

Summary of the good practice examples collected by way of surveys with cultural institutions

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inputs by all project partners

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1. Introduction

This document presents a summary of the exercise performed by PPs in surveying different cultural institutions as to collect examples of good practices in cultural heritage sustainability and durability. The exercise has been done following the clear instructions provided by the Institute for Development and International Relations (IRMO - PP07), in charge for the exchange of experiences project. First, partner institutions were provided with the list of possible questions to be discussed with cultural heritage managers as to detect if the analysed practice complies with the previously set criteria of sustainability. Also, they were provided the good practice template (Annex to this document) previously agreed on, which served as the document to be filled in after the performed interviews. The criteria, which served the analysis were divided in three main groups: sustainability, cultural values and transferability. These were further sub-divided as follows:

CRITERION 1 Sustainability

- a) Impact on safeguarding of cultural heritage*
- b) Economic viability*
- c) Environmental impact*
- d) Social impact*

CRITERION 2 Cultural values

- a) Scientific*
- b) Aesthetic*
- c) Cultural/historic*
- d) Landscape*
- e) Uniqueness*
- f) Educational*
- g) Local community*
- h) Economic*

CRITERION 3 Transferability

- a) Organisational model*

- b) *Policy making process*
- c) *Specific tools (e.g. training, financing, management)*
- d) *Risk management*

2. Explanation of the criteria

Surveys with cultural institutions were based on the criteria previously accorded among the project partners. Sustainability and durability of cultural heritage generally can be seen in the social, cultural, economic and environmental sense. Ensuring its sustainability and durability is not a simple task and should be viewed in a holistic sense. Sometimes, cultural heritage assets may be sustainable e.g. in its economic sense, however at the same time failing to ensure heritage cultural values or having no meaning to the local community which should normally be its direct beneficiary. Therefore, when discussing sustainability, it is of the utmost importance to view it holistically since ensuring only one aspect of cultural heritage sustainability may be detrimental for its another aspect.

The partnership has agreed to collect examples both of tangible and intangible heritage due to their importance for the local/regional development. It is often the case that only their combination ensures best results in the developmental sense and provides much sounder grounds for the preservation of heritage itself.

It has been expected, though, that not all the examples would be successful in proving sustainability/durability by all set criteria. The collection exercise, however, proves to be successful as a training exercise for the partnership itself but also for the exchange of the experiences and learning from examples of the others.

Therefore, the first set of criteria is more general and relies on the already mentioned cultural, economic, environmental and social impact of heritage. When it comes to cultural sustainability, the criteria focused on conservation activities applied under the highest standards while overcoming the challenges. Economic viability entails successful matching of the available funds with all the required expenses as well as mechanisms for overcoming possible lack of funds. Environmental criteria were assessed in the range for any possible negative impacts of the heritage asset on the environment and/or environmental pressures on the environment to the possibilities for recreational activities in the surroundings.

The second set of criteria fully focused on the cultural values of the heritage asset. This set of criteria was more concrete and researched the following:

- **Scientific criteria**, e.g. possibilities of the cultural heritage asset for offering scientific research; existence of the scientific papers published on the cultural heritage asset, etc.;
- **Aesthetic**, e.g. aesthetic values offered by the heritage assets (e.g. scenic view to be enjoyed, artistic worth) and modalities of their sustaining;
- **Cultural/historic**, e.g. links of cultural heritage assets with cultural events; its presence in artworks, myths, legends and stories or to people and events that have historic importance; possible importance of the cultural heritage asset with religious or spiritual life, etc.;
- **Landscape**, e.g. connection of the cultural heritage asset with the surrounding landscape; its registration in national/international registers as a cultural landscape, etc.;
- **Uniqueness**, e.g. having unique features and its possible registration for its uniqueness (national/international registers, UNESCO, other);
- **Education**, e.g. the use of the cultural heritage asset for education purposes, etc.;
- **Local community**, e.g. close connection of the local community connected with the cultural heritage asset and intensity of this relation, etc.;
- **Economic**, e.g. the use of the cultural heritage asset for tourism, entrepreneurial activities (e.g. crafts, companies, souvenir production, etc.) or different other services (e.g. catering, hotels, food and beverage), or its use in promotional materials.

The last set of criteria questioned the transferability of the existing practice to other environments through their organisational models, policy making process (e.g. its consideration in local/regional/national policy planning and/or strategic documents), use of specific tools (e.g. training, financing, management) and the way they manage possible risks (e.g. environmental, operational, business risks). This being an important criterion is the most difficult to be assessed since it is difficult to anticipate if it would work in all countries. However, it may be tested at least within the project partnership.

3. Methods of data collection

This task mainly used the method of surveys with managers of cultural institutions. The survey was prepared in advance by the Institute for Development and International Relations (IRMO - PP07) and consisted of the template containing the criteria to be assessed complemented with the set of questions to be asked. The template was developed on the basis of the Interreg Europe good practice template but was adapted to the needs of this exercise.

Besides this method, the majority of partners also used the desk research method as to complement the field work.

Langhe Monferrato and Roero Development Agency (Lamoro - PP06) also used focus groups' method with cultural heritage managers.

4. List of collected examples of good practice per country

The report is important since it serves as a basis for the Collection of good practices document as the next step in the project. It is, therefore required for all the partners to plan their activities according to the envisioned plan so that setbacks can be avoided in the future course of the project.

4.1. Greece

In Greece, two good practice examples have been collected:

1. Conference of Paggaio Local History
2. Rehabilitation of the ancient city of Philippi.

The collection of good practices has been done in the period ???

4.2. Italy

In Italy, in the period of March – May 2019, the following three good practices were analysed:

1. The Natural Park of Stupinigi,
2. The Asti Museum Foundation,
3. The Landscape Museum of Magliano Alfieri.

The identification and analysis of each one of the good practices has been carried out by a mixed research method both desk and field based. During the whole analysis process, several interviews and focus groups (based on a structured questionnaire) with the main stakeholders acting on the cultural territorial background were conducted by the Langhe Monferrato and Roero Development Agency (Lamoro - PP06) team. At the same time, in each of the phases of the investigation, a great reference to the specific structural data and scientific sources was made.

4.3. Poland

In Poland, three good practice examples were collected:

1. Expansion of the Museum of the Kielce Village - Ethnographic Park in Tokarnia in order to preserve the cultural heritage - increasing the tourist attractiveness of the region

2. The Royal Castle in Chęciny as the historic place of power of the Świętokrzyska Land – a comprehensive development of the Castle Hill and the organization of the supra-regional event Siege of the Chęciny Hold
3. Sustainability in Soviet Architecture: improving energy efficiency of Voivodeship Cultural Center.

The good practices were collected in the period of May 2019 using the desk research method, surveys and interviews in all the three cases.

4.4. Portugal

Three good practices have been considered:

1. Interpretive Centre of Tresminas in Vila Pouca de Aguiar municipality
2. Flax/linen Museum in Ribeira de Pena municipality
3. Escavated/Rock Wine Mills in Valpaços municipality.

The practices have been collected in the period July - August 2019 using the interview, survey and desk research methods.

4.5. Spain

Three good practice examples have been collected:

1. The Raigame Pilgrimage project: an event celebrated in a small village, Vilanova dos Infantes, that helps to protect and restore the architectural and artistic heritage of the medieval complex.
2. Parador de Santo Estevo: a public hotel chain whose values include the conservation of historical buildings.
3. Estaciones: a project financed with European funds for the recovery of the old railway stations to preserve cultural heritage.

Good practice collection was take in the period May - June 2019 using the methodology of surveys and interview with the person in charge (Raigame Pilgrimage project and Parador de Santo Estevo) as well as desk research (Estaciones).

4.6. The Netherlands

Throughout May 2019, four good practice examples were collected:

1. Bulwark Saint-John: hospitality and tourism through (visible) heritage
2. Soete Moeder: repurposing religious heritage for hospitality
3. Mariënburg: repurposing religious heritage for education and housing
4. City wall area: parking solution through heritage restoration

Methods of collection used were desk research, interview and field survey (Bulwark Saint-John, City wall area: parking solution through heritage restoration); desk research and field survey (Mariënborg) or only desk research (Soete Moeder).

A summary report on the collection of good practices in cultural heritage sustainability is presented in the following table.

Table 1. Collected good practice examples by countries

Country	No. of GPs collected	Name of GPs collected	Period of collection
Greece	2	<ul style="list-style-type: none"> • Conference of Paggiao Local History • Rehabilitation of the ancient city of Philippi 	?? 2019
Italy	3	<ul style="list-style-type: none"> • Asti Museums Foundation • Landscape Museum of Magliano Alfieri • Stupinigi Natural Park 	March – May 2019
Poland	3	<ul style="list-style-type: none"> • Museum of the Kielce Village • Provincial House of Culture • Checiny Castle 	May 2019
Portugal	3	<ul style="list-style-type: none"> • Interpretive Centre of Tresminas in Vila Pouca de Aguiar municipality • Flax/linen Museum in Ribeira de Pena municipality • Escavated/Rock Wine Mills in Valpaços municipality 	July – August 2019
Spain	3	<ul style="list-style-type: none"> • The Raigame Pilgrimage project • Parador de Santo Estevo • Estaciones: Railway Stations 	May - June 2019
The Netherlands	4	<ul style="list-style-type: none"> • Bulwark Saint-John: hospitality and tourism through (visible) heritage • Soete Moeder: repurposing religious heritage for hospitality • Mariënborg: repurposing religious heritage for education and housing 	May 2019

		<ul style="list-style-type: none"> • City wall area: parking solution through heritage restoration 	
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5. Main summary and conclusions

The summary of the collected examples is presented below following the country logic. As much as all presented cases have some aspects which can be considered as good practice, no collected case study satisfies each of the criteria previously set. Still, the examples satisfy most of the criteria. Thus, most of them satisfy sustainability criteria. When it comes to cultural values, some of the cases may not satisfy some of the set criteria (e.g. Marienburg for uniqueness or Checiny Castle for scientific value). However, it should be stressed that not all of the criteria have the same impact on sustainability issues. Thus, e.g. economic viability will have more impact on cultural heritage sustainability which often relates to management issues than its unique feature or scientific use. Although the latter one has a great importance, they often ensure only indirect sustainability to heritage assets. It does not mean, though, that all of the cultural values criteria should be considered as less important; if economic viability over-powers e.g. cultural/historic value, it may lead to irretrievable destruction of the heritage asset itself failing to meet the sustainability criteria. This is why each good practice example should be carefully examined and discussed before its inclusion in the Collection of good practices document.

Most of the cases, in the same way, have been considered as transferable to other contexts. This, however, cannot be generalised since it would be impossible to envision all the possible contexts in which a single case may occur. This means that before trying to apply an individual good practice example collected in this exercise to another territory, further context-related research should be done.

5.1. Greece

The selected two good practice examples regard the classic rehabilitation project of a tangible heritage site and a somewhat unspecific one concerning the regular organization of a heritage-related scientific conference. Although the latter can be considered important, and certainly proves to be important for heritage itself as well as the community it belongs to, no directly measurable proofs are provided which would confirm the sustainability of Paggiao tangible or intangible heritage by way of organization of such an event. While it satisfies all set criteria measuring cultural values, and most of transferability criteria, the inclusion of this type of good practice examples in the Collection of good practices should additionally be discussed.

Good practice example	Criteria	Compliance with the criteria
Conference of Paggaiò Local History	Sustainability	partially met (environmental impact – neutral – 1. c)
	Cultural values	+
	Transferability	partially met (critical issue – risk management - 3. d); specific tools - 3. c) N/A)
Rehabilitation of the ancient city of Philippi	Sustainability	partially met (critical issue – economic viability 1. b)
	Cultural values	+
	Transferability	+

5.2. Italy

Each one of the good practices, selected thanks to a complex research, represent the virtuous example of the effort carried on by three different territorial players including a private foundation, a volunteer organization supported by the local institutions and a public body to enhance a participatory and informed systems of government of the local cultural heritage.

Focused on the responsible development of the territory, each one of these examples have shown to adhere both to the three general criteria of sustainability, cultural value's increase and the transferability and to the specific criteria, However, not every criterion set is met as presented in the table below:

Good practice example	Criteria	Compliance with the criteria
The Stupinigi Natural Park	Sustainability	+
	Cultural values	+
	Transferability	partially met (critical issue - organisational model - 3. a)
The Asti Museum Foundation	Sustainability	+
	Cultural values	partially met (critical issue - uniqueness 2. e)
	Transferability	+
The Landscape Museum of Magliano Alfieri	Sustainability	partially met (critical issue - environmental impact 1. c)
	Cultural values	+

	Transferability	+
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For example, if the Stupinigi Park could represent an excellence in terms of social, cultural and natural impact on the territory, we cannot say the same about the governance model of the whole system it belongs to (a complex governance system made up by three different players with a weak relationship among them).

Meanwhile, the Asti Museum is a model of virtuous cultural management: a public heritage is managed by a public-private Foundation in order to be valorised in not-for-profit way. But the members of the local community, even though welcoming the reopening of the Museum, do not actively participate in its activities and do not visit the Museum regularly. So far, it is an efficient model of cultural management, only with time its sustainability could really be tested.

Finally, the Museum of Magliano Alfieri, that could be defined as an effective tool to represent the effort of the local community to improve the tourism and cultural offer of the territory, combining all the advantages and disadvantages to be linked to a limited territory.

5.3. Poland

All good practices are transferable worldwide. It should be noted that in the case of two institutions implementing the aforementioned projects, they are able to self-finance their current operations thanks to proper management. In addition, the fact that institutions implementing them have direct support of decision-makers of regional authorities is extremely important in the process of implementation of these projects as well as self-financing of these facilities. The participation of local communities in these projects has an impact on the promotion and dissemination of the activities of these institutions.

Good practice example	Criteria	Compliance with the criteria
Museum of the Kielce Village	Sustainability	partially met (critical issue – economic viability 1. b)
	Cultural values	+
	Transferability	+
Provincial House of Culture	Sustainability	+
	Cultural values	partially met (critical issue – aesthetic value 2. b)
	Transferability	+
Checiny Castle	Sustainability	+

	Cultural values	partially met (critical issue – scientific value 2. a)
	Transferability	+

5.4. Portugal

All the collected examples initially relied on the public investment, either related to direct financial incentives or indirect ones (such as promotion). Public investment was either national or European, and in some cases, co-financing has been provided by private SMEs. When it comes to management, private entities, specifically in the form of associations are involved.

All of the practices are directly related with local and cultural values, deeply connected with the history of the country and of this regions' inhabitants. Other relevant aspects representing good practice are the reconstruction of existing buildings which respects traditional architecture lines as well as the preservation of artefacts and production processes.

All the examples can be adapted to other regions and countries, as long as there is ensured the proper linkage with heritage values, particularly their uniqueness.

Good practice example	Criteria	Compliance with the criteria
Interpretive Centre of Tresminas in Vila Pouca de Aguiar municipality	Sustainability	+ (*economic viability 1. b), environmental impact 1. c) and social impact 1. d) N/A)
	Cultural values	+ (*economic value 2. h) potentially existing but still N/A)
	Transferability	+ (*organisational model - 3. a) and specific tools 3. c) N/A)
Flax/linen Museum in Ribeira de Pena municipality	Sustainability	+
	Cultural values	partially met (critical issue - uniqueness 2.e)
	Transferability	+
Escavated/Rock Wine Mills in Valpaços municipality	Sustainability	+ (*social impact 1. d) N/A)
	Cultural values	+
	Transferability	partially met (critical issue – risk management 3. d)

5.5. Spain

All GP mentioned are considered transferable to other countries with similar economic and social features. These three good practices are being supported by public institutions in order to preserve the values of cultural heritage. It should be noted that all of them have got a special event that helps to promote and improve the ways to manage the cultural heritage.

Raigame Pilgrimage and Parador de Santo Estevo are very important in their archeological and architectural values and in all three GPs the restoration was carried out by the technical supervision of the Regional Government Department.

The participation of local communities in these projects is being an essential point to assure the protection, the valorization and sustainability of cultural heritage. The local community has integrated them in their daily life, and they are considered a lifestyle.

Raigame Pilgrimage project has proven to bring a great contribution to the local development (road infrastructure, County cultural centre establishment, permanent exhibition, improvement of the historic centre, attraction of a number of visitors). The information provided for the Railway Stations, however has not been sufficient as to be able to draw valid conclusions and should, therefore be additionally discussed.

Good practice example	Criteria	Compliance with the criteria
The Raigame Pilgrimage project	Sustainability	partially met (critical issue – economic viability 1. b)
	Cultural values	partially met (critical issue – economic value 2. h)
	Transferability	partially met (critical issue – risk management - 3. c)
Parador de Santo Estevo	Sustainability	+
	Cultural values	partially met (critical issue – educational value 2. f)
	Transferability	+ (*risk management 3. d) N/A)
Estaciones: Railway Stations	Sustainability	?
	Cultural values	?
	Transferability	?

5.6. The Netherlands

These redevelopments can be considered good practices. They maintain or restore heritage values, while focussing on sustainable long-term exploitation (break-even or

creating revenue). Regarding the Bulwark Saint-John the addition of archaeological finds adds to a diachronic narrative and visitor experience, making heritage more tangible. Especially interesting is the case of City wall area: parking solution through heritage restoration (an underground cathedral as an entrance to the city), which used an unusual way of presenting the past in the garage. It is an innovative example of using crowdfunding campaigns and social initiatives involving the citizens and thus ensuring participation as well as sustainability. All practices are transferable to other sites, both within the Netherlands and worldwide, due to overall themes like fortifications and secularisation.

Good practice example	Criteria	Adherence to criteria
Bulwark Saint-John: hospitality and tourism through (visible) heritage	Sustainability	+
	Cultural values	+
	Transferability	+
Soete Moeder: repurposing religious heritage for hospitality	Sustainability	partially met (critical issue - environmental impact 1. c)
	Cultural values	partially met (critical issue – landscape 2. d); uniqueness 2. e)
	Transferability	+
Mariënburg: repurposing religious heritage for education and housing	Sustainability	partially met (critical issue - environmental impact 1.c)
	Cultural values	partially met (critical issue – uniqueness 2. e)
	Transferability	+
City wall area: parking solution through heritage restoration	Sustainability	+
	Cultural values	+
	Transferability	+

Although some partial criteria in the presented examples have not been met, their importance in terms of sustainability and cultural values preservation is of less importance and all four examples may be regarded as good practice examples.

6. Challenges in the implementation of the analysis and the next steps

The greatest challenges encountered in the process of surveying cultural institutions' managers and experts relate to the lack of understanding of some of the previously defined criteria which caused additional refinement of the documents. While hiring experts for cultural heritage to do the surveying might see as a good solution, this extends the process due to the public procurement and presents the challenge itself. Insufficient English language proficiency alongside the lack of understanding of the heritage criteria additionally complicates the process.

Among all the assessment criteria, transferability posed the biggest challenge since one would have to have specific knowledge in order to confirm if the specific case would be transferable to another country. It is planned, however, to test it within the project partnership.

The analysed examples of good practice serve as the basis for the production of the document containing the Collection of good practices in cultural heritage sustainability and durability. Therefore, the next steps in the project implementation are the decision on the selection of best practices to be included in this document. The next project meeting will also try to solve the issue of the transferability of collected good practices within the project countries.

This exercise already reveals that the decision on the selection of the best practices to be included in the Collection of good practices in cultural heritage sustainability and durability document will be a challenging one which is primarily due to the diversity of collected examples. Further on, majority of examples do not comply with all of the set criteria (which would seem practically an impossible task) which does not necessarily mean that they cannot be categorized as good practice examples. Finally, not all of the previously set criteria are equally important in ensuring sustainability and durability of cultural heritage which may impact the selection process.

Annex - Good Practice template

1. General information	
Title of the practice	[100 characters]
Does this practice come from an Interreg Europe Project	Yes or no [Technical: Good Practices outside the IR-E projects relevant to the topics and validated by the Policy Learning Platforms experts will also be included in the database]

In case 'yes' is selected, the following sections appear:

Please select the project acronym	Drop down menu with all acronyms
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Specific objective	Drop-down list of the 6 specific objectives [Technical: In case a project is selected, the specific objective is automatically completed]	
Main institution involved	[Technical: The name of the institution and location of the practice are per default those of the practice author. They remain editable.]	
Location of the practice	Country	Drop-down list
	NUTS 1	Drop-down list
	NUTS 2	Drop-down list
	NUTS 3	Drop-down list

2. Detailed description	
Detailed information on the practice	<p>[1500 characters] Please provide information on the practice itself. In particular:</p> <ul style="list-style-type: none"> - What is the problem addressed and the context which triggered the introduction of the practice? - How does the practice reach its objectives and how it is implemented? - Who are the main stakeholders and beneficiaries of the practice?

Resources needed	<i>[300 characters] Please specify the amount of funding/financial resources used and/or the human resources required to set up and to run the practice.</i>
Timescale (start/end date)	<i>e.g. June 2012 – May 2014/ongoing</i>
Evidence of success (results achieved)	<i>[500 characters] Why is this practice considered as good? Please provide factual evidence that demonstrates its success or failure (e.g. measurable outputs/results).</i>
CRITERION 1 Sustainability	
1.a) Impact on safeguarding of cultural heritage	
1.b) Economic viability	
1.c) Environmental impact	
1.d) Social impact	
CRITERION 2 Cultural values	
2.a) Scientific	
2.b) Aesthetic	
2.c) Cultural/historic	
2.d) Landscape	
2.e) Uniqueness	
2.f) Educational	
2.g) Local community	
2.h) Economic	
CRITERION 3 Transferability	
3.a) Organisational model	
3.b) Policy making process	
3.c) Specific tools (e.g. training, financing, management)	
3.d) Risk management	
Difficulties encountered/ lessons learned	<i>[300 characters] Please specify any difficulties encountered/lessons learned during the implementation of the practice.</i>
Potential for learning or transfer	<i>[1000 characters] Please explain why you consider this practice (or some aspects of this practice) as being potentially interesting for other regions to learn from. This can be done e.g. through information on key success factors for a transfer or on, factors that can hamper a transfer. Information on transfer(s) that already took place can also be provided (if possible, specify the country, the region – NUTS 2 – and organisation to which the practice was transferred)</i> <i>[Technical: A good practice be edited throughout a project life time (e.g. to add information on the transfers that have occurred)]</i>
Further information	<i>Link to where further information on the good practice can be found</i>
Contact details <i>[Technical: the contact details will be visible only to “Policy Learning Platforms registered members”]</i>	
Name	
Organisation	
Email	

Expert opinion	<i>[500 characters] [Technical: to be filled in by the Policy Learning Platforms experts]</i>

- NB: in orange: 2 optional fields. All other fields are compulsory.