle of restoration.

Action Plans

The visit gave an opportunity to think ahead to the formulation of Action Plans. In response to the question, “What have you learned in Romania about heritage and local economic development issues that can be applied to the Action Plan for your region?,” respondents referred to issues regarding” the different ownership statuses, the funding eligibility, the regional and local urban plans, the position of the heritage site in the territory etc.” Others cited the role of regional networks and the regional development opportunities for HCME investment. The need to develop business cases and economic models was also stressed. The theme of coordinated legislation and institutional structures was repeated as was the importance of quality of conservation work and continuance of traditional building crafts. Trust between owners and government was seen as a pillar for programmes. Lastly responding to changing societal needs was critical for HCMEs to maintain their relevance.

More on Learning

Overall the questionnaires showed the participants’ interest in informing themselves about Romania and modest learning, especially in regard to familiarity with aspects of the Romania situation. They also confirmed that the visits and discussions were a help in thinking about quality in conservation, stakeholder consultations, assessing data needs, preparing country visits, and preparing Action Plans.

Suggested Changes to the Questionnaires

For future country visits, there is no need to ask questions about participants’ professional backgrounds or Innocastle’s aims. For ease of analysis for any question with numerical responses, it would be helpful to have the pre- and post- visit questionnaires aligned as much as possible. The questionnaires have provided quite a lot of insights for the project as well as for “actionable ideas” for the institutions and individuals involved. In general participants seemed to understand the reason for the questionnaires and made an effort to express their opinions with honesty.