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This document and the baseline survey has been drafted by the School of Arts - KASK of HOGENT University of Applied Sciences and Arts, one of the five partners in the Innocastle project. Part 1 and 2 draw from the baseline survey of each partner as well as the study visits, thematic seminars and different discussions. In part 3 each partner developed their own chapter, based on the framework of the baseline survey.

### STRUCTURE OF THE DOCUMENT

This document is a search of common ground through four regional zooms. It is divided in three parts.



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#### IN SEARCH OF...

In the first part a comparison is made between the regions by looking at the data and knowledge collected during the project. The first chapter is structured along the four strands of the methodology and analyses the regions, rural estates, policy instruments and stakeholders. The second chapter explores the challenges and potentials of rural estates by looking into the three themes of the project: 'governance & partnerships', 'economic development' and 'promotion & visibility'.

#### ...COMMON GROUND

In the second part a common ground is developed. In chapter three the different historical castles, manors and estates in the participating regions are defined as one type of heritage with specific characteristics. It is a tentative proposal intended to open the debate on the shared qualities of these sites across Europe. In the fourth chapter the common ground is made explicit by translating the needs of the different sites into 13 shared policy recommendations. These recommendations are intended to help increase the development possibilities of this European heritage type on a national and international level.

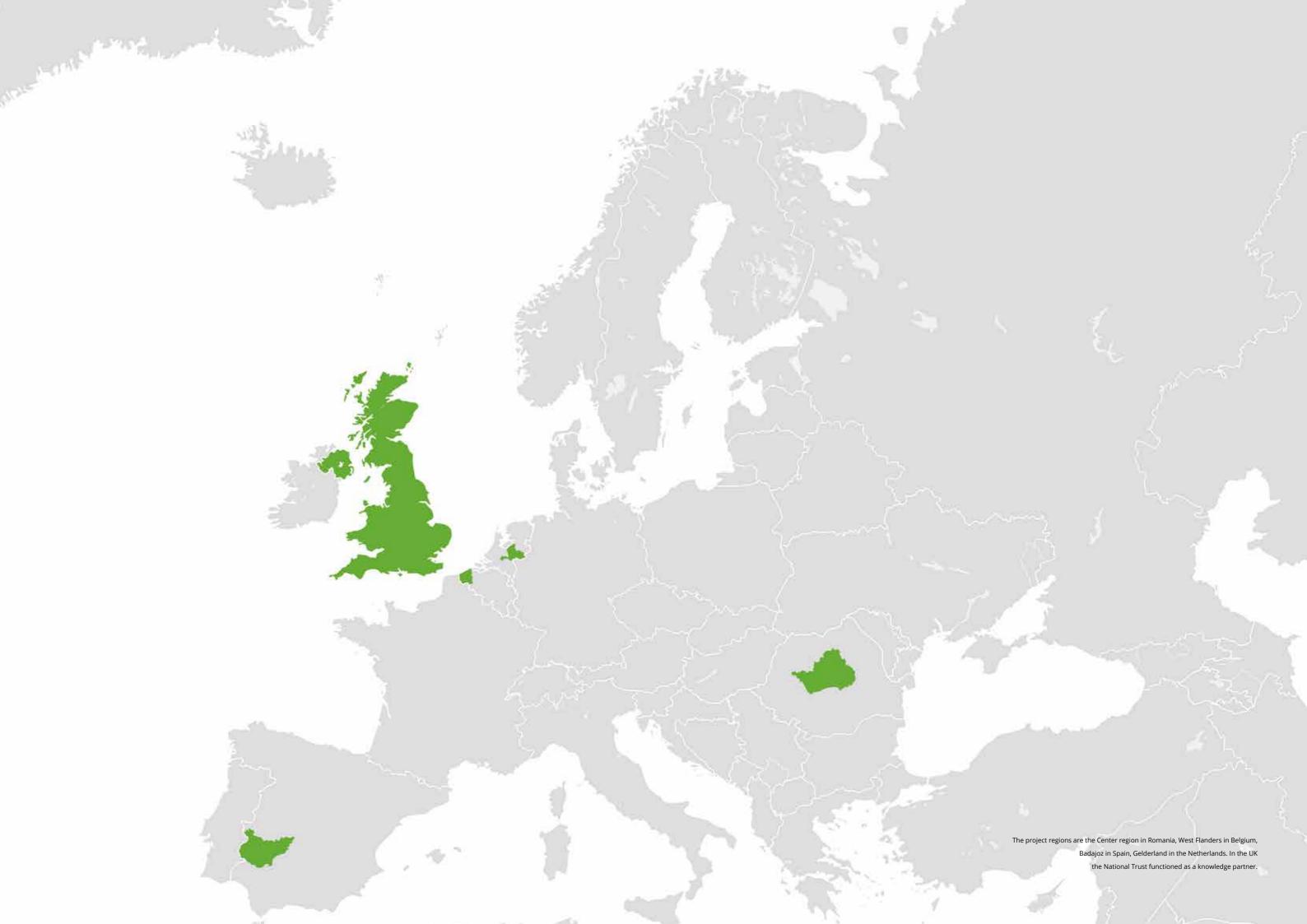
#### FOUR REGIONAL ZOOMS

The third part of this document collects the four chapters drafted by the different regions as part of the baseline survey. Each chapter within this section groups basic information along the four strands of the baseline methodology as well as information on the learning cases and first thoughts on the development of the local action plans. Together, they form the solid base for the comparison between the different regions found in section one and for the development of the action plans to improve the preservation, transformation and exploitation of rural estates in each region.



# **INTRODUCTION**

This document is the result of the baseline survey executed within the scope of the Innocastle project. It is an exploration of the rural estates - historical castles, manors and estates - as well as the policies and actors that influence these sites in four European regions. The study takes a forward looking approach to rural estates by identifying and exploring the future potential of these sites and the elements influencing that potential. As such it forms a basis for improving policies in the four regions to better support the preservation, transformation and exploitation of this heritage towards the future. By exploring the similarities and differences between these regions it as well tries to find common ground between them and get a better understanding of this heritage in a broader European perspective.



## ABOUT THE PROJECT

Innocastle is an Interreg Europe funded project running from mid-2018 to the end of 2022. The central issue addressed is that in most European countries, current policies towards the preservation, transformation and exploitation of historic castles, manors and estates are outdated and do not reflect their real needs and opportunities. There is a need for better and more integrated governance, a better understanding of the economic possibilities and better promotion and visibility for these historic sites.

#### **PARTNERS**

The project is a collaborative effort of five partners who have worked in five regions across Europe on the topic of rural estates. Four partners worked within the project on a region and instrument while the National Trust functioned as knowledge partner.

#### THE FIVE PARTNER ORGANISATIONS OF THE PROJECT.

The National Institute for Heritage in Romania

The School of Arts-KASK of the HOGENT University of Applied Science and Arts in Belgium

The Provincial government of Badajoz in Spain,

The National Trust for Places of Historic Interest or Natural Beauty in the United Kingdom

The Province of Gelderland in the Netherlands

#### RURAL ESTATES

At the core of the Innocastle project lie the many historical castles, manors and estates which can be found in the different partner regions as well as the rest of Europe. Within this document, these three notions are consequently referred to as 'rural estates'. Within this project this refers to a historical, multifunctional, rural or peri-urban entity composed of different parts which was historically managed as a unity and incorporated living quarters for the landlord.

From a historical perspective it is not correct to group these three notions into the overarching concept of rural estates. As however explained in chapter 2 of this document the reason to do this is inherently future oriented. Referring to the different sites as either a castle or manor house for example points towards the difference between the two. These differences are however mainly historical or architectural and obliterate the many similarities these sites have when considering the potential they have for us now and in the future.

#### **OBJECTIVE**

The overall objective of Innocastle is to ensure the sustainable preservation of rural estates in four participating regions. By developing and supporting the implementation of four action plans targeting four specific policy instruments addressing these sites, Innocastle will remodel current policies to better reflect the trends and future requirements such as more place-based approaches, the need for economic and environmental resilience, and multi-actor involvement.

Innocastle's approach centres around three main activities which together form the interregional learning of the project:

- Development of a joint baseline survey on the preservation, transformation and exploitation policies and practices based on a common methodology.
   Analysing the current status of heritage policies in the partner regions.
- Organisational learning through study
  visits to each participating region.
  These study visits consist of visiting
  inspirational sites in each country,
  collecting transferable good practices, a
  thematic seminar based on local needs,
  a peer review, a participant satisfaction
  survey and a learning report to ensure
  the proper documentation of all study
  visits.
- A regional action plan to improve the targeted policy instruments of each partner based on the input collected in the baseline survey, the study visits, the peer reviews and regional stakeholder meetings.

## **METHODOLOGY**

# FOUR STRANDS OF THE METHODOLOGY

A methodology was developed in the first semester of the project which combined the collection of qualitative and quantitative data. These data have been collected along four strands which guided us to a better understanding as well as to the development of the local action plans. What are the specificities of each region, the condition of the rural estates, the policy contexts in which they find themselves and the stakeholders involved? While this methodology is structured around these four strands, understanding their interaction is crucial. Transversal moments within the process as well as the study visits bring these four strands together.

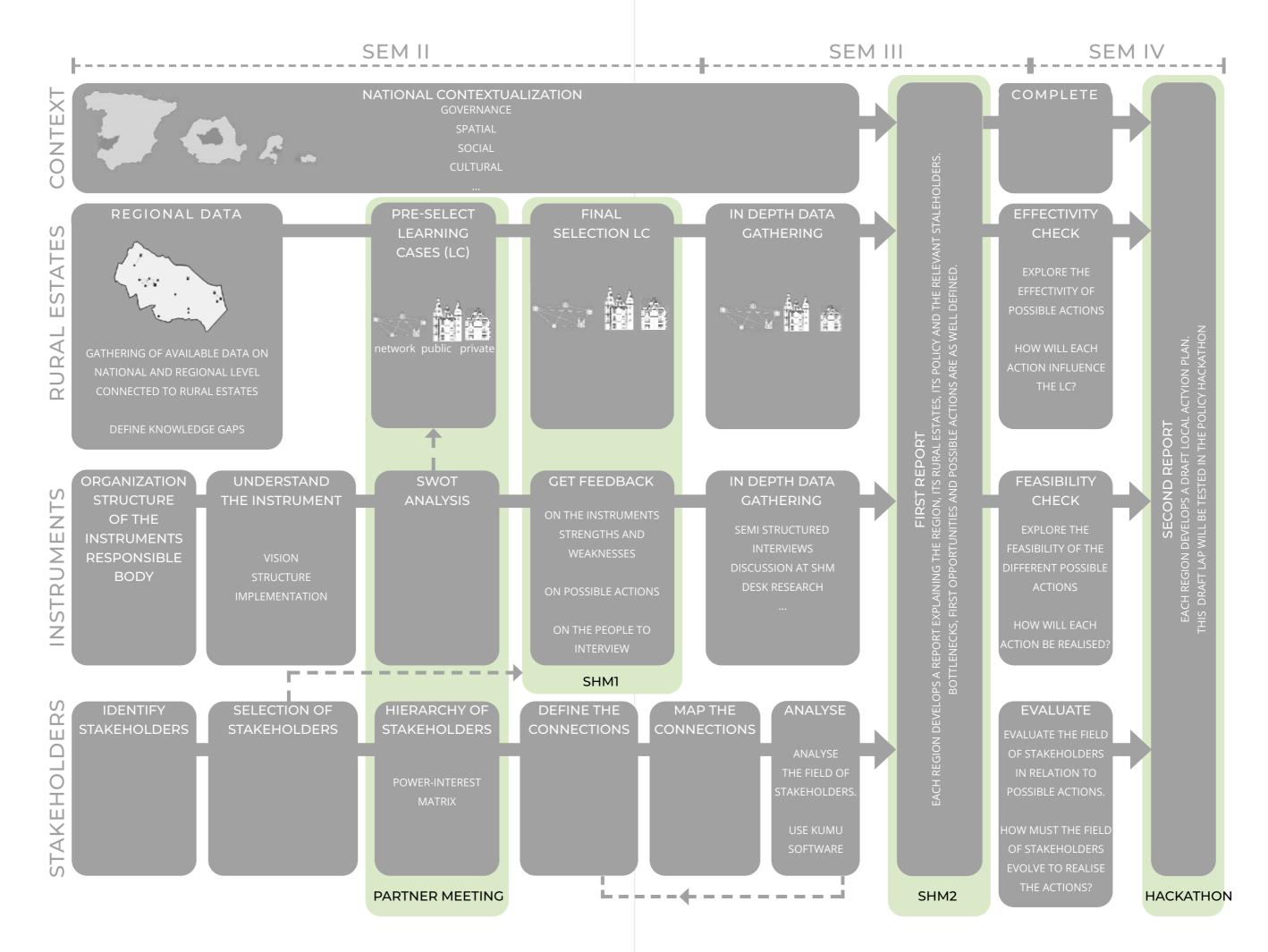
#### DATA CHALLENGES

The data collecting along these four strands proved difficult for many reasons:

- Readily available quantitative data on rural estates is almost non-existent and the scope of the project did not allow to collect large sets of data. The data sets that were available are incomplete or not standardised.
- The difference between the rural estates in the four participating regions is huge. The data that could be partially collected on the rural estates revealed large differences between the regions. The lack of further detailed information hindered a full quantitative comparison.
- The four target policy instruments are from a different category and all have a different objective. While it is valuable to understand the different approaches it makes difficult a more detailed comparison. Relevant information for one instrument either does not exist or is irrelevant for another instrument for example.

Due to these difficulties this document cannot be read as a full baseline survey in which an overarching set of data is collected to function as full comparison between regions and between start and finish of the project. The document can however be understood as an exploratory research giving insight into the different regions and the striking similarities and differences between them.

As such these challenges had their value as they were the starting point of many discussions leading to insights and policy recommendations described in this document.



## **EUROPEAN PERSPECTIVE**

The project started out a shared a concern for the future of the rural estates in each region. Although there is no geographical link, no direct shared history or similarity between the different sites across the regions, they all face challenges which somehow endanger their existence. These challenges are hugely different between regions but often relate to similar topics such as spatial change, climate change, economic change and so forth. By approaching rural estates in this project for the potential they have to address the many challenges related to these topics, it is our intention to bind their future development to the future development of Europe.

well difficult to transfer to other regions. The pan-European aspect of the 'Heritage Houses for Europe. Exchange & Innovate' project does the opposite and collects knowledge on a European level. Information on the qualities, functions and financial situation of heritage houses across Europe is collected through an online survey. This is supplemented with key stakeholder interviews and workshops amongst other activities. Although this study gives a very interesting overview, the scope of the project did not allow a detailed and in depth zoom on a specific region. As such it is missing certain nuances and context to understand the elements at play in each region in detail.

depth of knowledge which is unique but as

#### OTHER EU PROJECTS

Previous European funded research reveals other regions share this concern towards the future existence of rural estates as well. Most recent examples are the Interreg project 'South Baltic Manors' and the research project 'Heritage Houses for Europe. Exchange & Innovate'. Innocastle and these two projects all have a different geographical logic. The 'South Baltic Manors' project is geographically focused, the 'Heritage Houses for Europe. Exchange & Innovate' project is pan-European and the Innocastle project is based on geographical random sampling. This methodological diversification makes them complementary. The geographical focus of the 'South Baltic Manors' project will give unique insights in the rural estates in a specific region with a shared culture and history. This will realise a certain

#### INNOCASTLE'S ADDED VALUE

The detailed focus of the Innocastle project on four different regions in Europe through a shared methodology adds to this with its own approach. The local focus ensures a detailed understanding of the elements at play in each region and results in nuanced findings on the one hand. On the other hand, the shared methodology ensures a certain generalizability. The common ground between these four random regions will probably be common to more regions in Europe as well. As such, we understand this study as both a combination of the above mentioned projects and complementary to them.



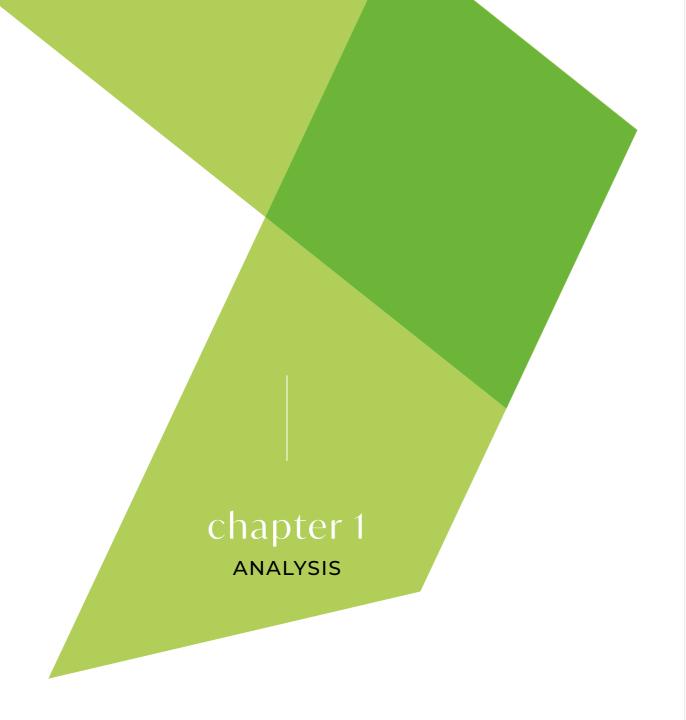




IN SEARCH OF...

In the first part a comparison is made between the regions by looking at the data and knowledge collected during the project. The first chapter is structured along the four strands of the methodology and analyses the regions, rural estates, policy instruments and stakeholders.

The second chapter explores the challenges and potentials of rural estates by looking into the three themes of the project: 'governance & partnerships', 'economic development' and 'promotion & visibility'.



This chapter functions as a comparison of the different regions and it follows the structure (four strands) of the methodology used to execute the baseline survey. By using a shared methodology to collect data on the different regions, rural estates, policy instruments and stakeholders it is possible to discern some striking similarities and differences. The different regional chapters at the end of this publication use the same structure and as such it is easy to switch between these chapters and elaborate on the findings.

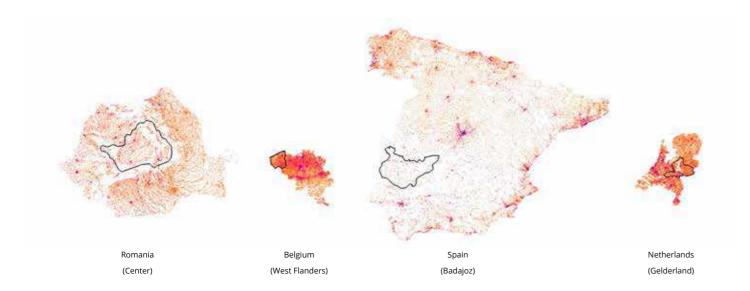
Together with the next chapter, this forms part I of the document which is a search towards common ground on the characteristics, the challenges and opportunities of rural estates in the different regions. This search uses the data collected within the different regions (part III) and is complemented with knowledge gathered during the study visits, the different partner meetings and existing literature and studies.

In part II of this document, the common ground is found by developing shared characteristics and policy recommendations.

ROMANIA.				
Center region •				
Regional classification	n Nuts 2•			
Regional Operational	Programme 20	14-2020: Pri	ority 5.1	
BELGIUM.				
Province of West Flar	nders			
Regional classification	n Nuts 2			
Flanders Decree of In	nmovable Herita	ige		
SPAIN.				
Province of Badajoz •				
Regional classification	n Nuts 3			
Regional Operational	Programme for	Extremadu	ra objective	6.3.1
NETHERLAND	S •			
Province of Gelderlar	nd •			
Regional classification	n Nuts 3			
Policy Program cultu	re & heritage 20	17-2020		

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## <sup>1.1</sup> REGIONS



	CENTER	WEST FLANDERS	BADAJOZ	GELDERLAND
Size (km²)	34100	3125	21766	5136
Population density (Inh/km²) (Target region / National)	68,4 / 82	379,7 / 377	31,4 / 92	68,4 / 408
5 Year demographic change (Target region / National)	-1,1% / -2,3%	1,4% / 2,4%	-1,6% / -1,5%	1,8 / 2,1%
Percentage nature (Target region / National)	>35% / 22,7%	5% / 15%	26,2% / 27,3%	22,5 / 12%

The four participating regions are different in many ways. While the map and table above reveal these differences strikingly, in what follows we zoom in on a handful of comparable aspects of these regions in search of a more nuanced understanding of the similarities and differences.

# METROPOLITAN - RURAL LANDSCAPES

West Flanders and Gelderland are both part of the same metropolitan landscape.

This highly connected urban patchwork is an extremely populated area with more than 20 million inhabitants. In West Flanders, as in the rest of Flanders, the urban sprawl is larger compared to Gelderland. This is for example visible in the population structure by urban-rural typology, as Eurostat statistics indicate that in Flanders a larger part of the population is living in intermediate regions compared to Gelderland. In contrast to Gelderland and West Flanders, both Badajoz and the Center region are dealing with a slow decline in population. In Badajoz

# RURAL ESTATES CAN BECOME FOCAL POINTS WITHIN RURAL EUROPE FOR MANY DIFFERENT

**REASONS.** They can be the protectors of open space, the drivers for rural development, the attraction points in the landscape or the reinterpretation of the link between city and countryside. They cannot do this alone as standalone restorations or investments are often insufficient and a regional approach is needed.

the population density is only one third of the national average and this percentage is still decreasing in favour of the larger cities and coastal regions away from the province of Badajoz. Rural depopulation is the most urgent demographic challenge for Badajoz as such. This is not the case in Romania where the demographic changes are mainly caused by emigration, and they are not influencing the urban-rural ratio in the region. In Center nevertheless, the population is concentrated in the main cities.

#### SPATIAL FRAGMENTATION REQUIRES REGIONAL APPROACH

Spatial fragmentation is a challenge in all four regions for different reasons. In West Flanders and Gelderland, urban pressure on the open space is a day to day challenge certainly around the city centres. This is influencing the rural estates and surrounding landscapes in so much that infrastructural works cut through

rural estates, housing is built on former estate grounds, water levels are influenced heavily, protected nature is found next to monoculture agricultural grounds and so forth. However, this urbanization density is valuable as well to find potential investors, visitors and volunteers. In Badajoz rural depopulation is hindering development possibilities for the rural estates and they are in danger of becoming difficult to develop islands amidst large scale agricultural fields. The challenge here is to create the critical mass to reverse this (increasing the means & manpower, creating touristic sites and itineraries, increasing job opportunities and so forth). Standalone restorations or investments are often insufficient and a regional approach is needed. In Romania large land reform acts, the communist regime and the following nationalization and restitution processes have disconnected land from estate resulting in the fragmentation of these sites. In Spain as well land reforms have created a break with historical land management.

#### NATURE

According to Eurostat both Gelderland and the Center region have a relatively high percentage of protected nature in relation to their national average and in Gelderland this is almost double. West Flanders has the lowest percentage and with 5% it has only 1/3 of the national average. Within West Flanders the largest forest cluster is found in a region with a high percentage of rural estates. The 'loss of core natural landscapes' indicates the rate of fragmentation in the core natural and seminatural areas in Europe. While Gelderland and West Flanders are relatively stable, Romania in its totality as well as the South Western provinces in Spain, such as Badajoz, are rapidly becoming more fragmented today.

#### TOURISTIC POTENTIAL

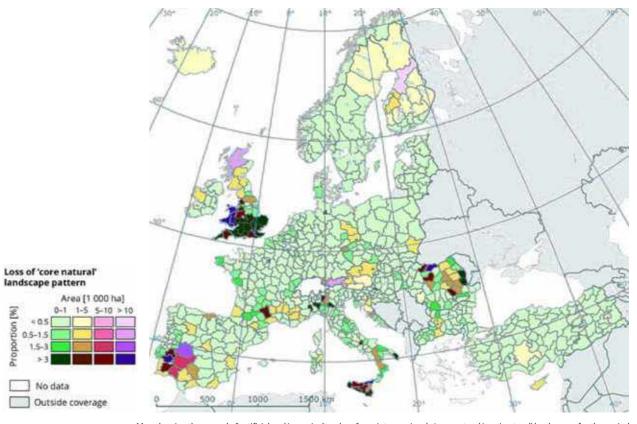
In Romania over the last years an average of three nights was spent by tourists per inhabitant while in Spain, the Netherlands and Belgium this was close to ten or more (Eurostat). Romania is not known as a tourist destination and domestic tourism is also lower

than in the other countries. Only 4% of the household budget is spent on recreation, culture, restaurants and hotels while in the other three regions this is around 15%. The Center region is however one of the better performing regions within Romania attracting almost a quarter of the national tourist arrivals. This is mainly due to the Transylvania brand which is known for its natural and cultural assets. However, this is only tangible in a small part of the Center region. In contrast, tourism in Spain is mainly focused on the major cities and coastal regions. As the rural province of Badajoz does not fall into this category, tourist accommodation is declining steeply here (Eurostat). West Flanders is one of the most popular destinations in Belgium due to the coastline as well as to the city of Bruges. As statistics on day trip tourism indicate however, tourists to these two major attractors only rarely visit the surrounding rural areas. In these rural areas heritage is moreover not indicated as the reason to visit and most choose a region based on its recreational value (hiking, biking, sporting). Explaining and making explicit the link between the current recreational qualities of these rural areas and their history with its rural estates will increase visitors' interest in rural estates.



## "What struck me in this area was the combination of really big and interesting castles and this incredible landscape".

During the study visit to Badajoz Paul Thissen from the Province of Gelderland is mesmerized by the connection between the rural estates and surrounding landscape. Explaining and making explicit that link will increase visitors' interest in rural estates.



Map showing the spread of artificial and/or agricultural surfaces into previously 'core natural/semi-natural' landscapes for the period 2000-2006. For example, one province in the West of Spain had its 'core natural' pattern reduced by 1.5% to 3% due to fragmentation by agricultural and/or artificial lands, from a cumulative area of more than 10 000 ha – European Environment Agency









## <sup>1,2</sup> RURAL ESTATES

# A RURAL ESTATE AS DEFINED BY THE PROJECT REFERS TO HISTORICAL CASTLES, MANORS AND ESTATES

ACROSS EUROPE. It is a historical, multifunctional, rural or peri-urban entity composed of different parts which are managed as a unity and which incorporated living quarters for the landlord historically.

#### IDENTIFYING RURAL ESTATE

#### What is a rural estate

What exactly is a historic castle, manor or estate? In 'Forum for the future' (2006) an estate is described as an area of land, incorporating agriculture alongside other land-based businesses, managed as a whole organisation with overlying aims. Estate ownership may be through a family or a separate business enterprise and it includes both private and publicly owned estates. Size does not matter. Van Hövell & Teng (2012) described them as economic, ecologic, spatial and culturalhistorical unities which are managed for the long term, coordinated from one central point and according to a system of integrated sustainability. Based on these statements, alongside the overall project objective and suggested sites in the different regions, the project partners debated and agreed their definition of 'rural estates' at the first partner meeting.

Rural estates are understood as historical, multifunctional, rural or peri-urban entities composed of different parts which were managed as a unity and which historically incorporated living quarters for the landlord. This last element was added as a criterion within the project for different reasons. Firstly, it is believed that heritage which has been private for at least a large part of its existence faces other challenges than heritage which has always been public. Secondly, privately owned estates have a certain economic logic which has been under pressure during the last century. Finding new economic developments for these places through private, public or private/public partnerships is a big challenge. Thirdly, it is believed that private ownership in the past added a certain quirkiness to these places which was and is the perfect breeding ground for innovative developments and unique insights. This project definition helped to understand the most basic common ground between the partner regions.

#### **Identifying rural estates**

In order to identify the rural estates within each region, existing heritage databases were used. For West Flanders and Gelderland the national heritage inventory was used. For Center and Badajoz, databases developed by NGO's were used as they revealed more accurate or fit for the Innocastle project than the official equivalents. The Flemish and Spanish databases do not have a fitting typology to easily identify rural estates. In Gelderland the database does not cover all heritage as it only incorporates nationally protected. In the Center region the database is part of an ongoing country wide project. In the Center region it has full cover. As each of these databases has certain limitations or a different approach, it is impossible to get a fully comparable view on the number of rural estates within the different regions. It is however a good starting point to collect information and get a better insight into the rural estates in each region.

	CENTER	WEST FLANDERS	BADAJOZ	GELDERLAND
Identified # rural estates	156	235	66	216
Inventory used	Monumente Uitate inventory	Flanders heritage inventory	Asociación Española de Amigos de los Castillos' inventory	National monument registry
Scope of the inventory	Protected and unprotected heritage	Protected and unprotected heritage	Protected and unprotected heritage	Protected heritage
Type of heritage protection included	All types (national & local)	Only one type of protection exists	All types (national, regional, local,)	Only the nationally protected
Typological identification needed to identify the rural estates in the inventory	No identification necessary, the full inventory fits the typology of rural estates.	Difficult but fitting identification. Heritage typologies with 'castle' or 'country house' in their name.	Easy but only partly fitting through the heritage typology 'Medieval Military Castle' and 'Medieval and Palatial Castle'	Easy and fitting identification through the heritage typology 'Castles & Country Estates'

#### REGIONAL SCALE

#### **Regional clusters**

Looking at the numbers of rural estates mentioned above theoretically there is a rural estate in Badajoz each 23 kilometres, in the Center region each 15 kilometres and in Gelderland and West Flanders each 4 to 5 kilometres. However, in all four regions rural estates are not spread homogeneously throughout the region. Looking at the identified rural estates, clusters with a higher density of domains are visible in the hinterland of cities, on historical traveling routes or in areas with specific geographical, geological or political conditions. This is the case in Gelders Arcadia, the Landscape park Bulskampveld, the Mureș river valley and the mountain ranges in Badajoz. In these areas the density of rural estates can be up to five times the regional average and together with other heritage elements these clusters often form hotspots of cultural landscapes. Identifying these clusters is important as their coherence can add to the

identity of the specific region. Moreover, the specific possibilities for development of the rural estates in the clusters can be linked to regional challenges. In rural areas under urban pressure a better understanding of the clusters of rural estates could help safeguard the region from further fragmentation for example. In depopulating regions their identification could create the needed critical mass to attract investment.

These clusters vary greatly in size, ranging from a few estates in the border of one municipality to a river valley crossing a few hundred km's. The estates in these clusters differ in their ownership, use, size or quality as well. Because of these large differences within a cluster, both a regional and a project oriented approach are necessary to understand and explore the potential of each one of these clusters.



"The study visit to Romania has made me even more determined that rural 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, UCG-KASK

#### Urban - rural

In all four regions we can identify rural estates which are geographically positioned directly next to the centres of rural municipalities and estates which have a more distant relationship to those centres. This is clearly the case in Badajoz where 70% of the rural estates lie in the centre of the municipality or directly borders it. The other 30% has almost no connection to the closest municipality. In West Flanders this distinction is least pronounced because the explosive urban sprawl in the 2nd half of the 20th century has blurred the spatial distinction between municipal centre and the open space.

#### Relation to the landscape

Although it is not always visible at first sight, all rural estates have a certain relationship with the rural landscape around them. The earliest rural estates are most often castles which had a certain protective connection

ALL RURAL ESTATES ORIGINATED OUT OF THEIR DIRECT RELATIONSHIP WITH THE LANDSCAPE. THIS RELATIONSHIP WAS ONE OF **POWER AND MANIFESTED** ITSELF IN DIFFERENT WAYS THROUGHOUT HISTORY: From protection to control and production to aesthetical enjoyment. These different relationships are today under pressure by the changing social, economic and spatial context. Redefining that relationship with the landscape creates an opportunity to transform the estates from places of power to places of co-creation, ecosystem services, education, sustainable food & energy production and small scale tourism.

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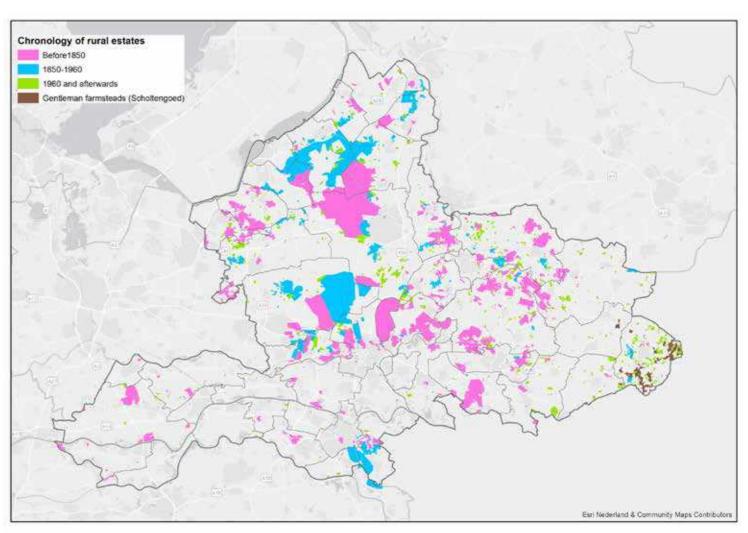
to the landscape. This is best understood by looking at the many castle sites in the region of Badajoz. These are fortified sites on higher strategic positions within the landscape built amongst others to protect the people inside. In the other regions as well, a large part of the estates originate out of this protective function. However, most of them have in the course of history been altered to meet different requirements. This protective connection is often closely linked to the control over the landscape. Strategic positioning on higher ground, along trading routes or important rivers meant one could see and thus control what happens. Specific landscaping and strategic positioning of outbuildings further strengthened that control. Within the feudal system these places held a certain claim to the productive value of the land. Up until the 20th century production remained the most important economic activity. Large scale foresting and agricultural activities as well as the development of new techniques or the harvesting of raw materials were key in the economic development of many of the European estates. Production had an important significance for the self-sufficiency of these sites as well. Vegetable gardens, vineyards, orchards and the hunting grounds produced, with the help of specific techniques, exclusive foods all year round and the development of the estate was further supported by onsite material and energy production. A last significant link between the landscape and the estates is their recreational and aesthetic value. This is most explicit in the summer residences built throughout Europe

by city dwellers in the 18th to 20th century. It has been however, a significant quality of rural estates throughout history. Key to the identity of rural estates is the notion of 'dulce et utile' which is the intimate pairing of the useful and the pleasurable. They were and continue to be economic and productive entities, while simultaneously also offering room for leisure activities (e.g. hunting and walking) and aesthetic enjoyment of the estate landscapes.

Policy should help to redefine this relationship by stimulating for example the estates to produce ecosystem services or recreational value for the many.

#### From history to future

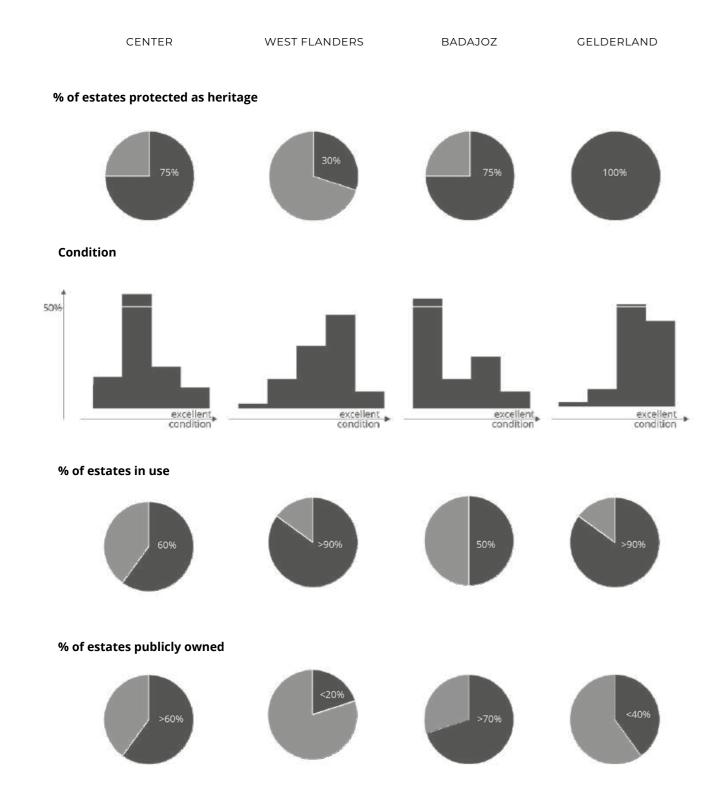
It is clear that not all rural estates survive history and in each region estates which seem to have disappeared still leave their mark on the landscape. In Gelderland a research project identified all the landscapes with estate qualities, resulting in the demarcation of 550 areas. This is twice the number of identified rural estates in the inventory. Although this identification has no legal consequences, it acknowledges the importance of these traces within the landscape. Similarly, the cultural landscape of an existing rural estate which today is fragmented or divided between multiple owners often still has an intact structure or parts of that structure. These traces in the landscape make it possible to read and understand the narrative of the landscape. They form valuable starting points to connect the future development of a region to its history and as such strengthen the identity of a region.



This map of Gelderland developed by Gelders Genootschap and commissioned by the province of Gelderland is showing all regions which have been identified as area's with 'estate qualities'. These qualities are valuable for the future development of the landscape and their identification.

Making them visible to all stakeholders, is a first step.

36 Chapter I.I - analysis

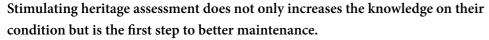




The Castillo de herrera del duque in Badajoz is positioned on a 745m high mountain range overlooking the town. Although conservated and open to the public the castle is in ruinous condition and has no direct economic potential at the moment.

Data collected through the baseline survey based on sample regions and estates. The condition of the rural estates, their use and their ownership varies greatly in between the regions.

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'Monumentsguard' is a membership based NGO in the Netherlands and Belgium. It is a funded NGO offering affordable condition assessment to its members. It is a structural partner within the heritage ecosystem of these regions and funded through heritage policy. After each site visit, advice is given how to maintain the asset. Although the database of the NGO incorporates information on both heritage protected and unprotected sites, it only holds information on the sites who joined to organisation. In Belgium for example the database incorporates only 40% of the protected heritage. This database is however the best way to understand the condition of the heritage assets in these regions.



#### Usage

As is the case for all heritage, the condition of the rural estates depends heavily on its use. The figures above are generally based on the overall condition of the buildings and not the green heritage such as landscaped parks, treelined alleys, orchards and so on. Moreover, the assessment of an estate made up of several buildings is challenging when the different buildings vary greatly in the condition they are in. This difficulty has led to region specific non standardized methods of assessing the condition of these rural estates.

#### **Public and private**

In the Center region and Badajoz the majority of the rural estates are publicly owned. This is amongst other reasons due to national land reform acts from the past. In the Center region this ratio is continuously changing as lawsuits often lead to a restitution returning the property back to the private owner. These processes take a long time and this is leading to poor maintenance of the estates and abandonment in the meantime. In Spain, the national government has put the historical assets on the market for decades already and in urban and coastal regions these sites quickly found a

new owner. In rural areas like Badajoz, this is not the case. Uncertain development possibilities of these sites have led to a low interest, with a large part of the rural estates still publicly owned. Most often these are the most challenging sites such as ruinous castles in difficult locations. In Gelderland and certainly West Flanders most ownership is still mainly private. The transition from private to public ownership is a case by case decision. However, a significant part of the rural estates in West Flanders and Gelderland combine public-private ownership and/or management. In these cases, the building is often privately managed and the green surroundings publicly but of course numerous variations exist.

#### Multifunctional

In all four regions rural estates have always been multifunctional rural entities.

Political, defensive or recreational functions were combined with agricultural, nature, forest, food and cultural production. In the twentieth century this multifunctionality has been under pressure for many different reasons. Large land reform acts have disconnected many of the castles and manor houses from the land around them, expropriation of the buildings



"There is a difference between privately run and more collectively run-ways, every case is unique, and you need to have a unique approach for every site. [Eastnor for example] wants to have events because they bring money and the gentleman from Croft said [they] don't want to have large events".

- Joep de Roo. Eurodite

It is valuable to have a variaty of rural estates in one region with different business plans, approaches and target audiences as this generates a complementarity that is beneficial for the sites itself and the wider region. A government can stimulate or safeguard that variaty.

has realized a rupture in the management of estates, modernization has rapidly altered agricultural production, urbanization has led to the fragmentation of the estates, inheritance laws and taxes have divided larger estates and so on. Often this resulted in a disappearance of this multifunctionality in the second half of the twentieth century. Today diversification in the development of a rural estate is rediscovered as it is related to qualities such as sustainability or resilience or simply because it is the only viable way of covering the costs. Many estates need to reintroduce and even reinvent this interconnectedness. Estates now combine private living quarters with for example tourist accommodation, offices, rental apartments, wedding venues, nature development, land leasing, volunteer work, educational programs, festivals, theatre productions, museums, restaurants, energy production, small scale product development and so on. Because of their inherent multifunctionality rural estates can be the perfect breeding grounds for new cross sectoral approaches and this in the form of living labs.

#### Heritage Value

The heritage value of rural estates is not

easy to assess or compare between the regions. Each region has different methods and ranking systems to determine the heritage value. In the Netherlands it is common to have national and local protections, in the Center region there is a distinction between heritage of national and local importance, in Spain you have a variety of heritage protection systems and in Flanders you have a difference between protected and consolidated heritage. Looking at the protection grade of rural estates within sample areas in the different regions, less than 20% in Badajoz, less than 30% in the Center region or West Flanders and less than 40% in Gelderland receive the highest protection grade. These numbers must be understood as indicative although more detailed research could confirm this and explain for example the large variation between the regions. The high number of rural estates in each region and the small percentage which receives the highest possible protection reveals the existing variation in heritage value. For the largest part of rural estates their heritage value cannot be the only value or even the focus point in their redevelopment. The low percentage of museums within a rural estate (less than 5% in Gelderland, West Flanders and Badajoz) furthermore confirms this.



"How do you resolve that tension between employing a lot of people who really are passionate about old heritage homes and their content, and their historical value, and a public that doesn't share those value? And instead views heritage more as some kind of recreational backdrop? Sometimes the result can be that the house or castle doesn't focus on its historic content at all."

– Alexander Lamont-Bishop, National Trust

#### **CONCLUSION**

Within these four regions a diversity of estates is found in widely varying contexts. Some estates have the potential to be focal points within the region while other estates can support these, together making a varied itinerary. Clusters with higher densities of rural estates creates a variety on a regional scale. In rural areas under urban pressure a better understanding of a rural estates cluster could help safeguard the region from further fragmentation for example. In depopulating regions their identification could create the needed weight to attract investment. The sheer number of rural estates is very valuable from a regional perspective as well and a large number of smaller estates can create a relief for the major tourist attractions and spread tourists more homogeneously within a region. The multifunctional potential of estates further enhances this and furthermore makes them perfect breeding grounds for innovative transversal approaches.

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## 1.3 POLICY INSTRUMENT

Innocastle focuses on four policy instruments influencing the development possibilities of rural estates in the respective regions. These target policy instruments have a focus on heritage or regional development, but they all have different backgrounds, objectives and funding possibilities. At the start of the project exploratory interviews and documents describing the structure of the instrument, the organisational structure and a SWOT-analysis ensured an increased understanding of the target policy instruments.

	I	WEST		
	CENTER	FLANDERS	BADAJOZ	GELDERLAND
Instrument	Regional Operational Programme 2014-2020: Priority 5.1	Flanders Decree of Immovable Heritage	Regional Operational Programme for Extremadura objective 6.3.1	Policy Program culture & heritage 2017-2020
Focus area Regional classification (nuts)	Macroregion one Nuts 1	Flanders Nuts 1	Extremadura Nuts 2	Gelderland Nuts 2
Timeframe	2014-2020	2013 onwards	2014-2020	2017-2020
Focus topic	Development of natural and cultural heritage	Immovable heritage	Valorisation of natural and cultural heritage	Culture and heritage
Focus on rural estates	Indirect as part of the national heritage	Indirect as part of the regional heritage	Indirect as part of the regional heritage	Direct as part of the provincial heritage
Objectives	Restoration of 45 heritage sites	-A unified policy on archaeology -Heritage protection -Installing a cross sectoral and holistic approach -Supporting the heritage community	Increasing tourism to the region with 10% during the program's duration by developing new heritage oriented itineraries.	-Reinforcing functional heritage -Strengthening cooperation -Promoting innovation
Yearly budget	<55.000.000€ (detailed dispersion not specified)	± 100.000.000€	<9.400.000€ (detailed dispersion not specified)	± 20.000.000€

#### **DIFFERENT INSTRUMENTS**

The four instruments represent a different approach to heritage. In West Flanders the targeted policy instrument is the framework instrument of the heritage policy for Flanders, covering everything from the protection methodology to the connection with other sectors as well as the monitoring methods. In Gelderland the targeted policy instrument can be understood as a provincial supplement to the national heritage policy. As such it does not deal explicitly with protection issues but it follows the boundaries set by the national heritage policy. It is a tailored four-year program intended to strengthen the heritage

in the province. The program is developed and set in close proximity to those stakeholders who are eventually impacted by the program. In Badajoz and the Center region the target instruments are connected to the European Regional Development Fund (ERDF), a top down instrument with a development oriented approach towards heritage. They do not originate out of the heritage sector and have no specific protection oriented approach. In the program, heritage is seen as a valuable asset for the development of the region and this from a national and even a European perspective.

# SOME RELEVANT QUESTIONS WHEN DEVELOPING FUNDING INSTRU-MENTS.

- Is it valuable to make funding possible for all aspects of the redevelopment process of a rural estate such as funding for the research into the redevelopment possibilities, the design process, the execution of the works, the yearly maintenance, the management plan and so on?
- Is it better to focus funding on the protected elements or on the whole estate?
- Is it good to differentiate the funding in relation to the type of owner and/or the financial capacity of the owner?
- Is it good to differentiate the funding in relation to the intended use or the value a community attaches to a site.
- Is it best to fund some estates for all their costs or all estates for some of their costs?
   estates and what then would be the criteria to select?

# FRAMEWORK VERSUS INVESTMENT APPROACH

These different backgrounds and objectives impact how each policy instrument approaches and supports the heritage owner or manager in the many aspects related to the management of a site. The instruments in West Flanders and Gelderland try to create a context in which heritage can hopefully flourish by introducing a variety of supporting measures such as restoration funding, support for structural partners, the execution of research leading to new insights or by introducing fiscal measures and specific loan formulas for example. The Flanders Decree of Immovable Heritage incorporates restrictive measures to safeguard heritage and intervene when necessary as well. Although more than 70% of the available budget of these instruments is still spent on the direct funding of restoration works, a part is thus spent on installing this stimulating context for heritage. Both are typical sectoral instruments and although a transversal approach is up to a certain point already inscribed in the instruments,

it is not the central idea. As rural estates are inherently cross sectoral, this sometimes leads to conflicts with other instruments. The instruments in Badajoz and Center region have direct quantitative objectives and are focused on punctual interventions such as the development of a specific number of heritage itineraries respectively a specific number of restorations. This is an efficient way of investing in a certain region which plugs into the existing policy frameworks. This is as well its largest downside as the success of these focused interventions depends on the match between the investing instrument, the framework and the local context and target groups. As such the efficiency of the method does not guarantee its effectiveness. Moreover in the case of Romania, the lack of a cross-sectoral approach leads to poor understanding of the heritage needs and destruction of values by poor quality interventions. In order to fully achieve their goals these projects need a good contextualization by involving multiple and varied local actors for example. In Badajoz the 'local action groups' are the main structure responsible for this contextualization for example.

#### PROJECTS FUNDED

#### **Listed heritage**

Three out of the four policy instruments use the list of heritage protected sites as the first selection criterion to identify the sites which possibly qualify for support. This can be the national list, regional list and local lists or a combination. In Gelderland for example both national protected sites as well as local protected sites qualify for support within the Policy Program culture & heritage 2017-2020. When this list uses subdivisions in the possible protection status a site can receive, this often translates as well to a difference in the support a site can get. This can be a good method to diversify governmental efforts in relation to the heritage value of a site. At the same time this can strengthen the already existing difference between sites which are not necessarily valued differently by the local community.

#### **Legal status**

Besides the heritage value, some instruments also use the legal status of the owner as a criterion for admission towards funding channels. In Romania for example a hard distinction is made between natural entities and legal entities. The first category is excluded from funding. In the other instruments similar distinctions between private and public owner have only minor influences on the

funding possibilities for the respective site. This distinction is strange as the legal status of the owner only indirectly influences the value a site can have for society. It could be more effective to focus on the capacities and objectives of the owner instead. Owners with a limited financial capacity but a strong community oriented development plan could receive more support for example.

#### Value for society

The understanding of heritage by society is constantly evolving as for example indicated in the text 'Heritage as a sector, factor and vector'. Supporting this evolution as a government by engaging in the public debate and adapting policy instruments to that debate increases the public support of heritage. Diversifying governmental support to fit society's different understandings and approaches to heritage is a valuable strategy. Some instruments already take this into account by means of using easily identifiable criteria such as full public accessibility or the exclusion of economically exploited sites. This eliminates a lot of sites as much more informal and nuanced aspects play a role in the value a site can have for society. In order to stimulate owners to activate the societal potential of their rural estate, it will be necessary to develop new methods which make this more explicit.



HOW WE AS A SOCIETY UNDERSTAND AND APPROACH HERITAGE IS CONTINUOUSLY EVOLVING. HERITAGE POLICY SHOULD STIMULATE DISCUSSION IN ORDER TO INCREASE THE QUALITY OF THAT EVOLUTION

AND ADAPT TO THE OUTCOME OF IT. J. Janssen, E. Luiten, H. Renes & E. Stegmeijer describe in their text 'heritage as sector, factor and vector' societies evolving understanding of heritage. This changing understanding has led to three approaches to heritage which now coexist. The oldest approach is valuing heritage for the intrinsic qualities it has. It is an institutionalised approach which preserves and protects isolated objects. A second approach is more contextualised and values heritage for its spatial qualities. The interest of the heritage sector in cultural landscapes as well as the presence of heritage in the redevelopment of industrial neighbourhoods can be linked to this approach for example. A last approach understands the value of heritage as socially debated. It is a process oriented approach based on co-creation and co-ownership. Instead of the intrinsic or spatial qualities, heritage is valued for the meaning and identity it generates in place-making processes.

© Joks Janssen, Eric Luiten, Hans Renes & Eva Stegmeijer (2017) Heritage as sector, factor and vector: conceptualizing the shifting relationship between heritage management and spatial planning, European Planning Studies, 25:9, 1654-1672

RURAL ESTATES

ARE PARTICULARLY

MAINTENANCE HEAVY

AND THIS IS EVEN

MORE SO WHEN GREEN

HERITAGE IS INVOLVED.

Social cost benefit analyses reveal that

Social cost benefit analyses reveal that high direct costs for the owner are accompanied by high indirect benefits for the local area. Supporting these sites in their maintenance ensures a prolonged good condition and strengthens their direct as well as their indirect benefits.

#### MANNER OF FUNDING

#### Part of the project funded?

All instruments fund development projects. How they do this, for what aspects of the process and what percentage of the works is funded varies from instrument to instrument. A site can receive support for the research towards a redevelopment project, the development of the project, the physical execution of the project and the recurring maintenance afterwards. Through direct funding, fiscal measures, heritage loans and advice. There is a large variety in the percentage of the costs being funded. In Badajoz and Center region this is close to 100% while in West Flanders and Gelderland the percentage funded starts at 40% and in exceptional cases can go up to 80% depending on the type of work, the type of owner, the use of the site as well as when proper maintenance is proven.

# Transversal restoration or heritage elements.

When a certain site is eligible for heritage funding it does not automatically imply all aspects of that site are eligible. The four policy instruments each deal with this differently. Two contrasting methods can be identified. A first method is to fund all the works executed during an approved restoration process. This includes both works directly linked to the heritage elements of the site as well as more contemporary measures such as technical installations or contemporary window frames when the existing ones cannot be salvaged for example. This logic stems amongst others from the idea that contemporary works such as these all support the continued survival of the site. Executing works on a heritage site moreover

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requires more care, preparation and technicality and will thus come with a higher cost compared to a normal construction site. Because the funding includes all construction elements, the project needs to be evaluated and monitored in its totality. This hopefully ensures an increased quality for the project as a whole.

The second method is to focus the funding on the works directly relating to the heritage elements as described in the documents for the protection of the site. One estate could in this case receive funding for works on the protected windows of the castle but not on the roof which has no heritage value for example. This is a very efficient way of funding certainly when confronted with sites and buildings which only have a fragmented heritage value. It moreover disconnects somehow personal choices of private investors from the funding instruments. Discussions if a home automation system is or is not needed to manage and preserve a heritage

site, for example, are avoided because no funding is allocated to these works. As such, the people evaluating the funding applications can more easily fall back on the knowledge within the heritage sector and do not need to qualitatively evaluate all the design choices made within the project.

Both methods represent an extreme and it is obvious that the application requirements and surrounding policy framework have a large influence on the possible benefits or dangers of these two approaches. It is clear that both methods can be executed with similar budgets as the amount of funded works can be evened out by adapting the funding percentage. How each instrument is positioned in between these two extremes is thus a policy decision. Moreover, one should notice that rural estates are complex sites which benefit from a holistic approach. Isolating the protected heritage elements within a redevelopment process fragments decision

making as well as the execution of the works. It is for example imaginable that the protected part of a landscaped garden will receive another treatment because it has to follow more elaborate administrative and technical requirements. This can lead to a fragmented end result and needs to be countered by an integral approach of the owner, manager, designer and a contextualized evaluation of the funding institution.

#### **Funding processes**

All policy instruments require some sort of application dossier in order to receive funding. The preparation of this dossier is often described as challenging and expensive and it follows strict steps which structure the redevelopment project. It requires detailed planning and a long term vision. Such an application dossier fits a classic redevelopment project perfectly. However, complex or hard to develop sites or bottom-up

initiatives do not follow this standard procedure. They rely more on a hands on approach with volunteers and have a more experimental nature. This 'redevelopment by doing' however has its own value as it is always supported by the community, has a distinct character and is often a breeding ground for new approaches. Although these types of projects are no longer the exception, they still miss out on heritage funding within the target policy instruments for a number of reasons. There is a gap between these new development methods and current heritage funding and as such they often fall back on funding channels in the social sector or the broader cultural sector. A better connection of these projects to the policy instruments would increase the professional support and result in higher restoration qualities.



"Hay Castle was very inspiring as it showed the power of seizing the moment and creating a good, diverse and determined group of people that drive the transformation process. A lawyer, a financial person and a good manager is all you need. And luck with finding financers and with subsidy applications."

- Joep de Roo, Eurodite

Hay castle received funding from the National Lottery Heritage Fund which amongst others focusses on comunity oriented heritage redevelopments.



"For governments, heritage care is much more than just making grants and ensuring heritage is looked after – it's also about benefit to society. [...] That means that the assistance we give has to support the social component as well, not just the heritage or commercial elements."

- Serge Defresne, Flanders Heritage Agency

To activate the full potential of a heritage site, heritage policy needs to take into consideration the heritage, economic and social value of a site. This means that these three elements need to find their way in all aspects of heritage policy, such as the criteria towards protection and funding.

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#### **SWOT-ANALYSIS**

The different SWOT-analyses of each partner are of course linked to the specific objectives and characteristics of each policy instrument. As such it is difficult to develop a shared SWOT-analysis. Some elements described within the SWOT-analysis of one region however are recognizable for other partners and a lot of the different topics have been discussed during the multiple learning events of the Innocastle-project. As such it is possible to discern certain overarching themes and challenges shared by the different regions.

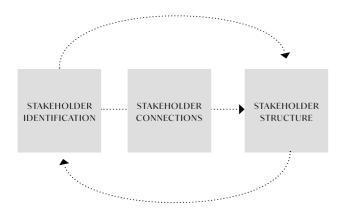
- Society's interest in heritage and how it understands heritage is evolving positively in the four regions. Rural estates are often supported by numerous civil society organisations and are part of social media campaigns. The direct and indirect economic value of a rural estate is recognized more and more in each region as well as the future oriented potential of these sites to deal with depopulation, urban pressure, sustainability, climate challenges and so forth. While this is a positive evolution, it is also a challenge for the heritage sector as the boundaries in which it operates become more and more fluid. A certain tension can exist between the societal understanding of heritage and how the different policy instruments are organised.
- An active cooperation between the different sectors and stakeholders is the most effective approach for rural estates, as well as for the landscape in general. While this is understood by most stakeholders a transversal method remains difficult to install. It demands a shift away from the standard sectoral approach and requires an extra and continuous effort. As the different sectors and actors interact differently on each rural estate a more tailored approach is needed. This is particularly challenging as it requires everybody to participate in a case by case debate instead of remaining within the safety of their sectoral context. All Innocastle partners acknowledge that trust between the stakeholders is crucial.

- Ensuring the quality of redevelopment processes or specific conservation works is a challenge and needs constant attention in all regions. Governmental support towards all aspects of rural estate ownership as well as an integrated approach across sectors is indicated as valuable for this. In all regions it is noted as well that good craftsmen are disappearing.
- In all regions rural estates vary greatly in their condition as well as in the development potential they have. Adapting policy to that variety is not easy. A heterogeneous approach which treats all sites identically, such as a national heritage policy or ERDF instrument, is best supplemented with a local approach focused on a specific cluster for example. To realise this, it is necessary to distribute the different competences in relation to heritage across policy levels and create an environment in which knowledge is shared and cooperation stimulated between the different levels.

## <sup>1,4</sup> STAKEHOLDERS

The involvement of stakeholders is one of the most important aspects of Innocastle. In each region general stakeholder meetings have been combined with close cooperation on learning case level and participation in study visits. According to the principle of the quadruple helix, different types of stakeholders have been approached within the project such as owners, non-profit organisations, local and national policy-makers, experts, SMEs and so on.

Although most of the partners had a good understanding of their stakeholder field already, a trajectory was stipulated to map and understand this better in each region.



#### **Iterative process**

In three steps, the objective was to identify the different stakeholders within the field, to understand the connections between the stakeholders and to understand the structure of the stakeholder field. It is an iterative process throughout the whole project, with the workshop during the partner meeting in February 2019 as a major step. This workshop started with an explanation by Emma Thompson of the National Trust in which she guided us through her approach to engaging stakeholders in the different steps of a project. In the workshop part itself each partner started a discussion between colleagues on the previously identified stakeholders with the help of two templates. A first template collected the stakeholders in

relation to the level (national, regional, local) in which they were active and was used to visualise the connections between the stakeholders as well. The power interest matrix was the second template used to reveal how each partner understands the involvement of the different actors. This hands-on workshop led to the conclusion that stakeholder mapping benefits from a visual and dynamic approach. It is an ongoing instrument in our work and evolves continuously during the project. Digitising these maps by using specific software as an effort to perfectly capture the field of actors appeared too complex. It would moreover focus on one specific moment in time and not do justice to the dynamic quality of the stakeholder field.



The stakeholdermapping workshop during the partner meeting in February 2019 helped all the partners to understand better the field of stakeholders as well as how to operate within that field.

#### Different forms of involvement

Because the different policy instruments do not specifically target rural estates, the field of stakeholders mostly exists of actors only indirectly connected to rural estates. Most of them are connected to a specific sector and their relevance for rural estates depends on the level of importance of their respective sector for rural estates. Showing to these sectors the potential of these domains for their objectives will be key to animate the interest of a specific stakeholder to support future development of rural estates. Owners and managers have an indirect influence on the policy instrument by joining interest groups and other organisations. Each region has at least one strong non-profit organisation directly defending the interests of rural estate

owners and managers on a larger scale. This is fairly unique in relation to other heritage types and is only matched by religious heritage. Other non-profit organisations focus on certain aspects of rural estates such as their heritage, nature, forests, agricultural or cultural elements.

The historical link owners have with the rural estate they own as well as how they are using and developing it varies tremendously. The type of link the different rural estates have to the target instruments is influenced as well by their protection grade for example. As such it is good to understand that it is somewhat misleading to talk about 'the owners' as one stakeholder category. It could be worthwhile to get a better understanding of the different types

of owners in each region when working towards increased engagement. Obvious distinctions such as private owner versus public owner, privately versus publicly accessible estate, an estate run as a business versus one managed as a family house, heritage protected versus not protected and so forth can be supplemented with less obvious distinctions such as the social engagement of the owner. Similarly, many private actors refer to 'the government' as a stakeholder while they actually refer to one specific level or agency.

#### Past experience, future cooperation

In some regions important historical events which created a sudden rupture in rural estate management decades ago, still influences how the different actors interact today. In other situation a rural estate is passed on from generation to generation and experience in cooperation is passed on together with it. History colours how the different stakeholders interact today and acknowledging this influence is important. The stakeholder meetings executed during the project have proven tremendously valuable as a first step to increase the mutual understanding and trust between the different stakeholders. Continuing these meetings would be valuable. The province of Gelderland has for example already been actively engaging the different actors involved in rural estates for 13 years with the help of Gelders Genootschap amongst others. This is now resulting in cooperation between municipalities, the province, rural estate owners and non-profit organisations. Stimulating new cooperation between public and private actors can be a next step in acknowledging the past but looking to the future.



"The fact that there are associations or groups of people that do advocacy and lobby for historic houses, for owners, you need people that help you for this, to work with a government and so on."

- Irina Leca, Arche Association

"The idea of how to manage between different stakeholders demonstrated throughout the project is very impressive. No government can handle cultural heritage alone and they need to be open for cooperation."

– Catherine Leonard, National Trust

"I think today we already made a change, we were talking about it with stakeholders. It wasn't easy to do but we had the right people. We had to have, all of us, a lot of patience. But it has been, maybe, hopefully a turning point"

- Patricia Mora, Gestiona Global

Innocastle's approach based on the integrative quadruple helix structure proved that bringing together a multitude of stakeholders to share knowledge and create understanding is the only sustainable solution to safeguard these complex sites.

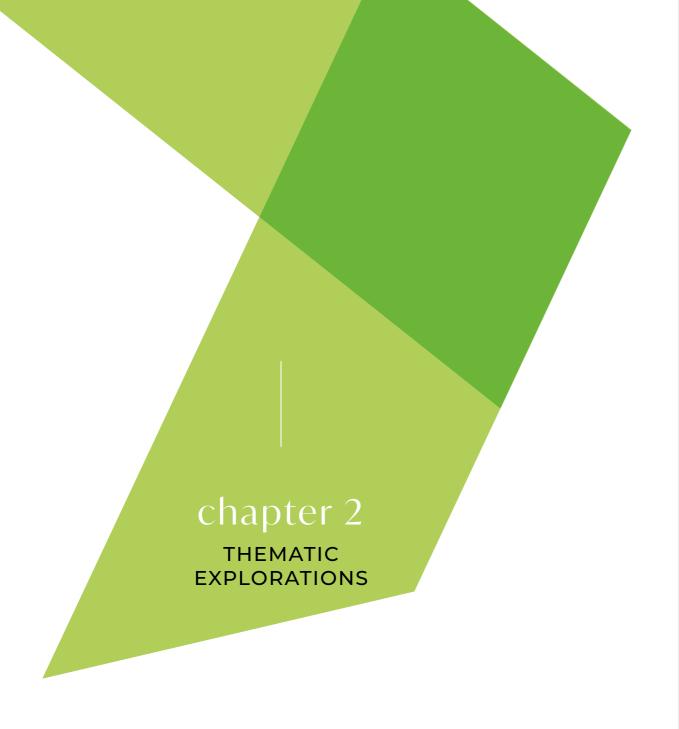












In this chapter three central themes are explored: 'governance & partnerships', 'economic development' and 'promotion & visibility'. Each theme starts with a triggering SWOT-analysis to then reflect on good practices and challenges related to the theme.

Together with the previous chapter, this forms part I of the document which is a search towards common ground on the characteristics, the challenges and opportunities of rural estates in the different regions. This search uses the data collected within the different regions (part III) and is complemented with knowledge gathered during the study visits, the different partner meetings and existing literature and studies.

In part II of this document, the common ground is found by developing shared characteristics and policy recommendations.

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## <sup>2.1</sup> GOVERNANCE & PARTNERSHIPS

STRENGTH	WEAKNESS	OPPORTUNITY	THREAT
Rural estates are large entities which facilitate and stimulate on site cooperation. They can form controlled environments to explore new partnerships across sectors.	Rural estates are too large and complex to be easily managed and maintained by one party.	Rural estates have a strong local importance. Local governments and other stakeholders often want to get involved.	The general public attaches certain connotations to rural estates which do not always stimulate cooperation.
Rural estates are historically connected to regional development and still have that potential today.	The land historically connected to the estates is under pressure or is now disconnected	Regional development is inherently cross sectoral. Rural estates can benefit from this approach.	Spatial fragmentation, rural depopulation, climate change, have a large impact on rural estates.
Activating the potential of rural estates is a shared responsibility between different stakeholders and sectors. The need for cooperation is therefore made explicit.		Cross sectoral governance is gaining significance and is promoted by the European Union.	Working together needs continued engagement and extra efforts by all actors.

#### **GOVERNANCE**

There are a multitude of laws which have an influence on the preservation, transformation and exploitation of rural estates. Laws connected to heritage, intangible heritage, cultural goods, nature development, inheritance, spatial planning, tourism, agriculture, rental, taxes and so forth create the policy context in which rural estates operate. Often these policy instruments and laws do not directly target rural estates and are sector specific. As such they only influence a part of the estate. Exceptions exist of course

and the 'Nature Beauty Law' in the Netherlands is an example which specifically targets rural estates. Sometimes different ministries are responsible for one instrument or a cooperation between ministries is needed but not existing. In Romania, for example the Ministry of Culture is responsible for national and smaller European financial instruments, while its impact on the European development funds invested in heritage is minimal.

#### Complexity

Efforts are continuously made to harmonise the different instruments and nature conservation, heritage & spatial planning are the three most obvious sectors for rural estates in which policy is becoming more and more adapted to each other. In all regions it is however made clear that the existing policy context is complex and that conflicts between instruments still exist. Although not intended, this creates a certain restrictive environment and complicates the development of a rural estate. Professional help in the form of an estate manager, architect, lawyer, accountant or notary is needed to fluently operate within the policy context or understand the different tax measures. Not all estates have that ability however.

#### Changing understanding of heritage

Our understanding of heritage is becoming more fluid, dynamic, nonlinear, transversal and community oriented. This leads to a variety of different projects ranging from classical restoration projects to grassroots initiatives which mainly focus on community building for example. Policy institutions should answer to this changing understanding by transforming the policy context from a restrictive context to a stimulative context. This stimulative context could be developed as a toolbox that can be used by the different initiatives to help realize the ambitions they have.



"Creating meaning for heritage and make it more relevant is about finding new creative ways of bringing different people into historic houses and landscapes. Creating memories through experience is very important. It's also important to become more open for the community."

- Lucia Leca, National Institute of Heritage

Public policy should not only focus on the intrinsic heritage aspects of a site, but should stimulate to use the potential of heritage in creating authentic experiences and places of meaning for the community as well.

64 CHAPTER I.II - THEMATIC EXPLORATIONS









# Policy instruments specifically targeting rural estates are rare. They however can connect rural estates to specific societal challenges and create a win-win.

The 'Nature Beauty Law' is a good practice from the Netherlands that makes a connection between rural estates and nature conservation. After the first world war many rural estates were struggling to survive and the first elements to disappear on these domains were the natural assets and forests. In order to safeguard rural estates and their nature, fiscal stimuli were introduced in return for specific measures. The idea was that a flourishing rural estate would ensure a qualitative and prolonged private nature management amongst others. This law has many benefits and one of them is the introduction of the word 'rural estate' (landgoed) in the legal system of the Netherlands. A second benefit is that it supported a culture of public interaction on rural estates. Extra stimuli were given to estates which realised public accessible walking trails. From 1928 onwards a public culture has developed around the term 'estate' and this helped to realise the good condition and public interaction on the many rural estates today.



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#### REGIONAL COOPERATION

Rural estates are ideal sites to initiate and stimulate regional cooperation because their value and influence extends beyond the site itself and even its wider setting. They are moreover pressured by contemporary urbanization processes which create fragmentation or climatic changes. The learning case of the 'estate zone Baakse Beek' in Gelderland is for example looking into and supporting the cooperation between the regional water authority and different estate owners in the region to solve specific climate related water management challenges. They are exploring how the cultural landscapes of the estates can be used to solve these water issues and at the same time strengthen their unique historical qualities. The learning case 'Teleki Triangle' in Center region is looking in depth at how certain elements of the fragmentation of three former estates can be reversed in order to increase the touristic and

landscape qualities of the area. A cooperation is needed between the three municipalities and the many different owners of the former estate grounds. The Alburquerque castle in Badajoz has been redeveloped into an exclusive hotel but exploitation remains up until this moment non-existent because a feasible public-private partnership has not yet been found. Connecting the exploitation of this unique site to the further development of the municipality and the touristic development of the region could provide the needed environment for a successful exploitation. Many more examples exist in which the challenges of rural estates can be connected to challenges on a regional scale to create winwin situations. New ways of cooperation need to be explored for all these cases and a regional government can be the right partner to facilitate or initiate new forms of cooperation in which the different actors become equal partners.



"I realized that there are similarities in challenges being felt across Europe .... how important partnership working is to achieving sustainable future. I want to do more to support our local and regional government and also our neighbours. To have our aims and those of the local region come together."

- Emma Thompson, National Trust



"Being a civil servant in a regional authority, I was thinking what the relation with the private sector should be? For example the parador is state owned and exploited in a certain way. It's completely unfamiliar for us. But these things make you think about what should be the right balance between state influence and entrepreneurship".

- Paul Thissen, Province of Gelderland.

'Paradores de Turismo de España' is a state run hotel chain in Spain. Most of its hotels are located in unique heritage sites such as castles, haciendas, cloisters and so forth. 95 Paradores exist across Spain and showcase the Spanish heritage, increase tourist infrastructure and stimulate regional economy.

#### **PARTNERSHIPS**

Rural estates are large multifunctional sites and often a partnership is needed to create a feasible future. This can be a partnership between public entities, private entities or a mixture. In West Flanders and Gelderland all sorts of partnerships can be found, from a municipality who organises occasional guided tours on a private estate to nature development and public accessibility in exchange for tax exemption or structural funding to the private management of a publicly owned estate through acquiring an operating license. In Badajoz and the Center region the political climate in the past did not facilitate partnerships between private and public actors and up till today this seems to have an influence on public-private interactions. In the Center region for example natural persons owning heritage sites have a

lot of difficulties accessing European funding through the Regional Operational Programme 2014-2020: Priority 5.1 due to the eligibility criteria. In both regions a rural estate is either owned and managed privately or owned and managed publically. The Paradores networks is for example a chain of state run hotels in Spain mostly located in heritage sites.

Engaging in a public-private partnership to develop a rural estate needs trust between the governmental institutions and private owners. This trust is not a given in the four different regions. Networks between the different stakeholders of a region as well as good examples of new partnerships can create knowledge and experience boosting the trust to work together.

69 CHAPTER I.II - THEMATIC EXPLORATIONS

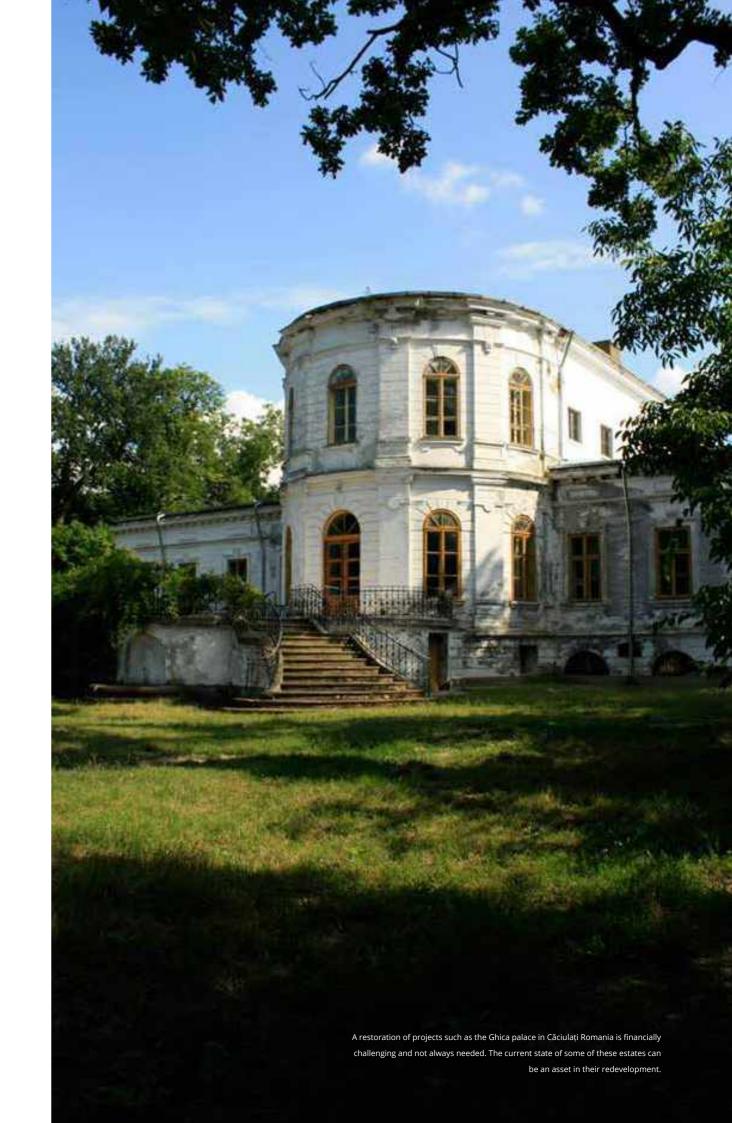


'Research by design' can generate new and innovative insights into rural estates and their relation with the region. Researchers of TU-Delft developed this map of rural estate 'De Wierse' in which they explore the adaptive possibilities of the existing design to create a climate proof water management on the estate and its wider region. The image drafted by students of UCG-KASK tentatively visualizes their proposal to transform the landscape park Bulskampveld into a climate park. This project proposes development strategies for the different estates in the region. While some can become gates to the region others are in the midst of a rewilding zone and will slowly transform into mysterious ruins in the landscape.

# <sup>2.2</sup> ECONOMIC DEVELOPMENT

STRENGTH	WEAKNESS	OPPORTUNITY	THREAT
Rural estates have multiple values influencing different sectors and stakeholders outside their borders	The direct costs for the owner or manager are not necessarily followed by equal direct benefits.	The indirect benefits of rural estates are more and more indicated through specific research	The instruments to make explicit the indirect societal benefits of rural estates are easily questioned
The inherent multifunctionality of rural estates makes them unique and creates resilience to market fluctuations	It is difficult to align all aspects of a domain in order to create an economic feasible mix with respect for the estates history.	Multifunctionality and interconnectedness are understood as qualities to strive for.	Laws, taxation and subsidy systems remain mainly sector oriented
Rural estates have always been productive centres and reactivating this productivity will strengthen their economic potential	The economic potential of these products does not always match the high costs of rural estates	The sustainable development goals of the UN and the idea's behind the 'purpose economy' match the potential qualities of production on rural estates.	The different laws and protection statutes sometimes hinder development.

**'PRESERVATION** THROUGH DEVELOPMENT' IS A CONCEPT INTRODUCED IN THE BELVEDERE NOTA IN THE NETHERLANDS IN WHICH THE HISTORICAL NARRATIVES OF A PLACE HELP TO GUIDE FUTURE **DEVELOPMENT.** Immaterial continuity is the vector along which material change can enfold. As such all events which happen at a certain site have their value for its future development.



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### REDEVELOPMENT PROCESS

The redevelopment of a rural estate is financially challenging. Looking at the heavily altered Ghica palace of Căciulați in Romania, the ruinous state of many castles in the province of Badajoz or some of the estates in West Flanders and Gelderland, it is imaginable that a full restoration is not always the most feasible option. Understanding the specific qualities of a site and the potential of these qualities for the redevelopment of the rural estate will result in a more nuanced look to the site and the historical events that shaped its current condition. A redevelopment starting from these qualities can result in a more financially feasible redevelopment and a unique site as result. Rural estate Herrenhaus Vogelsang in Germany for example uses the derelict state of the estate as an asset to attract a specific type of events. Rural estate Heers in Belgium uses the park to organize events which slowly attract the attention to collect the needed funds to restore the castle itself. Castillo de Luna is another

example revealing the need to find harmony between the qualities of the site and present day redevelopment. The castle is positioned on top a large rock formation and entering the castle is a whole undertaking which adds a certain experience to the site visit. Redevelopments which need to be easily accessible are not only expensive and hard to realize, they will also destroy a part of the uniqueness of this place.

At the same time, some sites that apply for funding receive a full restoration budget without having a feasible or community supportive exploitation strategy. Connecting realistic business plans to funding or supporting these sites to use the redevelopment process as a way to experiment and gain knowledge on possible future uses could avoid loss making sites without community benefits.



"How can we use the parks for our communities? The estates in Romania have a lot of parks as well, but they are not used at all. It would be interesting to explore how to actually make money out of the parks in order to maintain the buildings."

- Irina Leca, Arché Association.

### FINDING THE BALANCE

Most estates in Gelderland have the historical diversification still at the centre of the exploitation strategy. Estates such as Middachten or De Wierse combine for example private functions and living quarters with tourist accommodation, public accessibility, nature and land development, heritage development, volunteering and community work. This creates unique possibilities as tourists staying in a renovated outbuilding can experience the agricultural production or forest management on the estate for example. New interventions and functions must find the right balance within that multifunctional system. The Eastnor castle near the Welsh border for example has a long history as a venue for wedding parties, film shootings, off road driving, business events and

so forth. The castle and surrounding grounds are continuously adapted to better fit the needs of the exploitation and this sometimes conflicts with the nature and heritage values on the estate. In Badajoz an owner, in search of the needed revenue to safeguard the estate just recently started a cooperation with an event firm which can now use the estate for weddings. While this cooperation is fruitful it requires a balance between the different users of the castle. Indeed, it is not always easy to align the privacy of the owner with a newly introduced public function, nature preservation with a successful outdoor event or heritage preservation with the need for new construction or parking facilities.

"BUILDINGS CHANGE, THIS
IS THEIR LIFE AND THEIR
STRENGTH. BY PROTECTING
A BUILDING WE HAVE THE
OBJECTIVE TO ELEVATE THE
AMBITION LEVEL FOR THAT
CHANGE."

Flemish Government Architect Leo van den Broeck explains his view on heritage protection. Development is positive and should be stimulated. By protecting an estate we make explicit its value and demand of all stakeholders, ranging from owner to visitor to government, in increased effort to raise their ambition and make of that change a success.



The Hex estate in Flanders is best known for its Garden and Plant shows in June and September. They bring together exhibitors, experts, specialist growers, professionals and amateurs and attract more than 10.000 visitors.



"The balance between 'the duty of care' and 'business aspects'. Every country estate, every owner is different. There is not one solution, but we can learn from each other. Business diversification within a historic house and landscape is a continuous challenge."

– Elyze Storms-Smeets, Gelders Genootschap



As part of the Innocastle Study visit Catherine Leonard, National Trust, made several cartoons revealing the good practices shown during the visit. Visiteering, shown here, is an example which engages the visitors of an estate as the caretakers of the day.

### A DIFFERENT TYPE OF PROGRAMMING

At the National Trust property Croft castle & parkland as well as Powis castle on the Welsh border, small changes to the programming and product development have made a tremendous difference in the experience of the visitor. Visitors are invited to help maintain the estate, work in the garden or help pick fruits and this within the time span of a regular visit. This fruit is used to produce jam that is being sold on site. All standard products within the shop have been replaced by locally produced goods. The museum exhibition with a focus on the 1939 boarding school recreates choir practice and opens up all the hidden corners of the castle. Places such as the attic where the children slept and the basement have had no adaptions since 1939 and are open to the public without major alterations. It is a backstage look both into the past as into the current working of the castle. Volunteering is organised in a flexible manner and people can help once a week; once a month, during holidays, at special events and so on. In Romania, summer schools are used to teach

restoration techniques on site and voluntourism creates a unique combination of learning craftsmanship in a vacation setting. Similarly, in Castillo de Medellin in Badajoz the restoration project successfully involved unemployed people. Learning by doing is beneficial for the different participants as well as for the sites which see the work slowly progressing. At the Beauvoorde castle in West Flanders artists can stay at the estate if they are working on a project connected to the region and history of the place. Slowly this locally created artistic production will develop new meaning for the region. In all these examples the focus is not on showing the estate but experiencing it and helping it survive.

'DISNEYFICATION' OF RURAL ESTATES
POINTS TO THE USE OF SIMPLIFIED
IMAGERY AS WELL AS TO THE
LOSS OF UNICITY BY LARGE SCALE
DEVELOPMENT OF A SITE TO ATTRACT
LARGER AUDIENCES AND BE MORE
EFFICIENT. 'Authenticity' could be described as the
opposite. It is not only about showing the rural estate but

much more about creating the environment to experience it.



"I found it really refreshing that the focus was on local communities, people living around the monument. Normally you see the same type of tourism products, those that are aimed at people who are new visitors or touring the area. The Trust's focus on people that live close by is really interesting and requires you to change the programming all the time."

– Alina Tomescu, Eurodite





### <sup>2,3</sup> PROMOTION AND VISIBILITY

STRENGTH	WEAKNESS	OPPORTUNITY	THREAT
The iconic buildings of rural estates are widely valued and trigger curiosity.	The main focus on the building is connected to a false image of the past and ignores many other aspects.	People connect to unique family narratives	Not all levels of society connect to rural estates
The relational value of rural estates can be high and local communities often want to get involved.	Approaching a public or private owner of a rural estate is not always easy for a local community.	Bottom up initiatives, participation, co-creation, are gaining significance and valued for their promotional capacity.	Traditional heritage funding is not adapted to bottom up and co- creative processes.
Rural estates can play an important role for the identity of a region because of their strong appearance & large number.	The multiplicity of estate owners can hinder a shared development.	The multiplicity of estate owners can hinder a shared development.	The impact of rural estates on the wider region (spatial and cultural) is often not known.



### 'What if the period of significance is now?'

– Catherine Leonard, National Trust

During a debate on the history of rural estates and how this influences their future, it was noted that we often do not understand the power of what we can do today. Engaged with the narratives & places of the past and concerned to pass them on to the future, we sometimes forget to root them in the world of today and develop narratives of our own.



'Historic Houses', an association of privately owned historic houses in the UK with 1650 members, has a campaign called 'invitation to view' that gives access to private houses which are normally closed to the public. 'Home is where the history is' is a similar slogan referring to the value we attach to the narratives of private historic houses.

### NARRATIVES

Rural estates are the landscapes of past power and in many ways they are still perceived as such. This is positive because it creates a certain curiosity towards these places. Many people are attracted by narratives which immerse them in the life of ancient nobility or the defensive logic (of the Alburquerque castle in Badajoz for example). Rural estates which are generally closed to the public attract numerous visitors when occasionally opening the doors to show the life behind the gates. This connotation however can also hinder development as public support to these houses of nobility is not always a given as the image of wealth and power sometimes hinders cooperation and understanding.

In other situations rural estates can

be connected to events carrying negative connotations. During the communist era in Romania for example, numerous estates have been used as sanatoriums or orphanages and are still remembered as such. Young people are however less influenced by the recent history of these places and look more unbiased to their qualities. They are keen on developing and promoting rural estates. Triggered by the romantic quality of many of the ruinous places, they are setting up social media campaigns, summer schools, festivals, events, and so forth. This has already resulted in positive results in the heritage barometer within the country showing an increased interest amongst young people. Young people are the solution and the creation of their own narratives transforms the rural estates from places of the past to places of today.

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### JOIN FORCES

Joining forces in the promotion of rural estates through a shared event or platform works well and many different examples exist. In Badajoz the classical theatre festival of Mérida organises events in different historical locations in the region of which the castle of Medellin is one. In West Flanders the regional tourist office Westtoer has organised the year of the castles and abbeys in which estate owners were stimulated to organise an event within the framework set by the organisation. Westtoer helped interested owners find the right event for their estate. For numerous estate owners it was a first-time event functioning as a testing ground. In Romania, Covasna County has created a network joining the many manors in its region. The promotion of the region is amongst other things done by giving the

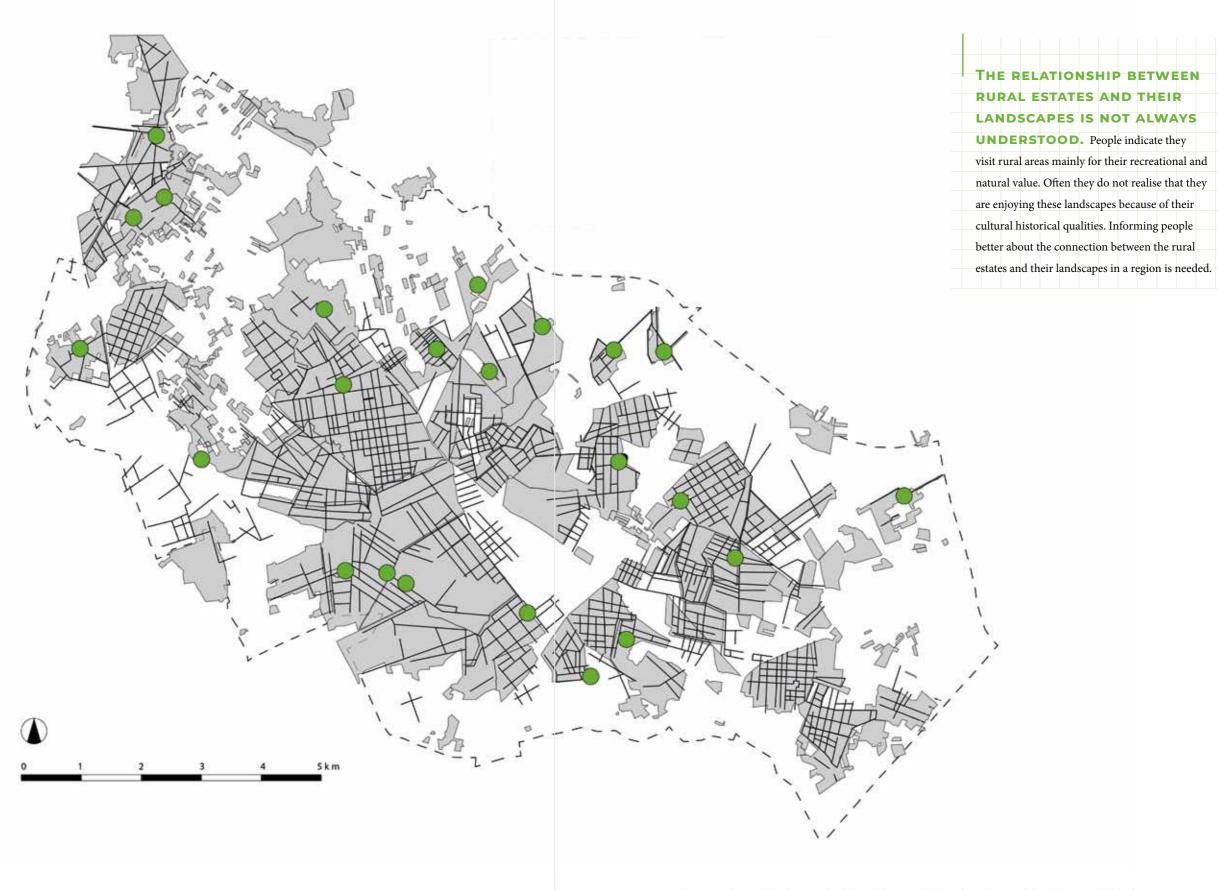
individual sites a shared platform in which they show their qualities. Gelderland is approaching rural estates as the gateways to the region's heritage and nature. Supporting and promoting the many public and private estates in the region of 'Gelders Arcadië' fits within the strategy to develop the region. In Flanders, the project 'Van Steen tot Steen' takes a similar approach. By developing several castles along the river Scheldt between Ghent and Antwerp the goal is to attract tourists into the rural region amid two major hotspots. The Dehesa landscape in the province of Badajoz is a unique cultural historical landscape. It is imaginable that, with the right stimulation and promotion, the estates within this region could become the ambassadors and developers for the region's products, landscape and built heritage.

RURAL ESTATES ARE RARELY THE BIGGEST
TOURIST ATTRACTION IN A REGION BUT
TOGETHER THEY HAVE THE POWER TO SHAPE

**THE REGIONS IDENTITY.** Developing and promoting them together for their quality as small scale points of interest in a rural landscape creates a balanced spread of tourists and creates the possibility for more authentic experiences. This is a valuable asset in post-COVID Europe.

## REVEALING THEIR SPATIAL IMPORTANCE

Rural estates have always had a strong relation with the landscape and are often one of the actors responsible for the cultural landscape we now value for its many qualities. In the landscape park Bulskampveld, it is unquestioned that the current landscape structures and elements responsible for the high aesthetic and recreational value of the landscape today, find their origin in the many rural estates in these regions. However, the high number of rural estates is unknown for most visitors. The estates are often visually closed off by evergreen borders. Although these lend them their character, they also make them invisible to the untrained eye. In Badajoz and the Center region the link between the landscape and the rural estates is often ignored or its potential not understood. Getting the link across between the landscape and the rural estates and increasing the readability of a setting by restoring landscape structures and elements will result in an increased interest in, and appreciation of, rural heritage.



This map is showing the landscape park Bulskampveld in West Flanders with an indication of all rural estates and the land they developed in the past, resulting in the cultural historical landscape of today.



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# PART II

### ...COMMON GROUND

In this second part common ground is developed. In chapter three the different historical castles, manors and estates in the participating regions are defined as one type of heritage with specific characteristics. It is a tentative proposal intended to open the debate on the shared qualities of these sites across Europe. In the fourth chapter the common ground is made explicit by translating the needs of the different sites into 13 shared policy recommendations. These recommendations are intended to help increase the development possibilities of this European heritage type on a national and international level.



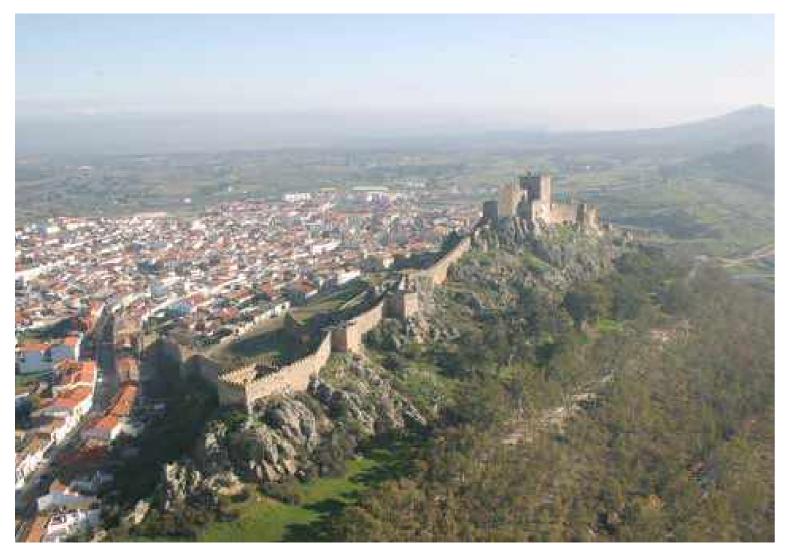








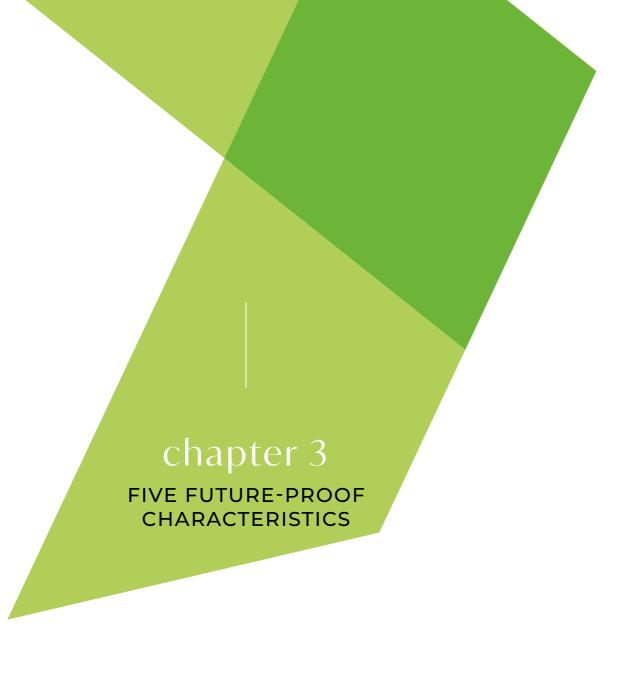












In Part I of this document to collected data has been analysed in a search towards striking similarities and differences between the regions. This made clear that all the different historical castles, manors, estates and country houses within the four participating regions have certain similarities. These similarities are not directly linked to their architectural features, the era in which they were originally constructed, the function they originally fulfilled or even the function they have today as similarities in these fields do not unite all estates in the different regions. However, common ground emerges when considering the intrinsic qualities of these rural estates. The Innocastle project made explicit all rural estates have certain unique though similar characteristics which have a potential value for the future development of Europe's rural regions. Through study visits and discussions, five characteristics became clear as central qualities of the rural estates in the different regions. In the next chapter thirteen policy recommendations are formulated which help to activate the qualities described in this chapter.

Drafting these five characteristics was not an objective within the project and there was no methodology developed to identify them. As such it is a tentative proposal explicitly made to start a discussion. Similarly the validity of these characteristics outside the four participating regions cannot be firmly stated. However, following the principle of random sampling, the knowledge gained in four random regions is expected to have a certain validity in other regions as well. Identifying these shared characteristics is a first step in understanding 'rural estates' as a unique heritage type existing all over Europe. It is an inherent future oriented gesture as it creates the knowledge to use these sites specifically for their unique characteristics. It creates the possibility to identify them within policy instruments and to develop specific measures and incentives to activate their intrinsic characteristics in regional development plans and public policy.

### 3.1 RELATIONSHIP WITH THE LANDSCAPE

Rural estates have a strong relationship with the landscape. This relationship originated amongst others out of the need for protection, control, production and recreation as well as the inherent qualities of the landscape. Throughout their history rural estates and their surroundings have transformed continuously. They are the result of the combined efforts of man and nature and form cultural landscapes. The Dehesa landscape in Badajoz is a beautifull example of that relationship between landschape and estate. In most regions the cultural landscape they form is under pressure or not visible anymore due to modernization, urbanization or land reclamation processes for example. Looking closely however to the position of the estates in the landscape, their dispersion, their structure and the structure of their context still reveals the underlying strength and presence of that cultural landscape.



The castle of Piedrabuena in Badajoz is found within the typical Dehesa landscape of the region. It is a cultural landscape based on agoforestry principles and the main elements are oak trees, cork trees, cattle and Iberian pig. Today the castle is still connected to its landscape and through agricultural rental this land is still maintained. The rural estates in the region can play an important role in this landscape in the future of this landscape as gateways, landscape managers or production centers for example.

### 3.2 DEVELOPMENT OF RURAL EUROPE

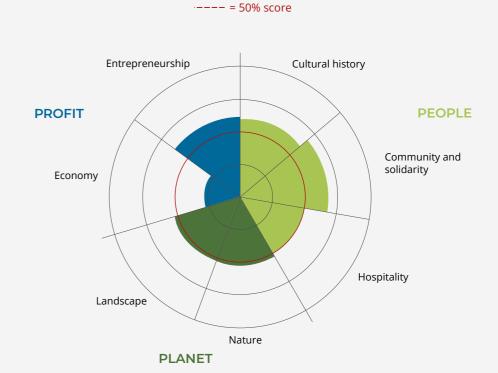
Rural estates played a key role in the development of rural Europe. This is directly linked to their relation with the landscape. In Badajoz the many castles were used as defensive and controlling mechanisms in the development of the Iberian Peninsula. In other examples, large scale agricultural activities not only created wealth for the owner but developed the land and municipalities as well. Wealth, accumulated in commerce, was invested in the manor houses and their surroundings which resulted in unique cultural hotspots. In these examples they functioned as cultural, political and productive hubs on a regional, national and even international level. They represent the bond between city and countryside. Today they can anew become hubs within rural areas. They can become experimentation & productive nodes for sustainable and local food production bringing together experts, local communities, farmers and restaurants. They can become living heritage labs and collaborate with universities and local craftsmen. They can be the focal point of the touristic development of a municipality or become cultural hotspots through unique on site productions and artist residences.



The historical development logic for this landscape around the current provincial domain Bulskampveld is clearly visible. In the 18th and 19th century heathland was transformed into agricultural parcels and forests. Today this cultural landscape is valued for its recreational qualities amongst others.

### 3.3 MULTIFUNCTIONAL

Rural estates are inherently multifunctional. On estates economic objectives have always been paired by ecological, cultural, historical and political objectives. Although the approach to these objectives is different in between regions and has changed tremendously throughout history as well, the value of the interaction between these objectives has not. This fundamental interconnectedness has led to a resilient system of multiple value creations. As a basic starting point on the one hand, each element is always approached for the multiple values it has. An oak tree in the Dehesa landscape is for example used to create a cooler and moistier microclimate which creates a pasture land which is used to grow pigs. They also produce acorns which are used to feed the pigs and firewood for winter. By-products always find a use within the ecosystem of the estate. On the other hand, the economic and socio-cultural activities on rural estates are approached as multiple communicating vessels. Economic activities on one part of the estate create room to develop more socio-cultural driven projects in another part and vice versa. This can be understood for example by looking at the artistic and architectural production of the past as well as how these productions have caused touristic interest which is now often monetised.

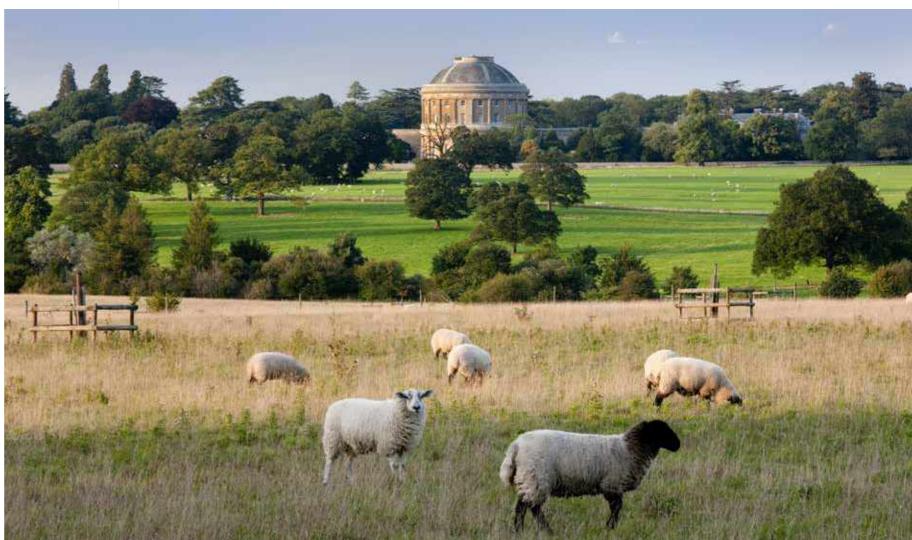


# Understanding the multifunctionality of a rural estate is important in the management of the estate.

The 'landgoedvenster' is an exploratory tool developed in the Netherlands by the PPO of Wageningen University & Research agricultural business unit amongst others. Through a questionnaire it identifies the quality of an estate relating 7 topics roughly grouped along a People / Planet / Profit diagram. The inherent multifunctionality of rural estates is translated in the objective to have a balanced score on all topics.

### 3.4 MULTIPLE SCALES

An estate always functions on multiple scales. This is directly connected to its multifunctionality. An economic activity and its by-products for example, function on different spatial- and timescales. If we look to the oak trees in the Dehesa landscape again we understand that the scale of the landscape, acorn producing oak tree and pig farming is different. The timescale as well shows huge variation with a seasonal cycle, an 18 month time span of traditional pig production and an average lifespan of 250 years for the oak tree. Because a rural estate is typified by these interactions it can only flourish when managed on the long run and by approaching the estate as a spatial unity functioning on different scales. While this has been specifically challenging in the 20th century it as well connects estates to ideas such as People, Planet; Profit and the Sustainable Development Goals set by the UN.



This image of the rotunda at Ickworth is showing the different spatial scales, typical for rural estates.

### 3.5 COMBINING LOCAL AND GLOBAL

Rural estates have always combined local rootedness with a global view. All estates are adapted to their regions topography, its climate as well as its cultural, political and economic traditions. They have adapted building, landscaping, foresting and agricultural techniques to the local conditions and as such helped create a local culture. As such they are intrinsically part of the identity of their region and represent the diversity of rural Europe. At the same time rural estates have always had a view away from the local condition. They are built or remodelled by clients with a certain cultural intent and they commissioned architects and artists to give substance to that intent. Rural estates fit within a growing European cultural production and certain structuring and representational principles at landscaping level, architectural level as well as interior level are shared between an estate in Romania and one in the Netherlands for example. Similarly, the development of shared traditions such as music production, hunting, cooking, gardening, agricultural techniques and so on, supported the forming of a unified history. As such they are part and even helped construct a shared European culture. COVID-19 has pushed the discussion on the balance between local and global into a new direction. Rural estates can help us understand that balance and guide us in our search.



The Rákóczi-Bornemisza estate in Romania is housing a dendrological park of more then 270 years old. In this park more then 350 species are found of which at least 100 are exotic imported species. It increased local and national knowledge on how these species interacted with the local conditions. It as well fits within a wide European tradition to experiment, share species and share knowledge across Europe.



The core question of the Innocastle project is what policy is needed to improve the preservation, transformation and exploitation of rural estates. In the previous chapter five characteristics are explained which are shared between the rural estates in the different regions. Understanding these sites as a specific type of heritage with shared characteristics makes possible the development of recommendations that will positively influence these characteristics.

The policy recommendations that follow are based on debates during the different study visits, peer reviews, thematic seminars, stake holder meetings and the baseline survey undertaken in the course of the project. They are divided in three groups and focus on a better understanding, a better valuation and a better development of rural estates. These recommendations are valid in the four partner regions, but it is believed they might be relevant all over Europe as well.

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### 114 CHAPTER II.II - POLICY RECOMMENDATIONS

### 4.1 UNDERSTANDING RURAL ESTATES

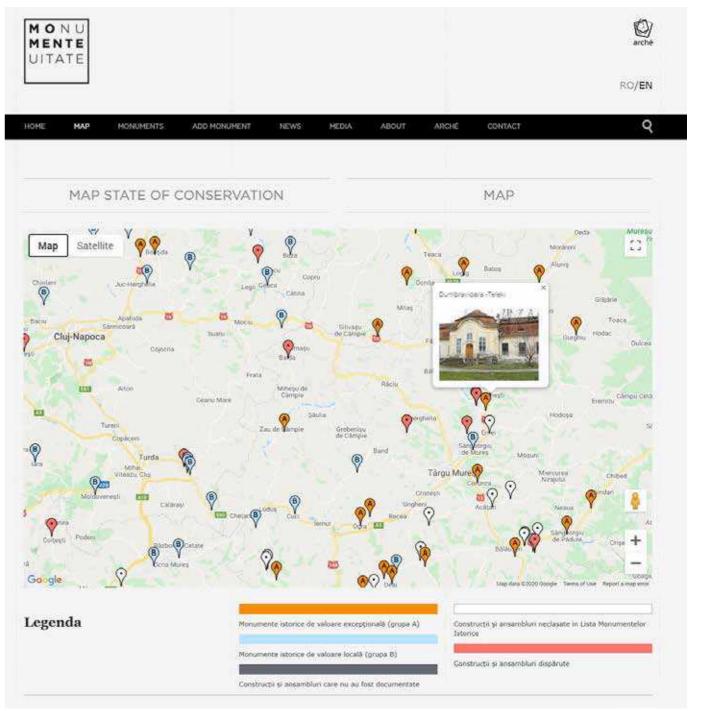
We need to know and understand rural estates in order to see their potential. One of the tasks at the start of the project was the collection of information in the different regions. This quickly pointed towards different gaps and challenges.

### **IDENTIFY RURAL ESTATES**

In order to get a correct identification of rural estates we need an internationally agreed definition of rural estates and centralized databases of both protected and non-protected heritage objects.

Although rural estates are a well-known heritage type, their identification is complicated. In the four partner regions we used existing heritage oriented databases to determine the number of rural estates. However, this was found to have severe limitations. In most regions the databases only include protected heritage objects. Also, the preceding debate on which heritage objects require protection is not documented. This hinders a debate on the followed protection strategy and limits the discussion to protected

heritage only. This renders rural estates which did not receive protection virtually invisible for heritage policy. When re-evaluating the approach and valuation of heritage, the sector can only fall back on databases that are the result of previous valuation methods. Moreover, as there are national, regional and local databases, the information on rural estates is dispersed. Besides, most of the databases lack a clear type or correct use of types of rural estates. In most regions rural estates are not identified by one overarching type but rather by a combination of types and historical references. This makes it hard to determine the number of rural estates in a specific region and complicates the collection of data.



### The Monumente Uitate project started by the Arché association in Romania creates an inventory of all rural estates in Romania.

This good practice results in a public accessible inventory collecting protected and unprotected rural estates. It combines historical maps and photographs with recent information and photographs collected during a site visit. As such it is a perfect base to integrate rural estate in local, regional and even national policy practices.



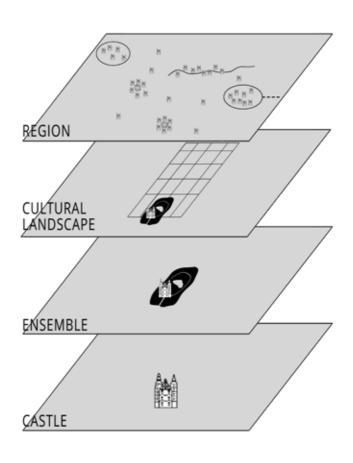
"There is a possible win-win situation between Powis castle and the municipality of Welshpool [...]

A good social-cost-benefit analysis for the wider area could come up with some interesting points to improve the economic position of the Welshpool area. There is much awareness on the economic interest of heritage, but less knowledge on how to diversify the beneficiaries."

- Joep de Roo, Eurodite



The activation of the potential of rural estates requires in-depth knowledge on the subject. However, information on rural estates is often scarce and inaccessible. Firstly, most heritage databases and monitors contain limited information on rural estates. In most partner regions it was very hard to find information on the condition of the estate and its different elements - both built and green heritage - the use, the size, the character – private, public or mixed-, the type and size of subsidies, the number of redevelopment interventions and so on. Secondly only a handful of reports have studied the economic value of rural estates. As rural estates are unique because of their rural and multifunctional character, it is hard to transfer findings of economic studies on heritage in general to rural estates in particular. Thirdly there is limited information on the role of rural estates in regional planning and development. Expanding information regarding to rural estates in heritage databases, executing detailed economic studies and collecting social, economic and spatial data on rural estates on different scales is needed to underpin the potential and value of rural estates.



### LOOK BEYOND THE CASTLE

Rural estates should be seen as coherent entities on different spatial levels. Policies regarding to rural estates should be based on the qualities, interaction and potential of these multiple levels. The image of a rural estate is mostly determined by the iconic buildings and the stories connected to these buildings. Although it is important to acknowledge the value of this image, there is also a need to appreciate more than this.

The study visits made clear that there are four spatial scales to take into consideration when discussing the meaning and development of rural estates. The most obvious and smallest scale is the central building. However, this building is part of an ensemble which can be understood as the second scale. Differing from region to region this can be the landscaped park, the walled vegetable garden, the fortified

courtyard, outbuildings, the rock on which the castle is built, the entrance road and so forth. The cultural landscape surrounding a rural estate is the third spatial scale. This varies from the productive grounds around the rural estate to the bordering municipality or the specific geological conditions of its surroundings. The largest scale looks at the region. It identifies clusters of rural estates with a shared genealogy and similar position in the landscape. These clusters influence larger parts of the landscape and offer opportunities for interaction. Each of these four scales was important in the origin and historical functioning of a rural estate and makes its identity. Today also, each of these scales and the interaction between them offers specific qualities and opportunities. This spatial approach is vital and is a new way of looking at

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### 4.2 VALUE OF RURAL ESTATES

As rural estates are complex multifunctional ensembles, their value depends on a complex interaction of different elements and aspects. During the project, numerous discussions focused mainly on three approaches of valuing rural estates: the heritage value, the economic value and the relational value. Essential is to keep all of these values in mind together.

# CREATE A DEBATE ON THE HERITAGE VALUE OF A SITE

A first group of discussions centred around the heritage value of rural estates. The heritage sector values heritage by evaluating it for different categories of subvalues such as for example artistic value, historical value, scientific value, contextual value, authenticity, unicity and so on. Although the categorisation of these subvalues varies from region to region, the overall idea is similar. It is an effort to give substance to the heritage value and make it explicit by means of qualitative descriptions. This way of working isolates the heritage value and is mainly intended to use within the own sector as a basis in the protection and funding policy. It is an expert approach with limited public participation. This method should have a certain continuity in time in order to guarantee equality

between protection dossiers spread in time. In contrast however, societies understanding and valuation of heritage is continuously evolving, does not follow objective criteria and differs from site to site. Both valuations are equal. Publicly discussing the distance between these two approaches is the most important step to guarantee a continued understanding and support.

# MAKE A NUANCED CONSIDERATION OF THE ECONOMIC VALUE

A second group of discussions was connected to the economic value of rural estates. Some rural estates have a demonstrable economic value, often connected to their location and usability. However, for a lot of others, this is not the case. As costs for maintenance and management are high, the viability of these rural estates is seriously threatened. Restoration and redevelopment projects sometimes result in maintenance heavy and loss-making sites without direct advantages for the local community and the surrounding region. It is however explained in different studies that these high direct costs are balanced by the high indirect benefits they usually generate. It is clear that the societal benefits of historic estates cannot be underestimated as these rural estates are carriers of regional identities, recreation, culture, art and biodiversity. Hence they provide an important contribution to a qualitative and healthy living environment. Social cost benefit analyses can help to understand better this cost / benefit ratio. To determine the total economic value in these studies, they express all possible values in monetary units in order to make the comparison possible. However, as expressing elements like aesthetic experience or social wellbeing in money is difficult and complex, the results and methods are also criticised. Moreover, the basic idea to express all values in money might suggest that all heritage is replaceable by something more economically sound, which is of course not the case.

More social cost benefit analyses must be executed and a general understanding of their strengths and weaknesses must be increased.

# A Social Cost Benefit Analysis is a good practice to make understandable all the direct and indirect costs and benefits of rural estates.

In Gelderland a study on the economical meaning of rural estates executed by Witteveen+Bos indicates a cost benefit ratio of 2,5 to 4,2. The study on 'the socio economic impact of heritage in Flanders' executed by SumResearch & KULeuven shows that the economic turnover connected to heritage is eight times the investment by the government. Far more studies can be mentioned and a good starting point can be the summarizing literature study 'the social and economic value of cultural heritage: a literature study' executed by Cornelia Dümcke and Mikhail Gnedovsky for the EENC in 2013. Within this overview several studies reveal the large spill-over effects of governmental investment in rural heritage.

120 Chapter II.II - Policy recommendations

## TAKE INTO ACCOUNT THE RELATIONAL VALUE

A third group of discussions focussed on the relational values of rural estates. This value expresses how we interact with a specific rural estate, what shared history we have, what feeling a certain site gives to local people and visitors, what position a specific site has in our societal network and so on. Restoration and redevelopment of a site or change in exploitation always have an influence on the relational value. Admittedly, this value is very personal and changes in time. But ignoring it because it cannot be objectified, limits our understanding and valuation of rural estates and heritage in general. More discussion is needed on the meaning particular rural estates have to us, the relation we have with it and the feelings it generates. Participative processes can help us to better understand this value.

### INTEGRATE ALL THE VALUES

Rural estates are explicitly multifunctional: heritage, ecological, agricultural, economical, spatial, relational... values all interact with each other. This interaction is a striking quality but also a big challenge. Too often, the specific value of a rural estate given by one specific sector (like the Heritage or the Nature Department) does not take into account the value seen by another sector. Although these sectoral valuations are necessary to gain specific knowledge, they are not always sufficient to make policy decisions. The challenge is to integrate all of them in order to get a total view on the true societal value of a particular rural estate.





"We discussed heritage as an instrument to think of values. To understand for example the value of materials, of stories, of events, of places and relations. To feel rooted is important. I believe it is vital to remind ourselves that heritage protection and the technical aspects of restoration and management are not an end in itself but need to serve those values."

- Bert De Roo, UCG-KASK

### 4.3 DEVELOPMENT OF RURAL ESTATES

All partners of the project agree that future oriented development is often the most effective preservation strategy for rural estates. The Innocastle project showed different development challenges and opportunities related to different cases and regions. Good practices furthermore helped to understand the potential and constraints of certain strategies.

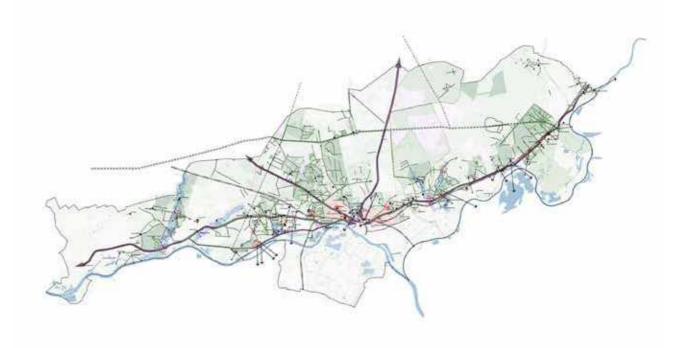


In all partner regions, due to their economic, cultural and political activities rural estates have a large influence on the spatial structures of their regions. Throughout history they were drivers for regional development and this for many reasons. They were the central point for land reclamation in war periods, for the development of unexploited land, for the political and economic control over a region or for the development of leisure activities for urban nobility. Until today, these historical activities create a strong connection with the surrounding landscape.

The challenges lies in re-activating rural estates as contemporary drivers for regional

development. One of the strategies can be to approach and promote rural estates as a network of individual sites with strong identities cooperating with a shared regional goal. Policy can stimulate and facilitate this cooperation, looking for complementarity spatial and social connections through regional hubs or by means of research by design developing future scenarios about the regional potential of such a network.





# Research into the characteristics and shared history of regional clusters makes visible their potential for regional development.

Gelders Arcadië is a cooperation between Gelders Genootschap, 5 municipalities and local estate owners.

The project started in 2007 and was one of the first country house projects that introduced a spatial approach to heritage, to estates as heritage ensembles in larger landschapes in a region with common structures and similar challenges. From the start the Province of Gelderland has supported this project.

Rural Estate Reuversweerd in Gelderland is part of a cooperation between the provincial government, the owner, the contractor, the technical university of Delft and other stakeholders.

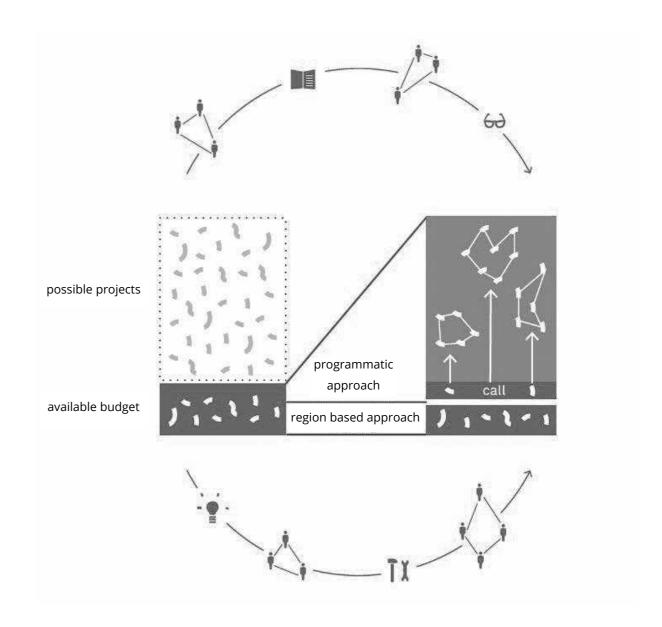
An on-site classroom facilitates vocational training, workshops and discussions between the different stakeholders. As such Reuversweerd is one of the Living Labs that are organised in the context of the provincial innovation program KaDEr, that promotes durablity in heritage. Redevelopment proposals by TU-Delft students are used as a trigger to discuss general development concepts. This redevelopment process is part of an ongoing project and will result in new methods of heritage conservation and development.

# INTRODUCE DYNAMIC PROCESS ORIENTED FUNDING

The redevelopment process of a rural estate is financially and technically challenging. Approaching this as an opportunity and not a hurdle to overcome can be beneficial for many rural estates.

Many funding channels which support the redevelopment of heritage are organised as a classic redevelopment process. An end result has to be defined up front and, if a proposal is approved, support is given to the construction works leading to that result. At the same time it is indicated in all partner regions that drafting this proposal is challenging. Not only is it difficult to identify the needed development, the funding structures and their application processes leading to that result can only be overcome with prior knowledge or expert guidance. Not all owners can furthermore comply to the application requirements because they do not have the capacity to follow the required redevelopment steps needed to receive funding. Sometimes long waiting times or the exclusion of certain types of owners add up to the complexity of redevelopment.

The Innocastle project showed that a process of heritage redevelopment should not necessarily fix a priori an end result. The first exploratory steps within this process for example can be a pivotal moment to engage direct stakeholders and increase the connection between them. Drafting preliminary designs or executing restoration research can be done in cooperation with educational facilities and through on site teaching. Local organisations and SME's who temporarily use the abandoned estate before and during the redevelopment can slowly inform and even clear the path for the redevelopment process. To make this a success it will be necessary to find the right balance between expert guidance, planning, structured processes, general funding on the one hand and on the other hand the freedom to experiment, to test and to organically discover the best redevelopment in co-creation with all stakeholders involved. Structural funding for process oriented redevelopments will create possibilities for sites that are difficult to develop.



The 'open space platform' is a good practice by the Flemish Land Agency (VLM) in Belgium that brings together different institutions to work on an active and integrated programmatic approach of the open space in Flanders.

As the diagram, developed by AWB & PLEN departement of architecture KU Leuven shows, each participating administration and organisation reserves a part of its sectoral funding budget to support local projects grouped by specific thematic challenges. A multitude of local projects spread across Flanders are guided and funded to work on a shared cross-sectoral challenge. With a small budget a high number of stakeholders increases its knowledge and a large area is influenced.

### 'Living labs' are valuable instruments in the continuous development of policy.

They are described by the 'European Network of Living Labs' as user-centred and open innovation ecosystems. They are based on a co-creation approach and integrate research and innovation processes in real life communities and settings. The Wildenburg estate in the landscape park Bulskampveld has functioned as a living lab at the beginning of the Innocastle project. Within this lab the possibilities of introducing a food layer to the historical park, replacing the disappeared understory and shrub layer, were explored in order to increase the economic, ecological and social value of the park. Meetings and site visits were organised with different stakeholders, policy limitations were discussed and on two workshop all stakeholders explored the potential of this redevelopment to eventually explore actual interested parties.



International documents such as the European Landscape Convention and the Davos declaration of Baukultur promote the evolving and simultaneous readings of our surroundings, stimulating their holistic understanding. However, in the different partner regions funding of rural estates is still largely intended to safeguard the canon of important cultural historical sites through investing in their heritage value. Other funding mechanisms, like nature subsidies focus on other specific values. Although these funding systems have their obvious merit, they often work separately and sometimes even hinder the holistic development of a site. Strategic cross-sectoral funding mechanisms which create connections between the funding structures of different sectors would help rural estates to address broader societal challenges as a holistic entity. This funding should supplement the sector oriented systems and can have a regional or a thematic focus.

### STIMULATE EXPERIMENT AS A STRATEGY FOR POLICY DEVELOPMENT

The variation in rural estates is huge and examples range from unique, intact rural estates of a certain style period or designer to those with a low heritage value or damaged in the course of time. At the same time rural estates also differ heavily concerning their economic, social or ecological potential.

This huge variation, combined with place specific, regional and global societal challenges make the future of rural estates unpredictable and complex. Experiment can critically question current approaches and propose alternatives. The organisation of living labs can be an interesting way to confront different stakeholders with the actual challenges of a specific site, in temporary policy neutral experiment zones. This also triggers discussions relating our general understanding of rural estates or about the role of policy. If organised within the right framework these living labs can lead to generalizable insights and policy measures. The stimulation, facilitation and initiation of experiment should be part of every policy development strategy on rural estates.



"I was deeply affected by the landscape, that huge column of vultures, and that castle behind it. I should probably remember that to my dying day, it was an astonishing thing..... These castles are in an astonishing landscape with astonishing wildlife,.... I just wonder if you promote to a more mature audience, with maybe a social conscience, and see extraordinary things that your friends won't see. And you go home and Facebook and Twitter, because they won't have been at Alburquerque...that's really quite a unique package."

- Ian Grafton is manager at Croft Castle for the National Trust and reacts to the unique combination of elements we experienced during our trip to Badajoz. The combination of elements created an experience we understand as part of the narrative of this landscape.

# CONTINUE THE NARRATIVE OF RURAL ESTATES

The different elements, experiences and events that happen at a certain estate are all part of the history of that place. By connecting these events into a narrative we try to understand the rural estate as well as our relation to it. Through narration a rural estate and its constituting elements enter the complex web of social understanding that merges memory, experience, practice and that narrative into a sense of place and community. Making explicit the narrative through storytelling or developing a biography of the estate are well known examples to help us connect to a place. The narrative helps us furthermore in understanding the possible futures of a site. The unique position of the rural

estates within the landscape in Badajoz, the tradition of agricultural experiment on many estates in Europe, their self-sufficiency,... all form possible starting points to continue the narrative and connect the estate to contemporary challenges.

Heritage policies which succeed in supporting the tangible aspects of rural estates through stimulating the continuation of their narrative will succeed in creating future proof heritage sites.

### STIMULATE A SHARED OWNERSHIP

The concept of ownership refers in this context to the idea that an individual can develop an increased sense of involvement towards a certain rural estate in so much that they identify with that place. This sense of ownership has positive effects such as an increased self-identity, a feeling of responsibility and belonging towards that specific estate. The feeling of ownership installs a dynamic relationship between the individual and that rural estate continuously infusing the estate with new meaning. Sharing that feeling with a diverse group of people (legal owner, local community, visitor, volunteer,...) creates a sense of community feeling and puts the rural estate at the centre of that community. In the Innocastle project we learned this is valid for publicly accessible as well as inaccessible estates and for publicly as well as privately owned estates.

Citizen science projects can be a very effective tool to create that relationship, increase knowledge and at the same time promote rural estates. Social media campaigns which invite to participate can furthermore stimulate involvement and can be effective in larger

regions as well as for specific rural estates. Visiteering is an example which engages the visitors of an estate as the caretakers of the day and immerses them in the reality and narrative of the rural estate. 'Visit Flanders' is stimulating and supporting local inhabitants to become 'place keepers'. These are people who have a strong ownership feeling towards their region and work with it or take initiative on behalf of their community. They are the backbone of a flourishing community and the best spokesman of it. The national Lottery community fund in the UK puts communities in the lead by funding amongst others community driven heritage redevelopment projects and communities that creatively interact with local history. WebKastely is a playful competition in which a local community competes with other communities by sharing knowledge and activities connected to their rural estate.

Heritage policies which stimulate people to develop a sense of ownership towards the rural estates in their community will put these rural estates in the centre of the community.









Liked by patrimoniu\_ro and 1.777 others

Making the rural estates in a region visible through interactive social media campaigns works! The 'Cronicari Digitali' initiative in Romania is one of the many social media campaigns on built heritage. By using communication strategies with influencers appealing to the younger part of the population these campaigns succeed in creating a sense of ownership feeling towards the heritage portrayed resulting in an increased engagement with these estates for example.

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# PART III FOUR REGIONAL ZOOMS

In the third and last part of this document, each region is represented by a chapter written by the different partner regions. The different chapters within this section group basic information along the four strands of the baseline methodology as well as information on the learning cases and first thoughts on the development of the local action plans. Together, they form a base for the comparison between the different regions, found in part one, and for the development of the action plans to improve the preservation, transformation and exploitation of rural estates in each region.





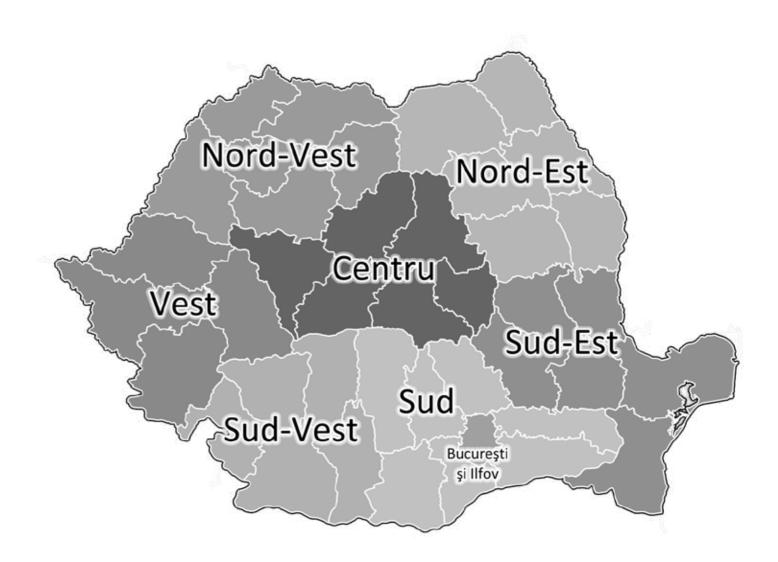
### 5.1 INTRODUCTION TO THE REGION

The Center Development Region is located in the center of Romania and it is geographically defined by the curve of the Carpathian Mountains as well as the Mureş and Olt rivers. Together with North-West and West Development regions, it used to be part of Transylvania, a historical region defined by its multi-cultural and multi-religious aspects and strong connection to the central and western-European values.

It is one out of eight territorial units in Romania equivalent to NUTS2 and comprises 6 counties: Alba, Brașov, Covasna, Harghita, Mureș and Sibiu. The region is expressed in legal form by an agency, a public utility non-governmental and non-profit organization coordinated by a Council for Regional Development in which the County Councils are main stakeholders. As such, the Agency for Regional Development Center has no administrative power being in charge with European funds, regional development plans, strategies and projects.

The main geographical element of the region is the Mures River, on which one can find some of the most important cities and some of the most impressive rural estates of Transylvania. The Center Region presents a relatively high accessibility rate and has a diverse and well-developed transport infrastructure comprising airports, railway lines, a pan european corridor and a consistent network of roads. It is important to mention that there is a significant discrepancy between the accessibility of the urban areas, connected through railways and modernized european and national roads and the rural areas served mostly by poorly maintained county and communal roads. The network of localities includes 57 cities and 357 communes, with the rural areas occupying 83% of the region's territory and gathering 40% of its population. Having 2,329 inhabitants the region has a low population density and is faced with a constant population decline in both urban and rural areas due to the high emigration rates that started in all of Romania after 2000. The urbanization level in the Center Development Region is high compared to the rest of the country but has dropped in the past years as a result of a "re-ruralization" phenomenon generated by the movement of the population to the rural areas adjacent to the large cities due to a better value of money. From an economic point of view the Center Region still keeps a mostly industrial profile as the sector has a significant contribution to the regional gross value, 33% in 2016 and occupies 30.8% of the active population. The services sector, concentrated in the large urban centers and their adjacent areas, brings more than 55.8% of the regional gross value and occupies 30.4 % of the active population. The agriculture sector, the traditional and main activity in the rural areas, produces only 4.6% of the regional gross value and occupies almost half of the rural population (16,8% of the active population).

Tourism is considered a sector with high potential and it has seen significant improvements on segments like agro-tourism, but it is not yet an important part of the regional economy. Various studies have shown that among the tourism sectors with the highest potential for development in the region are cultural and rural tourism, an aspect that can be linked to the region's cultural diversity and its rich nature. Despite being the main features of the region, cultural and natural aspects are not given the proper importance and are endangered due to constant and semnificative changes that affect the ethnic structure of the population, poor management of heritage, respectively constant loss of biodiversity and unsustainable exploitation. From a territorial point of view, tourism is currently focused on certain spots such as the mountain resorts and the large cities (Brașov, Sibiu and Alba Iulia), but one can see several efforts of popularizing all counties. Despite being at the beginning of developing the sector the Center Region is one of Romania's best known areas for tourism.



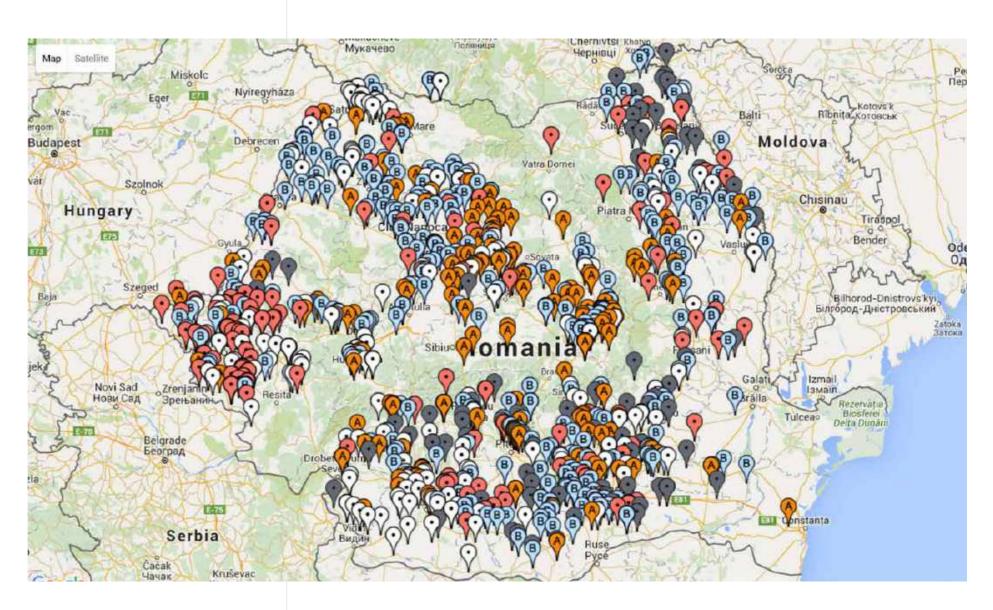
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### 5.2 RURAL ESTATES IN THE REGION

### **IDENTIFICATION**

Within the Innocastle project, in Romania, rural estates were defined by the project's experts as economic and administrative centers of the feudal domains that comprise a residence building and outbuildings (such as: kitchen, stables, granary, greenhouse, crypt, chapel or a parish church which served as a family burial place etc.); sometimes fortifications and a garden or park.

Based on this definition, the number of rural estates identified for this study was obtained from the online database entitled Monumente Uitate, which identified more than 1000 sites in Romania, of which only 870 still exist. The rural estates are generally evenly distributed between the development regions of Romania, with South-Muntenia (174) and Center (156) regions scoring the highest numbers and South - East (37) and Bucharest - Ilfov regions (19) scoring the lowest.



- ₱ Historical monuments with national and exceptional value
- P Historical monuments with local value
- 🧖 Constructions and ensambles not part of the Historical Monuments List (legally unprotected)
- Undocumented historical constructions and assemblies
- P Lost historical constructions and assemblies

### HERITAGE PROTECTION

From the perspective of legal protection, the Law no. 422/2001 concerning the protection of historic monuments, which is an organic law adopted by the state, defines the main frame. Historic monuments are inscribed on The List of Historic Monuments, upgraded and published in the Official Gazette every five years, by the Ministry of Culture. The National Institute of Heritage is the institution responsible for keeping the evidence of the historical monuments and operating any changes in the List of Historic Monuments. The historic monuments are defined as individual monuments, ensembles and sites, of national and local importance; the law provides the same level of protection, irrespective of the category to which a monument belongs to. The same law states that each monument enjoys a buffer zone. Another legal source of protection is represented by the regulations for territorial and urban planning. Local authorities should include in the General Urban Plans and the Zonal Urban Area Plans provisions for the protection of historic monuments and also define protected areas of local importance and heritage with urbanistic and architectural value, which are not inscribed on the List of Historic Monuments. Still, many times these instruments are less effective than expected, due to the fact that the General Urban Plans and Zonal Urban Area Plans of many local authorities are old and obsolete, not including adequate protection measures or/and not reflecting up-to-date the realities of the territory. This is even more so in the rural areas, having a greater impact on the rural estates.

### GEOGRAPHICAL POSITIONING

All rural estates are located within a range of less than 50 km from the nearest city. 5 estates are part of a city, 20 of them are at a distance of no more than 10 km, while the most isolated objective is located 38 km from a city. Most estates have another estate in the vicinity; the distance varies from a few tens of meters (for sites from the same locality) to 36 km. Most rural estates are grouped in compact areas or, more frequently, along landforms/roads. A network of over 10 rural estates can be identified between the localities of Bahna and Cornești, on a distance of about 25 km (in a straight line). Another network of 7 estates is located between Reghin and Sângeorgiu de Mures.

At territorial level, the Center Region's rural estates compose several clusters shaped in time by geographical elements and statal organization. Erected on the most important estates of the feudal domains the Center Region castles and manors were the heart of the rural areas. Their emergence and evolution in the multi-ethnical environment created by the rich history of the region resulted in a particular historical cultural landscape. In fact, several types of cultural landscapes can be identified in the region: (1) the economic and administrative rural networks, (2) the family owned domains composed of forests, agricultural land, human settlements, aristocratic estates, burial grounds and (3) the local relationship between natural surroundings, the village and the aristocratic

The Intra Carpatic area was historically divided into three regions that kept their general structure from 14th to the 19th centuries: the Magyar Counties, the Székely Seats and the Saxon Seats. This division had an important impact on the region's cultural, social and economic development that led to specific distribution and characteristics of rural estates.

### PAST TO PRESENT

The first evidence related to the emergence of rural estates in the Center Region dates back to the 15th and 16th centuries. The most important moments in their evolution were the first half of the 17th century and the 18th century, with heyday in between, when Transylvania became part of the Habsburg Empire and the rural estates paralleled the grandeur of the Central European ones with differences rising from economic status and local traditions. Up to the 18th century rural estates were divided between royal feudal castles and aristocratic fortified manors in a Renaissance style manner. Distinctive marks of the 18th century were Baroque buildings and a taste for grand parks and gardens inspired by French landscape design that replaced the defense systems. The 19th and 20th century were marked by the use of Historicist styles, while gardens are drastically remodeled following English design principles and acquired growing importance within the general composition of the estate.

The 1921 agrarian reform led to the loss of the economic status of rural estates in their regions, many losing forests or agricultural land. The estates were further affected during the two World Wars, when many were abandoned or used as military hospitals, with some being destroyed. Many collections, libraries and movable heritage were also lost. Finally, the Communist regime's "nationalization" process enforced the confiscation of privately owned estates between 1945-1949, which led to the poor maintenance and radical transformation of aristocratic estates that were used as hospitals,

factories, agricultural cooperatives, town halls etc. This period led to the spatial fragmentation of the historic estates, as the surrounding areas developed without regard to their historic context. After the fall of Communism, some estates were abandoned, while most went through years long restitution lawsuits. This led to fragmentation of estates, loss of compositional integrity and destruction of most of the gardens and extensive deterioration of buildings due to abandonment and vandalism.

Today, the rural estates in Romania are slowly gaining more public interest especially from NGO's and young people. At the same time, more and more private owners managed to regain their properties, after being in the state's property for one generation. However, spatial fragmentation as well as the ownership disruption widely impacted the capacity of owners to manage and financially sustain rural estates. The fragmentation affected especially parks, which have been generally destroyed and are difficult to identify currently. Moreover, only 50% of the estates still have all buildings on site. While they present a high touristic potential (especially as a network), they remain relatively inaccessible by the existing infrastructure. County and communal roads are generally in poor condition, and rural estates are not connected by alternative transport routes (bicycle, pedestrian). Local initiatives in this regard have encountered many legal obstacles, Route to Mureş of Unda Verde Association (Green Wave Association) from Târgu Mureş to Reghin, being one of the few.

### 5.3 STAKEHOLDERS

### STAKEHOLDERS ROP

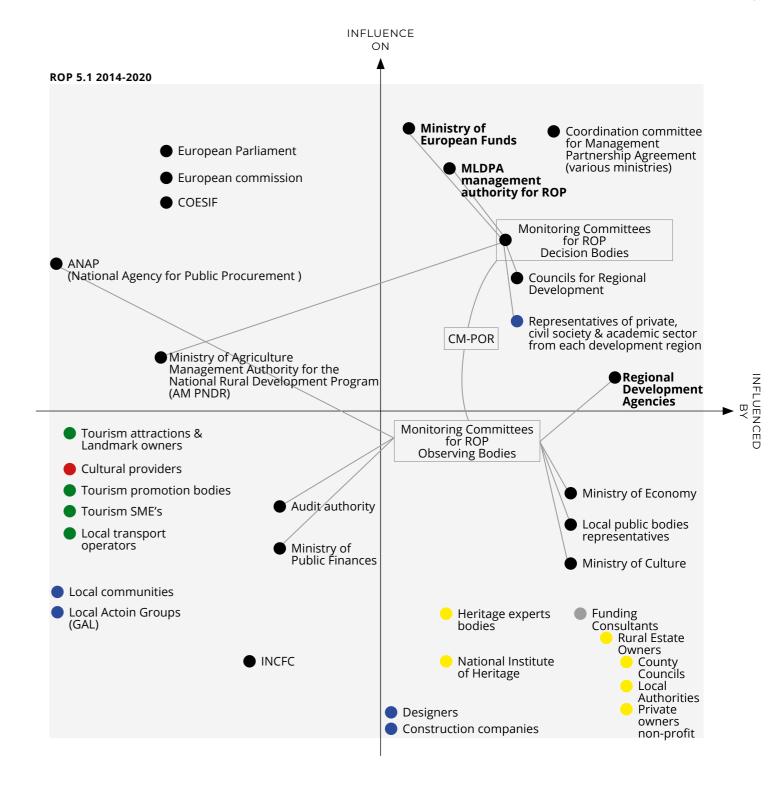
The Regional Operational Program 2014 – 2020 (ROP) represents currently one of the most significant financial sources for the restoration of historic monuments, in which investments are framed by goals of regional development and social and economic cohesion.

As such, the ROP is managed by the Ministry of Public Works, Development and Administration and negotiated at European level by the Ministry of European Funds. Axes 5.1, dedicated to restoration works is designed in the general framework of ROP and decisions are taken after consultations with various Ministries and interested entities from the private sector. It is important to mention that stakeholders from the private sector has less influence on the program than the public bodies that are part of the Coordination committee and the Monitoring Committees.

Although the Ministry of Culture should have an important input in the decision process

regarding Axes 5.1, its influence is limited due to low capacity and lack of relevant hard data. The National Institute for Heritage, heritage experts bodies, heritage NGO's, heritage owners if interested could be part of the Monitoring Committees for ROP but their presence is scarce and their voice little, having in the end very little influence.

On the other hand, the National Agency for Public Procurement has great influence on the program as it regulates the national procurements but is indirectly affected by the results of heritage restorations and therefore less interested in making sure that its decisions don't have negative impact on the sector. The Ministry of Agriculture, management authority for the National Rural Development Program that also has an axis dedicated to restoration of historical monuments and should coordinate its actions regarding restorations with the Ministry of Public Works, Development and Administration is little involved.



- General Governance
- Heritage
- Academia & Education
- Culture & Sport
- Landscape & Nature
- Agriculture
- Real Estate
- Infrastructure
- Other

## STAKHOLDERS NPRHM

The National Program for Restoration of

Historic Monuments (NPRHM) is the oldest state-

funded instrument for investments in historic

monuments, with a decades-long life and still running. Its particularities include the focus on the heritage value of historic monuments and on their preservation as the main goal. The program is managed by the National Institute for Heritage and all decisions regarding funding and objectives to be restored are validated with the Ministry of Culture through the minister and several departments. Due to its approval role regarding interventions on historical monuments the National Commission of Historical Monuments is an important stakeholder influencing the quality of restorations and often the timeframe of projects. Being one of the main financing instruments for restoration the decisions regarding the NPHR have a great impact on the sector, influencing the activity of heritage experts, NGO's and professional organizations and even more so over the private and public owners. Nevertheless all these categories of stakeholders have little impact on the decisions, with private owners being the least included in the decision process. On the other hand, stakeholders like the Nationa Agency for Public Procurement and the Ministry of Finance have great influence on the program as they regulate the national procurements and distribute public funds, but are indirectly affected by the results of heritage restorations and therefore less interested in making sure that their decisions don't have negative impact on the

The ministries, governing bodies, and different entities from related fields, that could have a great input in helping the main stakeholders of NPHR transform restored historical monuments in resources for sustainable development are the least included in the decision process and least interested in being part of it. In particular, the Ministry of Public Works, Development and

sector.

Administration and the Regional Development Agencies, which manage structural funds and therefore a similar historical monuments restoration program should be main dialogue partners of the Ministry of Culture and the National Institute of Heritage in designing the NPHR.

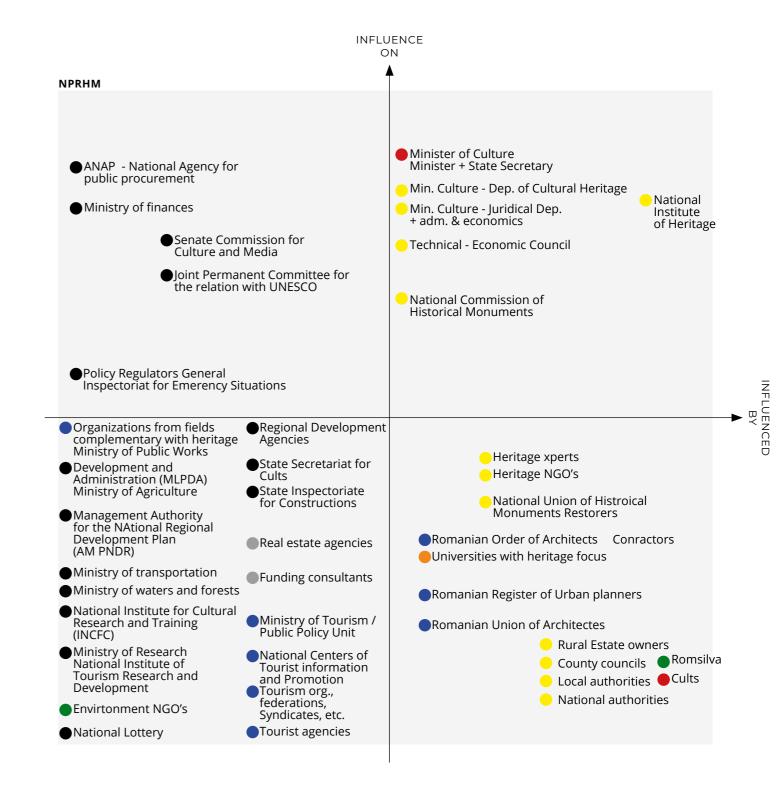
#### CONCLUSION

The different visions and implementation logic of the two programs are illustrated by their stakeholders' maps. Although both programs share a large part of the stakeholders their placement in different configurations depends largely on the focus.

Focused on the heritage value of historic monuments and on their preservation the NPHR is designed with little to no input from other ministries and bodies outside the Ministry of Culture and it has been in the past years insufficiently financed becoming one of the least relevant instruments.

relevant instruments.

Focused on regional development the ROP is designed with consistent input from different stakeholders. Although the Ministry of Culture should be the main dialogue partner on axis 5.1, its input has little relevance. We must also mention that the protection system of historical monuments, governed by the Ministry of Culture often fails to reach its goal. As such, ROP axis 5.1, the main financial instrument dedicated to restoration of historical monuments has a negative impact on the preservation of heritage values.



- General Governance
- Heritage
- Academia & Education
- Culture & Sport
- Landscape & Nature
- Agriculture
- Real Estate
- Infrastructure
- Other

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# 5.4 POLICY INSTRUMENTS AND RURAL ESTATES

In Romania the financing of investments in historic monuments and the supportive fiscal measures are defined by the Law 422/2001 for protection of the historic monuments. The law 422/2001 establishes that expenses for the protection of historic monuments can be covered from the state budget, from the budget of the local public authorities and from extra budgetary sources, and applies equally to public and private property. It institutes also the possibility of granting loans with reduced or no interest to private owners of historic monuments, destined to conservation and restoration works.

Although the framework for financing investments in historic monuments is defined in a comprehensive manner in terms of types of monuments and forms of property, the provisions of this law have been so far only partially implemented. Thus, private owners, natural and legal persons, benefit only to a very limited extent from the incentive measures destined to support investments in the protection of historical monuments. But recent developments of the regulations regarding investments in cultural heritage create the premises for a different future.

In 2019 the Romanian Ministry of Culture introduced the possibility to finance investments in historic monuments owned by natural or legal persons under private law as part of the National Program for the Restoration of Historic Monuments. This change in the financing regulations of the investments in historic monuments is even more important, if we consider the fact that a significant part of castles, mansions and historic residences are privately owned. The re-defined National Program for the Restoration of Historic Monuments becomes one of the instruments with potential in changing the fate for this type of monuments.

In the following part of this chapter the main instruments for financing investments in historic monuments are explained. The two first instruments are more elaborately explored in this project.

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REGIONAL OPERATIONAL
PROGRAM 2014 - 2020 INVESTMENT PRIORITY 5.1
CONSERVATION, PROTECTION,
PROMOTION AND
DEVELOPMENT OF NATURAL
AND CULTURAL HERITAGE
(ROP)

ROP 2014 - 2020 is co-financed from structural funds, through the European Regional Development Fund, and from the state budget of Romania, with the Ministry of Regional Development and Public Administration as Managing Authority. The general objective of the program is to increase the economic competitiveness and to improve the living conditions of the local and regional communities by supporting the development of the business environment, the infrastructure conditions and the services, which will ensure a sustainable development of the regions. The conservation, protection, promotion and development of the natural and cultural heritage is one of the 14 investment priorities pursued through the ROP 2014-2020, related to the thematic objectives of the cohesion policy at European level. At the level of objectives, this priority is linked to local development.

With a total program budget of more than 8.3 billion euros, the investment priority 5.1 commits 326 million euros for investments in the protection and capitalization of historical monuments. The funds from the ROP 2014-2020 are distributed to the 8 development regions, and the funds are granted to the owners and administrators of monuments following public competitions of regional level.

## **Organizational structure**

As a financial instrument in the frame of European Structural and Investment Funds (ESIF), the Regional Operational Program 2014-2020 is governed by EU Regulation 1301/2013 on the European Regional Development Fund. At national level the management of ROP 2014 - 2020 is assured by the Romanian Ministry of Regional Development and Public Administration, together with 8 Regional Development Agencies, which are acting as intermediary bodies in relation with the beneficiaries of the financing contracts and monitors projects' implementation. ROP Management Authority is under the coordination of the Ministry for European Funds, the national authority which ensures at national level the strategic planning and the normative and institutional frame for implementation of ESIF in Romania.

## SWOT-ANALYSIS

STRENGTH	WEAKNESS	OPPORTUNITY	THREAT
Recognition of the economic importance of heritage (premise of ROP)	Treatment of heritage restoration similar to industrial investment, ignoring community-development aspects	Innocastle projects – bringing good practices and learning experiences	Difficulties encountered by the Management Authorities in managing the programme and securing the cash flow
The awareness-raising component for the general public (the mandatory publicity for the beneficiaries)	Lack of quality criteria specific to restoration initiatives	The undergoing initiative of the Romanian Ministry of Culture for the elaboration and adoption of the Heritage Code	Difficulties encountered by beneficiaries in implementing the projects and securing the cash flow, as it was shown by 2007-2013 exercise (unfinished projects)
The integration of cultural heritage into regional development	Limited understanding of the potential spill- over effects of heritage restoration in social, educational and economic terms	Growing interest of the Romanian public and of the civil society towards heritage	Implementation calendars not always suited for restoration interventions
Allocation of financial resources for heritage restoration	"Wrong education" of the public: learning about heritage and heritage restoration from cases of bad restoration projects creates the wrong image about what restoration is and should be		
	Inflexibility of the project plans, which doesn't fit the needs of restoration projects		
	Addressing only monuments owned by not for profit legal persons		

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THE NATIONAL PROGRAM
FOR THE RESTORATION
OF HISTORIC MONUMENTS
(NPRHM)

This is the instrument through which the Ministry of Culture funds research, consolidation, restoration and enhancement of historic monuments. The program is currently managed by the National Heritage Institute and is governed by the methodological norms established by order of the minister. The specificity of this program is given by the fact that the services needed for the interventions on the historic monuments are contracted and paid for by the program manager, i.e. the National Heritage Institute, the latter having the role of contractor in relation to the providers of design and execution services of the restoration works. NPRHM is one of the oldest instruments for financing the restoration and conservation of historic monuments in Romania, and in time it suffered various changes in terms of both regulations and management. The program is open to historic monuments owned by public authorities and institutions, by religious organisations and, since November 2019, by natural and legal private persons. NPRHM finances activities of research, consolidation, restoration and valorization of historic monuments.

### **Organizational structure**

NPRHM is funded from the Romanian state budget, on an annual basis, and managed by the National Institute for Heritage. The Institute is responsible with the annual planning and execution of investment projects, while the Ministry of Culture approves the investment plan and secures the funds. The planning is based on priorities established by the National Commission of Historic Monuments, scientific body working along the Ministry of Culture, with a deliberative role in the heritage field.

## **SWOT-ANALYSIS**

STRENGTH	WEAKNESS	OPPORTUNITY	THREAT
Specialized instrument, dedicated to interventions for immovable heritage	Allocation of funds based on annual planning, leading to gaps in the cash flow of the program	The recent change of the program, allowing participation of historic monuments owned by private persons	Competing financing instruments, which offer larger amount/ceilings of investments for restoration projects
Management is provided by a specialized institution, holding specific expertise	Difficulties in respecting the calendar of execution for ongoing investment projects, due to lack of funding (interrupted or abandoned restoration projects)	Innoastle projects – bringing good practices and learning experiences	Potential loss of relevance if the annual allocations continue to drop
Quality criteria explicitly presented in the program	Reduced funds in the last years	The undergoing initiative of the Romanian Ministry of Culture for the elaboration and adoption of the Heritage Code	Potential difficulties in working with private owners, due to underdeveloped legal frame
Access open to all types of owners: public authorities and institutions, religious organisations and natural and legal private persons	Reduced interest from the potential providers of services (architectural design and execution of works)	Growing interest of the Romanian public and of the civil society towards heritage	
	Reduced transparency concerning the planning and the execution of the program		
	Lack of expertise in working with natural and legal private persons		
	Insufficient human resources from NIH for the management of the instrument		

## **HISTORIC MONUMENTS** STAMP DUTY

The Historic Monuments Stamp Duty was established in 2001, through the Law for the Protection of Historic Monuments (Law no. 422 from 2001) and it constitutes an extra-budgetary source of financing actions for the protection and preservation of historic monuments in Romania. In September 2019 a new legal procedure was established for the granting of financing from funds collected through the application of the Stamp of Historic Monuments (Government Decision 691 from 2001, modifying the previous decision 1502 from 2007). The new procedure defines a new frame for the way funds collected through the Historic Monuments Stamp Duty are being spent, creating the premises for a modern and transparent financing instrument dedicated to the protection and preservation of historic monuments.

The Stamp Duty is applied to natural and legal persons: economic operators, publishers or producers, owners, holders of the right of administration or other real rights for buildings situated in the protection zone of historic monuments, in protected built-up areas or from beneficiaries of the revenue made, as appropriate.

### **Destinations for the collected funds:**

- Elaboration of technical-economic regulations and documentations, norms and methodologies on the development of specific documentation, execution of works for the protection of historic monuments;
- Financing of works for the preparation of historic monuments for free visitation, as well as the implementation of cultural programmes or projects.
- Granting credits necessary to carry out protection works on monuments owned by natural or legal persons governed by private law, with priority to emergency interventions on historic monuments;

## **Beneficiaries:**

Natural or legal persons governed by public or private law who have the status of owner of the historic monument, holder of a right of concession or use for a duration of more than 25 years, or holder of the right to administer a historic monument.

## **SWOT-ANALYSIS**

STRENGTH	WEAKNESS	OPPORTUNITY	THREAT
Extra-budgetary funds, not depending on the state budget	Limited funds, as the collection of funds is influenced by the market conditions (i.e. events being organized in the vicinity of historic monuments)	The recent new legal provision, allowing to relaunch the instrument on new and improved basis	Risks concerning the dropping in the collection of funds, due to the coronavirus crisis
Management is provided by a specialized institution, holding specific expertise	Lack of expertise inside NIH to conduct grant- giving operations	Innocastle projects – bringing good practices and learning experiences	Potential difficulties in working with private owners, due to underdeveloped legal frame
Increased control from NIH on both collection and distribution of funds	Lack of expertise in working with natural and legal private persons	The undergoing initiative of the Romanian Ministry of Culture for the elaboration and adoption of the Heritage Code	Risks of losing credibility in the eyes of potential beneficiaries, due to unprofessional and bureaucratic managemen of the calls for proposals
Diversity of the types of operations that can be funded	Insufficient human resources from NIH for the management of the instrument	Growing interest of the Romanian public and of the civil society towards heritage	
Access open to all types of owners: public authorities and institutions, religious organisations and natural and legal private persons			

## RO-CULTURA

RO\_CULTURA is a program co-financed by the Financial Mechanism of the European Economic Area (EEA) 2014 - 2021 and from the state budget, which includes a financing line for the restoration and revitalization of historical monuments. The program is managed by the Ministry of Culture and National Identity, through the Project Management Unit, and is currently in the stage of receiving and evaluating funding applications (2019). RO-CULTURA program is a novelty in the landscape of investments in historical monuments in Romania, as it is the first such program based on the mechanism of state aid.

THE NATIONAL PROGRAM FOR RURAL DEVELOPMENT 2014
- 2020 - SUB-MEASURE 7.6
INVESTMENTS ASSOCIATED
WITH THE PROTECTION OF CULTURAL HERITAGE

Co-financed from the European Agricultural Fund for Rural Development (EAFRD) and from the state budget, this program is managed by the Ministry of Agriculture and Rural Development, through the Agency for Financing Rural Investments. NPRD 2014 - 2020 focuses on the economic and social development of the rural areas of Romania, with a total of approximately 9 billion euros available for investments. The financing line 7.6 Investments associated with the protection of cultural heritage is designed to complement the investment priority 5.1 of the ROP 2014 - 2020 and offers financial support for the maintenance, restoration and modernization of the cultural heritage objectives of local interest, monastic settlements and community cultural centers.

## 5.5 LEARNING CASES AND CHALLENGES

## LEARNING CASE 'THE TELEKI TRIANGLE'

Gornești castle ensemble, Dumbrăvioara castle, Glodeni manor

New ways to fund and conduct research, based on a historical landscape approach

**Location**: Gornești, Dumbrăvioara, Glodeni, Mureș county

**Ownership:** Private, Mixt and Public - this is based only on the ownership of the listed heritage items and the visible parts of the park. Actually, based on historical fragmentation, all estates have mixt ownership.

Heritage status: protected

Conservation status: good - medium.

Objectives of learning case: Yes (Gornești), No (Dumbrăvioara, Glodeni)

#### Introduction

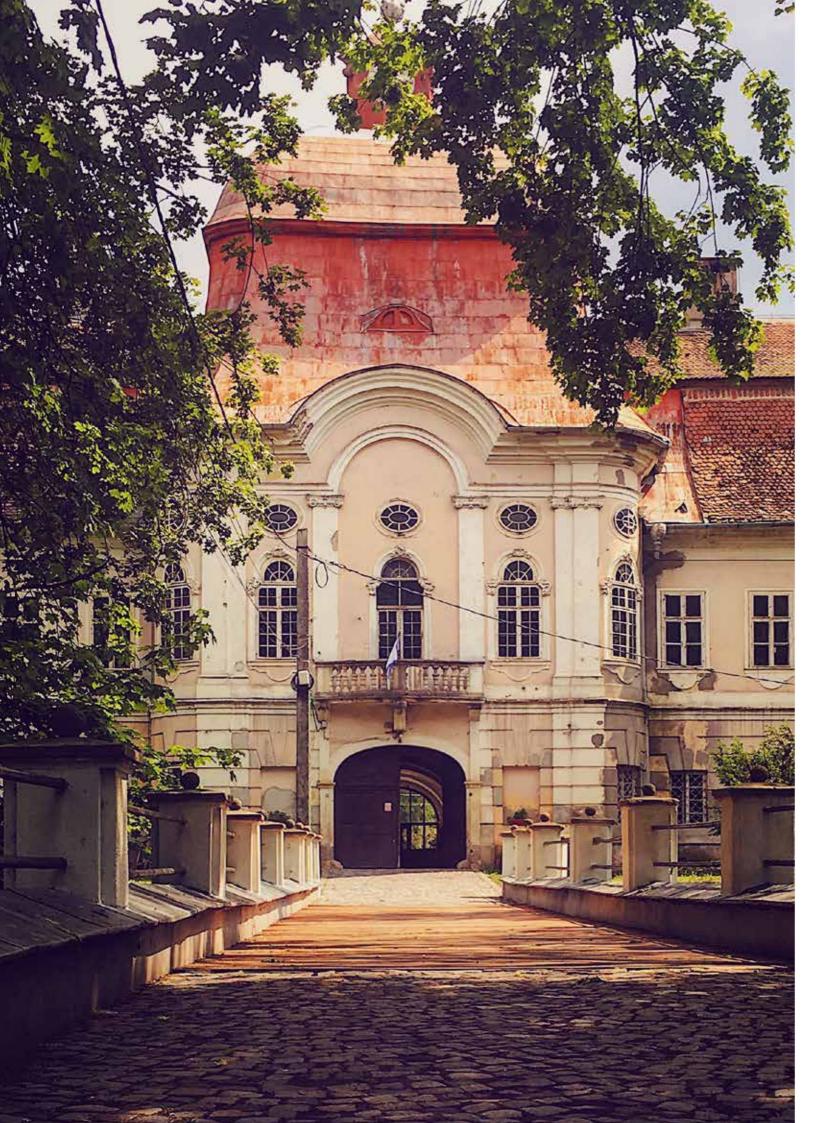
Teleki triangle reunites three historic estates, each comprising the castle, its park and a crypt. Gornești and Dumbrăvioara are private property, Glodeni is public property with the intention of being sold in the near future. The three estates belonged to the Teleki family, one of the important aristocratic families in Transylvania.

Among them, the castle in Gorneşti is the oldest and most significant for the family. The estate was given to Mihály Teleki, chancellor of Transylvania in the second half of the 17th century. The family transformed the medieval citadel into a Baroque castle in the following centuries. Comprising several historic layers, the former residence, as well as the park, a series of annexes and the family crypt can still be found on the property and in the nearby area. During communism, the village expanded on the former

estate, altering its structure. Several remaining annexes (granary, stables) are located outside the current castle grounds, hidden behind modern buildings. After receiving back the property several years ago, the family founded an NGO dedicated to revitalizing the estate. Today, it functions as a museum and event center and is open to the public.

The history of the Teleki estate in Dumbrăvioara began in the late 18th century, when Samuel Teleki, chancellor of Transylvania and founder of the Teleki library in Târgu Mureș, started building a manor. The final building phase was led by Teleki Samu in the early 20th century, who built the central volume, linking the two wings. Samu Teleki was a famous explorer and he brought back many trophies from his expeditions, which he exhibited on his estates. In communist times, it was transformed into a school, then given back to the family several years ago. Recently,





the castle and part of the park was bought by a private investor who wishes to transform the estate into a medical retreat with cultural and leisure features. The rest of the park belongs to the local community. The park is not listed, although it still has some visible heritage features.

The estate in Glodeni previously had two manors, but one was demolished after WWII. The remaining estate was extremely fragmented in order to offer room for the development of the village. Today, the existing manor houses a facility for people with special needs and is inaccessible to the public. The family crypt, located in the present day cemetery, can be visited. It is abandoned and in a poor state of conservation. The park has been lost and only a small garden remains in front of the manor.

### Challenges

Fragmentation of the historical estates as well as a complex ownership structure remain the main challenges within the region. The cultural landscape has been deeply transformed in the last century, and especially during communism - the Mureș river was channeled, changing its course, the villages changed their structure and new houses were built on the domains. Also, new structures, necessary for the new uses of the castles and manors, were built on the estates. The three crypts that were once an important part of the estates - having a strong visual connection with the castle - are now disconnected from the estate, as they are located far from the manors, either on a hill, or in the village cemetery. The visual connection has been severed and the structures are hard to maintain.

Owners of the estates are hesitant to cooperate, and there is a lack of knowledge on how to finance and approach historical monuments in order for them to function together. This lack of cooperation leads to creating scenarios with overlapping functions and services, which further

lead to the estates competing against each other in a non sustainable way. Instead, through good cooperation among all owners and stakeholders, they can develop complementary services, making these estates more attractive to a wider audience and create recurrent visitors.

#### Objective

We wish to enhance collaboration between the owners of the three estates and local and regional stakeholders. Our aim is to use a territorial approach to generate a common framework for the estates and the neighbouring areas, in order to create an integrated approach from both the functional point of view, and the financing needed for restoration. We also wish to promote the concept of programming in order to create a sustainable connection between the estates and develop an offer that attracts a recurring and diverse public.

The plan here is to test the landscape approach previously implemented in the Netherlands.

To be able to do this, more information on the connections with different stakeholders needs to be gained. Valuable would be to know where to find funding for research, rehabilitation and transformation of the estates. Administration and business models on how to sustainably reuse rural estates should be gained through participation in Innocastle.

#### Good practice

- Programming, visiteering, The
   ARCHÉ summer school, the territorial
   (landscape approach), the Ambulance
   for monuments in order to
   restore structures in urgent need of
   conservation.
- The Middachten example can be used as an example framework for the cooperation between public and private owners.

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## LEARNING CASE RHÉDEY CASTLE

**Example of multiple financing** 

**Location**: Sângeorgiu de Pădure, Mureș county

Ownership: Public

Heritage status: protected

**Conservation status:** excellent (the castle), poor (annexes and park)

Visits allowed: Yes
Present use: Museum



## Introduction

The estate has several stages of construction and the castle gained its current form in the early 19th century. The castle was restored through the National Restoration Programme between 2009 and 2015. The local authorities bought neighboring plots to recreate the historic park and also have plans to restore the annexes. Today, the castle houses a local museum and community spaces and is open to the public. One of the key historical figures linked to this estate is Countess Claudine Rhédey von Kis-Rhéde, the great great grandmother of Queen Elisabeth II of England.

The restoration of the castle created the premises for the local authorities to further access funds and also invest resources from the local budget in order to set up the exhibits and think of ways in which to further valorize the estate.

## Challenges

The quality of the architectural and restoration interventions should be improved, as damage can already be seen on the castle. Future interventions on the nearby buildings and on the park should take into account the lessons learnt from the restoration of the castle.

Also, the historical center of the town has multiple heritage values, grouped close to the castle: the nearby church, several historic houses, traces of the park. The restoration of the castle can act as a catalyst for further projects that can revitalize the area. For this to happen, local authorities need to act strategically in order for their efforts to have a larger impact.

## Objective

One of the aims of this learning case is to study how this project went through all the stages within the National Restoration Programme: from concept, through tenders, execution and current management. The second step will be to study how local authorities accessed diverse funding for complementary projects.

## **Good practice**

Lessons learned from the local administration's experience with diverse funding programmes.





## LEARNING CASE - THE BORNEMISZA ESTATE

The Bornemisza Castle Ensemble and Gurghiu archaeological site

Layers of history

Location: Gurghiu, Mureș county, Romania

Ownership: public (two public county administrations) Heritage status: protected (Grade A - national importance)

**Conservation status:** good

Visits allowed: Yes Present use: unused

## Introduction

Bornemisza Estate includes multiple historical elements within its surroundings castle, park, chapel, archaeological site and the citadel. The castle has a project intended for ROP. The historical assets are divided by several public owners: the castle belongs to the Mureș County Council, while the park and the citadel located on the nearby hill belong to ...

While the citadel dates back to the 14th century, the castle's history began in mid 17th century, when Prince Rákóczi György I built a hunting manor (with a park) in Renaissance style at the base of the hill where the citadel is located. Further on, the estate passed to the Bornemisza family, who expanded it and also built several industrial facilities (porcelain factory). They also redesigned the park in Romantic style. In the 19th century, the estate passed to the state and became a hunting manor for Kronprinz Rudolph II of Habsburg. After his death, it was transformed in 1893 into a professional forestry school, the surrounding park being a valuable training resource. In 1970, when the new building for the forestry school was

finished, the castle was transformed into a museum, which also housed several of Samu Teleki's hunting trophies (brought from the castle in Dumbrăvioara). In 2008, the estate was transferred to the Mureș County Museum.

## Challenges

In order for the entire estate to be properly revitalized, its restoration and interpretation must take into account the multiple historical values that can be found in both the citadel and the castle and its park. Fragmentation of the historical estate and division between owners remains an obstacle as they struggle to find a suitable framework for cooperation. The existing restoration, transformation and activation project that focuses on the castle alone is of poor quality and is not sustainable. This project was conceived for the former financial exercise and was meant to transform the castle into a cultural facility with a hotel and spa. It did not receive funding and the County Council is currently looking to improve it.





## Objective

To enhance collaboration between stakeholders and create a sustainable plan for the estate.

One solution would be to integrate the former function of the castle - the forestry school - into the future revitalization scenario, creating a regional training centre for the research and restoration of historic parks. Given the multitude of historic parks in need of skilled human resources, this scenario would be sustainable and would offer substantial benefits to the area. For this to happen, there is a need to reinvolve the Ministry of Education, the former owner of the castle during the modern part of the forestry school's functioning, who gave up the property.

Accessing multiple funding sources for a framework of complementary projects - as is the case for the Rhédey castle - can provide resources for this type of complex project that is both sustainable from a functional point of view and also integrate the values offered by the way in which the estate was used.

The aim of the learning case is to study how PNR can be complementary to other funds and to see how the programme's impact on restoration works can be improved (also through the use of the Historical Monuments Stamp Duty for research and local activation). Cooperation between owners in order to improve the quality of restoration works is needed. Rural estates need complex finance schemes and new investments that include different types of national and international funds.

## Good practices

Stakeholder involvement and negotiation - a period dedicated to dialogue that will facilitate the creation of a good plan for the entire estate. The Middachten learning case - example for a framework of cooperation between public partners in regard to historic domains in public property.

# <sup>5.6</sup> TOWARDS AN ACTION PLAN

Through various stakeholder meetings, baseline survey and learning cases, several improvement points have been developed for all heritage financing programmes in Romania which could be further addressed in the action plan. They are organized related to the themes knowledge, quality and development & re-use.

	Development & re-use	Lack of a strategic plan on a national and local level in terms of heritage conservation.
	Quality	Deficiencies of the legal framework leading to contradictory rules and poor enforcement of control mechanisms.
	Development & re-use	Due to being a low trust society, there is limited openness and know-how in developing partnerships around historic monuments at all levels: Public-Public partnerships (Forming a heritage alliance between the various level of public governance), Private-Private partnerships (The interdisciplinarity approach), Public-Private partnerships (Lack of capacity).
	Knowledge	The general lack of data about historic monuments hinders the prioritization of funds in order to ensure safeguarding of heritage, and it also makes it difficult to develop appropriate financing instruments.
	Knowledge	Generally, parks are not well known or evaluated as monuments on their own.  Often, they are in a bad condition. There are no dedicated funds for green heritage, but it can be included as landscape design in a restoration project, however with no assessment of heritage values. As it is a relatively new field, there are very few specialists in this field.
	Quality	Need for complementary financing instruments for pre-design and post- restoration phases. In the current context, there is a lack of appropriate research prior to planning and execution and of sustainable maintenance plans.
	Quality	Low quality professional services regarding research, design and execution, related to the lack of competitiveness and continuous professional development (CPD). Lack of certifications for contractors of restoration works (as legal persons).
	Quality	Outdated mentalities and approaches of both professionals and the general public, which favor reconstruction of the ruins (Disneyfication).
	Quality	Lack of know-how in preventive maintenance.
	Development & re-use	Very few examples of initiatives involving the local community. Lack of know-how in community development.
	Development & re-use	Lack of know-how in developing dynamic cultural programmes based on heritage interpretation plans to raise engagement, as well as in branding and promoting cultural heritage sites based on local specificities.
	Development & re-use	Not enough know-how in both owners and public authorities in the sustainable exploitation of cultural heritage and/or innovative reuse models/ business models. Moreover, public financing instruments for restoration limit the possibilities of carrying out economic activities in the sustainability period.
	Quality	Need to encourage and support knowledge, production and use of traditional materials through creating an adequate regulatory framework. Risk of loss of expert craftsmen and of craftsmanship education.
	Development & re-use	EU funding is difficult to access by low-capacity owners, with some support schemes and measures being needed in this sense.

GENERAL CHALLENGES

	Quality	The framework agreement ROP can only be modified during the negotiation period, in the beginning of the programming cycle. Lack of flexibility.	
GOVERNANCE CHALLENGES	Development & re-use	Lack of collaboration across sectors in the design of EU-funded financing instruments. The role of culture and heritage specialists in design of EU funds for heritage restorations is very limited.	
	Quality	Stakeholders are involved in the design of financing instruments in a very punctual and formal manner through public consultations, instead of promoting co-creation and structural involvement of various sectors in the design phase.  Decision-making is unilateral and very centralized.	
	Development & re-use		
	Quality	Lack of capacity of the heritage sector in general to answer the realities on the field.	
STRUCTURAL CHALLENGES	Development & re-use	Diversification of project evaluation indicators (examples) to monitor the long term impact of the restoration projects. Impact monitoring only on medium-term (5 years). Limited type of indicators, used for measuring the success of a project, not offering a complete and adequate picture (for example ROP are mainly economical and tourism). In particular, a neglect of the indicators measuring aspects like interpretation, maintenance and added value to the local community.	
	Development & re-use	Lack of understanding for the role that cultural and creative industries could play in ensuring the sustainability of a restoration project, and therefore no funds or resources available for collaboration with these industries.	
	Development & re-use	A focus of the public funding of investments in historic monuments (both national and European sources) on the cultural and touristic use of monuments, neglecting other potential uses.	
	Quality	Inadequate norms of public procurement, which doesn't allow the use of selection criteria relevant to restoration design and interventions.	
OPERATIONAL CHALLENGES	Quality	Rigidity as regards the execution of the approved plans, not allowing rapid reaction and adaptation to unpredicted realities which might occur during restoration works	
	Quality	Deficiency in the monitoring and quality control systems used during and after the completion of the restoration works and limited possibilities to apply sanctions	



## <sup>6.1</sup> INTRODUCTION TO THE REGION

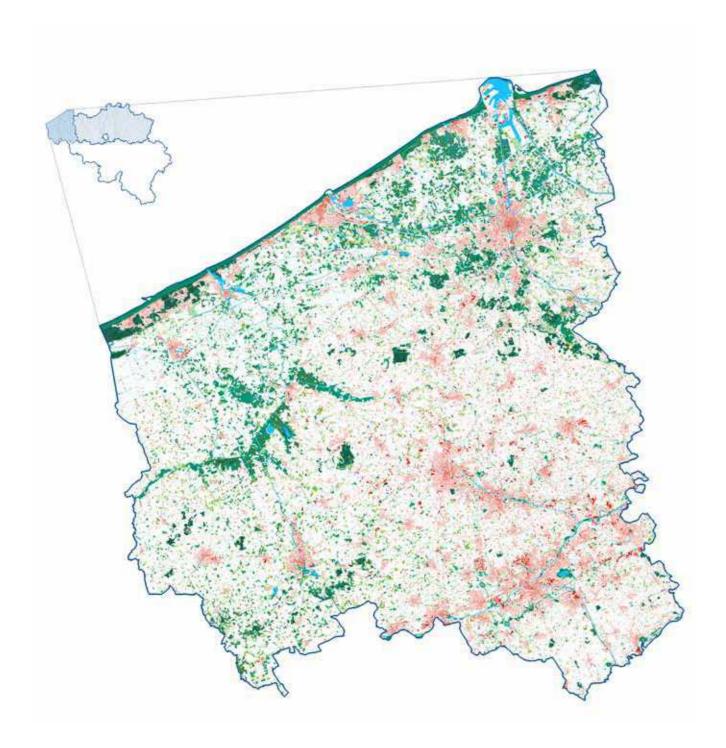
West Flanders is the westernmost province of the Flemish Region in Belgium. It is the only coastal province in Belgium, facing the North Sea to the northwest. It has land borders with the Dutch province of Zeeland to the northeast, the Flemish province of East Flanders to the east, the Walloon province of Hainaut in the southeast and the French department of Nord-Pas-de-Calais to the west. Its capital is Bruges. Other important cities are Courtrai in the south, Ostend on the coast, Roeselare and Ypres.

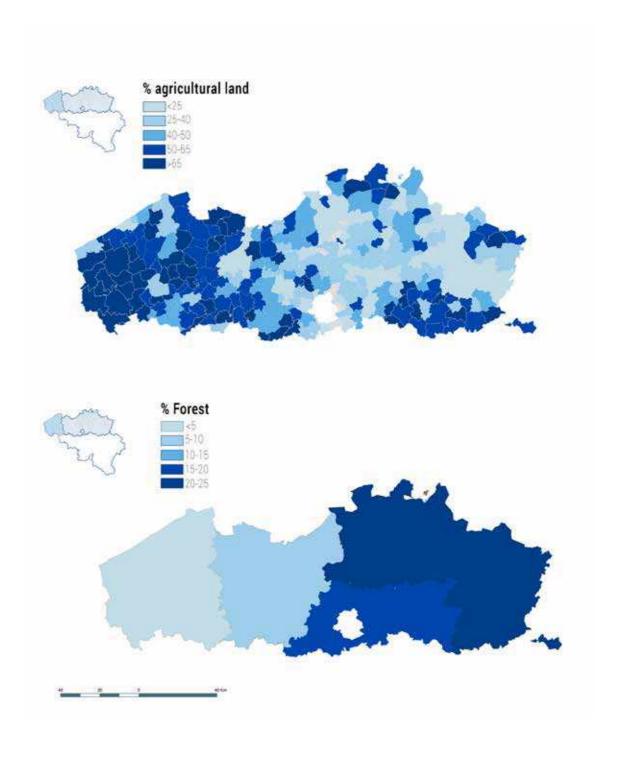
Largely due to good soil conditions, West Flanders is the province with the highest percentage of agricultural grounds in Belgium. In the province, agricultural land represents 63% of the total surface while the average in Belgium is 43%. However, the province has the lowest percentage of forests within Belgium, with only 3.4% of West Flanders covered by forest. This is only 1/4th of the average in Flanders and 1/7th of the Belgian average. Most of the forests within the province which still exist today are found on (former) rural estate grounds. The largest forest cluster in the province can be found south of Bruges where multiple rural estates transformed heathland into forests and arable land.

West Flanders is 3.197 km² in size and as such it covers roughly 10% of the nation's surface. It has approximately 1,2 million inhabitants and a population density of 380 inh/km². The population is spread heterogeneously with the highest densities of more than 1000 inh/km² around the economic centers in the South-East (Kortrijk, Roeselare) or the center cities (Bruges and Ostend) and with densities dropping to 50 inh/km² in rural areas in the West of the province. West Flanders' population is growing at half the rate of the national average. However, some municipalities in the West of the province are faced with a slow decline.

West Flanders receives one out of four tourist arrivals in Belgium due to its two unique features: the coastline and the city of Bruges. The 'Westhoek' near the French boarder is the most popular rural tourist destination and this is linked to the different World War heritage sites in the area. Attracting more tourists to the other parts of rural West Flanders is one of the current priorities for Westtoer, the tourism office of the province. Events such as the year of the 'castles and abbeys', organized in 2017 in the rural region around Bruges, fit within this priority.

The provincial government is seated in Bruges and is the intermediate governmental level in between Flanders and the different municipalities. From this position they support the other governmental levels, are responsible for supra local matters and initiate regional cooperation and development. Although heritage policy is mainly a Flemish and municipal competence, the province develops its own heritage strategy through its heritage service and is for example responsible for 'monuments watch'.





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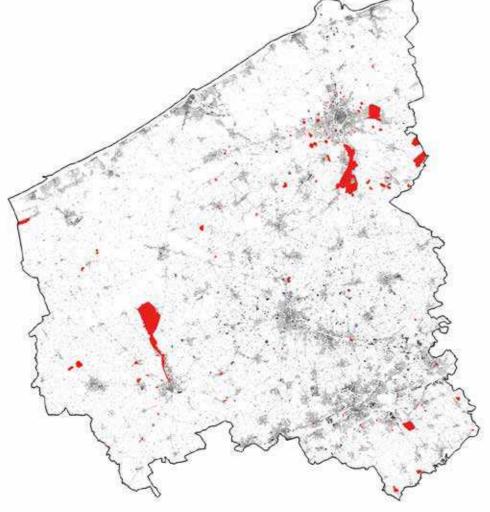
## 6.2 RURAL ESTATES IN THE REGION

West Flanders has a rich variety of rural estates. Some estates have a history of at least 1000 years and a current size of more than 300 ha, including the garden or park with buildings, ponds, tree lined alleys, farming grounds, forests and nature. Others are just a few hectares and are built in the middle of the 20th century. Larger domains with sizes between 100 and 600 hectares were once more common. However, increasing urbanization and sharing-out of the estates reduced their size tremendously and today an average site between 5 and 50 ha is more common. As rural estates functioned as multifunctional rural enterprises, these changes undermine their financial viability. Moreover, it blurs their ecological, spatial and cultural historical connections with the surrounding landscape.

## <u>IDENTIFICATION</u>

There is no simple method to estimate the number of rural estates in West Flanders. As a starting point we use the combined inventory of built heritage, archeological heritage, landscapes and boats of the Flanders Heritage Agency (AOE). This inventory identifies a diversity of heritage objects throughout Flanders. Rural estates are part of this inventory, but have no specific typology within it. 'Castle domain' (kasteeldomein) is the closest typology to what we understand as rural estate. According the inventory there are only 11 'castle domains' in West Flanders while a study from 2008 for example reveals roughly 100 domains around the City of Bruges. These domains can however be identified using other typologies related to castles such as 'castle farm' (kasteelhoeven) for example. Using the term 'kasteel' or 'landhuis' to search the typologies reveals 1580 items for Flanders of which 392 are found in West Flanders. For Flanders 45% of these items is protected within the heritage inventory. Big differences exist between regions: while an average of 62% is protected in Limburg, within West Flanders this is less than 30%. A reason for these large differences between regions could be the 40 year timespan between start and finish of the first inventarisation process and consequent changed view towards protection. The largest part of West-Flanders was addressed at the end of the process. Certain rural estates have their buildings protected, others have their garden or park protected, others are part of a protected landscape and others are consolidated, as a step prior to protection (explained more in detail below).

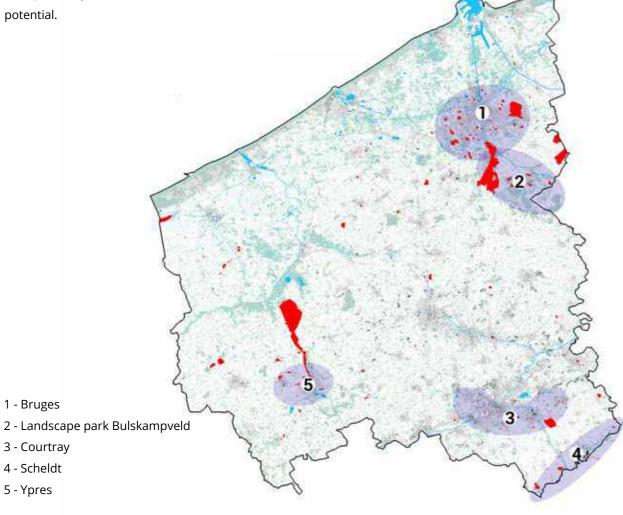
A closer look to the 392 identified items within West Flanders reveals several challenges. First, certain rural estates are identified multiple times because they have a separate protection for different elements of the rural estates, e.g. a separate protection for the gatehouse and the castle. These cannot be linked automatically. For West Flanders we have isolated these doubles by comparing names and addresses. This enabled us to eliminate 40 items. A second problem lies in the correct use of the heritage typologies. The Learning Case 'Wildenburg' for example cannot be found using a typology referring to rural estates. We encountered five similar situations. Similarly, certain items which are indicated as 'kasteelwoning' are actually farmsteads or nobility houses in city centers which do not fit the project's definition of rural estates. Looking into this issue decreased the number 352 to 300 items. A third challenge is the fact that certain items within the inventory refer to rural estates who have disappeared a long time ago. Sometimes only the name refers to the historical origin of the site, sometimes only parts of the park or certain built structures remain. We isolated 65 of the 300 items containing the words 'former estate', 'the disappeared castle'. Concluding, 235 rural estates are still existing in West Flanders today and at least 300 areas still have certain rural estate qualities.



## **CLUSTERS**

Rural estates are spread heterogeneously in West Flanders, with large clusters around the bigger historical cities or rivers. We currently identified 5 large clusters but more detailed research will be necessary to explore this further. In the 90 km² region of the Landscape park Bulskampveld an estate density of roughly 4 times higher than the regional's average can be found. At least 35% of the regions landscape has been highly influenced by the rural estates resulting in a landscape appreciated for it's recreational, historical, natural and aesthetical value.

Numerous smaller clusters of 3 to 5 estates are located on the border of municipalities and along historical roads. Although they do not have the same regional impact as the larger clusters, their proximity and small scale holds specific



## PUBLIC AND PRIVATE

In contrast to the tangible influence of rural estates on the rural landscape, there is the relative invisibility of their core element: the park and castle. These are most often enclosed by evergreen borders and function as hidden islands within the landscape.

Most rural estates in West Flanders are privately owned and managed. In the cluster Landscape park Bulskampveld for example 75% of the rural estates are used as private residence or office. Although almost all of these estates take up an informal social role, there is no tradition or legal incentive to make these privately owned rural estates publicly accessible on a structural basis. In the past the provincial government acquired several rural estates. Today these estates make up half of the provincial domains in West Flanders. In these situations, the park is publically accessible and the buildings function either as a visitor centre, provincial offices or a privately managed restaurant. Less than 5% of all rural estates in West Flanders house a museum.



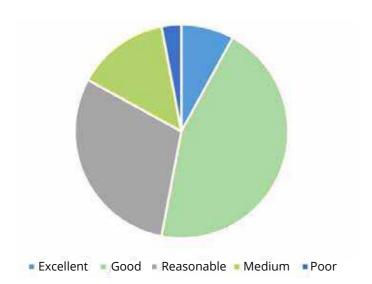
Potential clusters of rural estates in West Flanders with an above local potential.

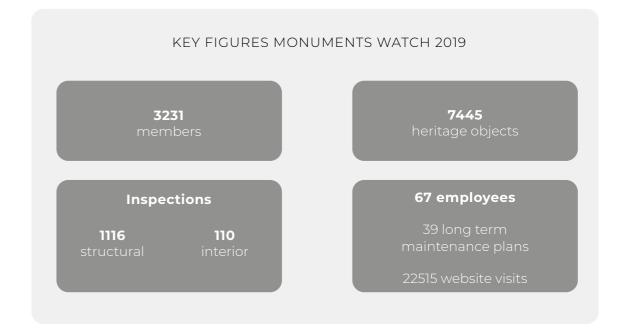
## CONDITION

The heritage monitor of the Flanders Heritage Agency presents data about heritage and heritage care in Flanders. It uses a fixed set of indicators organized according to four themes: heritage status, heritage financing, heritage management and heritage actors. The information collected within the monitor is directly linked to the different instruments within the decree (number of accepted funding applications, number of management plans, allocated overall funding,...). It does not collect general information on the heritage in Flanders such as the general condition, the use or type of owner. It furthermore only shows information on heritage in general without making a distinction between types of heritage. As rural estates cannot be isolated this monitor is not suited to collect detailed information on rural estates.

Monuments Watch is a non-profit organization founded in 1991 and has the objective to stimulate the correct maintenance of valuable historic heritage. This member based organization is supported by the government.

As one of its core tasks the organization inspects heritage objects and collects information on its condition, regardless of the legal structure of the owner or the protection status of the property. In 2019 7337 heritage objects were inscribed on the list of Monuments Watch out of which 4923 had a heritage protected status. This represents 40% of the protected heritage in Flanders. The typological division used by Monuments Watch does not coincide with the division by the AOE. The owner is for example responsible to indicate the type of heritage for which he starts a membership and as such this can be different then the type used by the AOE. Within the list of Monuments Watch a bit more than 5% of these objects is directly linked to a rural estate an only 3,8% (277 objects) had a maintenance check since the system updated in 2018. As one estate can be inscribed within monuments watch with numerous objects (castle, stables,...), these 277 objects are only linked to 142 rural estates across Flanders. 14 Are found in West Flanders. From these 277 objects 53% is in good to excellent condition.





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## 6.3 STAKEHOLDERS

This diagram represents the most relevant stakeholders regarding the theme of rural estates in relation to the Decree of Immovable Heritage. It is a non-exhaustive representation trying to capture the diversity within the field and their most basic connections in a power-interest diagram. The vertical axis indicates the influence a stakeholder has on the decree and the horizontal axis represents how much it is influenced by the decree. This diagram is initiated by a 'stakeholder mapping' workshop executed with the Innocastle partners and was complemented through a growing insight in the different stakeholders in the course of the project.

#### **Owners**

The contacts of estate owners with the Flanders Heritage Agency (AOE) differs depending on the protection status of their site. Owners of a protected heritage site are in contact with the AOE on a regular basis for different matters such as the development of a management plan, the possible yearly maintenance premiums or the advice during a redevelopment process. Rural estate owners of estates which are not protected have almost no contact with the AOE.

### **Advisory boards**

The VCOE (Flemish Commission on Heritage Commission) and the SARO (Strategical Advisory Board for Spatial Planning) are two advisory bodies imbedded within the structure of the Flemish Decree of Immovable Heritage. As different stakeholders are member of these advisory bodies, they can influence the well-functioning of the instrument. These links are indicated on the diagram.

#### Herita

HERITA is a non-profit organization within the heritage sector. It originated in 2012 when three organizations merged together. Its origin lies within the Flemish government and it is structurally supported through the Flemish Decree of Immovable Heritage. The organization has three objectives: to increase the public support for heritage, strengthen the heritage sector and the management and development of specific heritage sites.

#### Non-profit

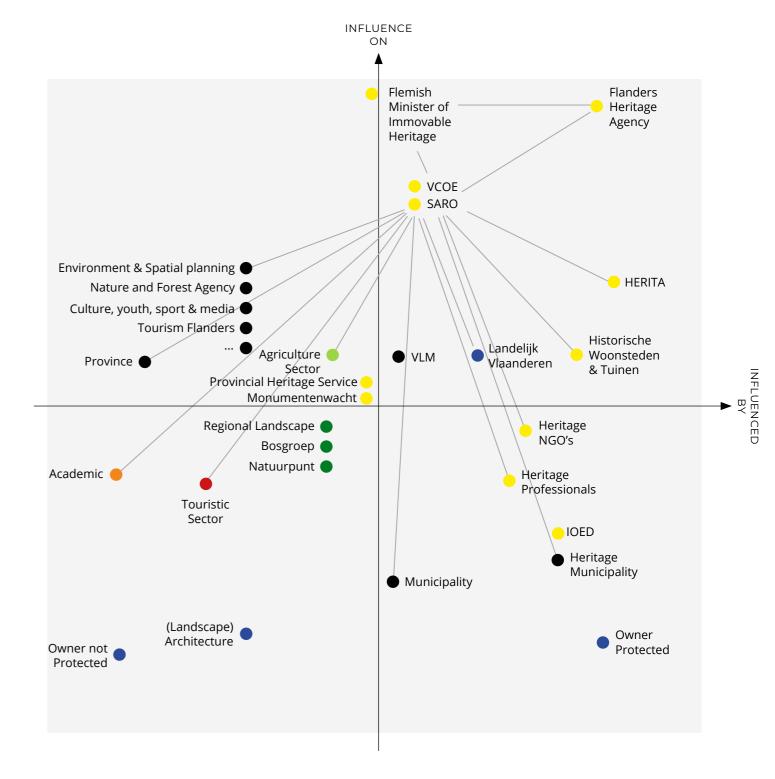
'Landelijk Vlaanderen' and 'Historische Woonsteden & Tuinen' are two important nonprofit organizations which support rural estates owners.

#### **Provinces**

The provinces have limited competences in relation to the Decree as the Decree puts more focus directly on the autonomy of municipalities. They however have their own heritage policy and are responsible for the Monuments Watch organization.

#### Municipalities

Municipalities have certain responsibilities within the Flemish heritage policy. Municipalities can join forces by creating an inter-municipal cooperation called 'IOED' (intercommunal heritage service). An 'IOED' receives support through the Flemish Decree of Immovable Heritage to help the municipalities with vision forming, formulating advices and so on. Municipalities which have a well-developed heritage policy can ask to take on certain responsibilities from the Flemish level and they receive financial support for this. They become a 'Heritage Municipality' and they can have a larger influence on the heritage policy within the boundaries of their municipality.



- General Governance
- Heritage
- Academia & Education
- Culture & Sport
- Landscape & Nature
- Agriculture
- Real Estate
- Infrastructure
- Other

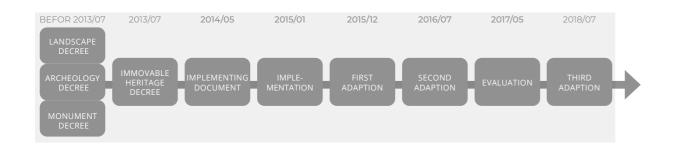
## 6.4 TARGET POLICY INSTRUMENT

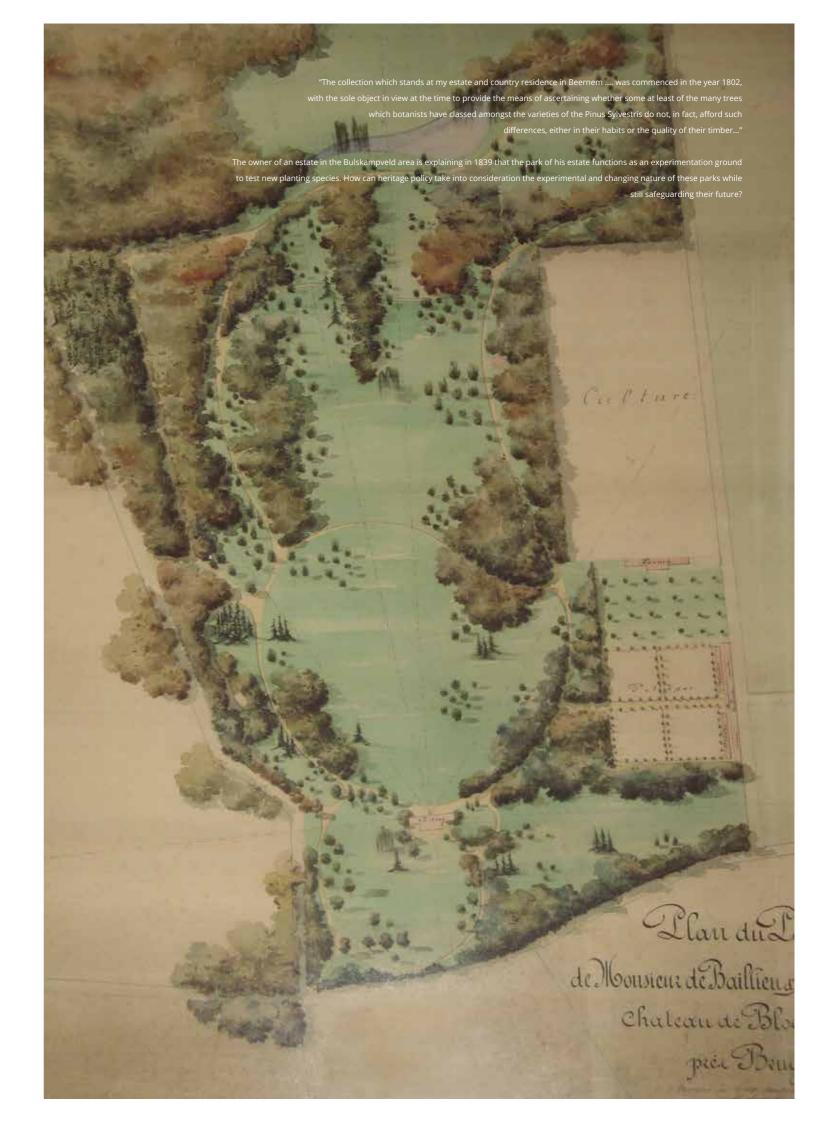
As heritage is a regional competence in Belgium, the Flemish Decree of Immovable Heritage is managed and upheld by the Flanders Heritage Agency (AOE). Lower bodies such as the provinces and municipalities are free to develop supplementary heritage policies. These must fit within the binding stipulations of the overarching policy instrument.

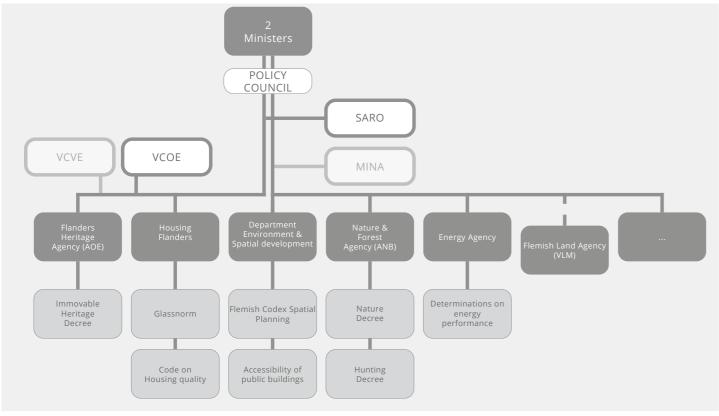
## ORGANIZATIONAL STRUCTURE

The Flemish Decree of Immovable Heritage is the first decree dealing with all types of immovable heritage. As such it replaces the previous, typologically oriented, heritage decrees in an attempt to harmonize the existing fragmented laws and premium systems. From its outset and as the name suggests, the agency and its decree do not deal with movable or intangible heritage. This falls within the policy domain 'culture, youth, sport and media' (CJSM).

The AOE is part of the policy domain Environment and Spatial Development. It is an independent agency advising the minister on the development of the government's five year policy program on immovable heritage. Moreover, it is responsible for the execution of the program and for the implementation of the Decree of Immovable Heritage. The agency itself is connected to several advisory bodies of which the SARO and VCOE are the most relevant in the Innocastle context. SARO is the strategical advisory board on spatial planning and heritage advising the minister on strategical matters on policy execution and development. The VCOE is the Flemish commission on immovable heritage, advising on matters such as the inventory and protection dossiers. These two bodies have experts and civil society organizations as members.







Policy domain environment & spatial development

# THREE APPROACHES TO HERITAGE

The introductory chapters to the Flemish Decree of Immovable Heritage, the explanatory notes, the policy notes, the decree itself, the decrees resolution and several other publications reveal three approaches towards heritage.

### **Holistic approach**

First a holistic approach to heritage is being promoted, with a focus on the context and the surrounding landscapes. Several elements within the decree initiate and stimulate this holistic approach, with a resurging interest in the landscapes of Flanders as a consequence. The landscape policy of the AOE ranges from the identification of unique 'cultural historical landscapes' to the search how to identify the characteristics of different Flemish landscapes. While the first is a typical heritage oriented approach, the latter is a qualitative oriented approach which includes contemporary or

everyday landscapes. The instrument of 'heritage landscape', moreover positions heritage elements within an ever evolving spatial context. The responsibility of the AOE for the 'European Landscape Convention' certainly gives a boost to this evolution.

### **Cross-sectoral approach**

Understanding heritage holistically automatically results in the need for a cross-sectoral approach. The decree explicitly pleas for cross-sectoral connections between the heritage policy and other policy domains. For example in order to increase development possibilities for protected heritage, they can be excluded from specific spatial planning rules if this is supported by the AOE. Spatial implementation plans (RUP) can impose specific stipulations to preserve heritage values within a specific area (for both protected and unprotected elements) or can indicate protected 'heritage landscapes'. Also, the

AOE together with the Nature and Forest Agency developed the possibility for owners to create an integrated management plan. It aligns the goals and premiums set for a specific site in relation to heritage, nature and its forests. Although thorough interaction is still a work in progress, these transversal alignments are proving very important for rural estates. As these are characterized by their diversity and complexity, rural estates benefit from harmonizing different policy sectors.

## Participative approach

The participative approach is the third approach towards heritage in the decree. It is believed that a shared responsibility towards heritage within a community will increase the general engagement towards heritage. As such the AOE is actively stimulating a strong heritage community in which they engage as a steadfast partner. Within the decree structural funding is for example made available for heritage organizations, municipalities can demand a heritage label giving them a certain autonomy and the possibility for 'Intercommunal Immovable Heritage Offices' is created. Most significantly is the shift of the responsibility for the development of an inventory from the

Flemish to the local level giving the different local communities a certain autonomy about the identification of their heritage.

It is obvious that these three approaches intertwine within the decree and that efforts to approach heritage holistically are not possible without creating cross-sectoral connections or understanding how all the stakeholders approach heritage. The 'Immovable Heritage Master Plan' is a newly introduced instrument within the decree and can be understood as the instrument most internalizing the three different approaches towards heritage. It is a holistic and transversally debated plan on a specific region or heritage topic. It's goal is to create an agreed vision and action plan between all stakeholders in the approach towards a specific heritage challenge. The actions can be directly connected to the different instruments within the heritage policy as well as to other policy domains. As such it is intended to activate the instruments of the different policy domains participating in the plan to solve a certain heritage related challenge. It is a process oriented instrument with a strong participatory element bringing together the different levels and organizations.

# THE DECREE'S PROTECTION METHODOLOGY

The protection policy of the AOE dates back to the beginning of the 20th century. In the Flemish Decree of Immovable Heritage, the protection strategy is organized in three steps. In a first step heritage objects in Flanders are identified by mapping them in type-specific inventories (buildings, landscapes, gardens & parks, archeological sites, city & village sights,...). These are scientific inventories without legal consequences and are generally accessible. As these inventories have recently become a competence of the municipalities, some of them started their re-evaluation. In a next step, specific inventoried heritage objects can be consolidated ('vastgesteld' in Dutch) by the minister. This must be understood as a first classification step with certain minor legal consequences which are primarily the responsibility of the municipalities. The AOE will not be consulted when changes are made to these consolidated heritage elements for example. In the third step certain of these consolidated elements can be stated as protected heritage. For these items, the AOE has to be consulted for a binding advice on building plans, for controlling the good execution of construction works, for subsidizing restauration or maintenance works and so on.

## **SWOT-ANALYSIS**

STRENGTH	WEAKNESS	OPPORTUNITY	THREAT
A holistic understanding of heritage with a specific sensitivity towards landscape and context.	The holistic potential of e.g. the ELC, Heritage direction plans and Heritage landscapes can be activated more.	Society and the government in general have a growing interest in a holistic and cross-sectoral approach	Saving measures in all departments cause a refocus towards the cor tasks and this hampers cross sectoral cooperati
A scientific inventory as solid base for the heritage policy.	The strong difference in the approach towards protected or 'consolidated' heritage can damage the holistic approach towards the landscape.	The Flemish government is working towards a cultural shift in all departments.	The trust between different stakeholders c still increase.
Connections to other policy domains are formally imbedded in the decree	The participative intentions and possibilities of the decree are not always / not yet activated.	A general understanding of the potential role of heritage in solving the large societal challenges of today is growing.	The dominance of the conservative view towar heritage can block inventiveness, experime and development.
A diversified financing system	The premium system focuses on the heritage related works and not the quality of the whole project.	The holistic approach of the ELC more and more invades in the approach of the AOE	Heritage is still mainly understood as limiting towards the possibilities within a landscape alread under pressure.
Heritage responsibilities are distributed to different governmental levels and external ngo's	Heritage laws underwent numerous changes. This has caused confusion.	Rural estates are understood as important heritage and are specifically mentioned in the Flemish Coalation agreement.	The transition of certain competences from regional to local level m cause loss of expertise

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## 6.5 LEARNING CASES AND CHALLENGES

# INTRODUCTION AND METHODOLOGY

During the Innocastle project, we focused on the cluster of rural estates in the Landscape Park Bulskampveld because of several reasons. Firstly, there is the close collaboration with the province of West Flanders and engagement of the regional development office for North-West Flanders to serve as a bridge between local and higher governments and stakeholders. Secondly the partnership Landscape Park Bulskampveld has been formalized by a charter strengthening the cooperation between several stakeholders. This cooperation is a good base to work on stakeholder involvement regarding to rural estates in the region and will also lead to the understanding of the value of such a charter. Thirdly working on different scales and cases in this specific region enables us to understand the regional impact of these domains on one hand and to puzzle out the management of rural estates in detail on the other hand. This supplements the inherent layered approach of Innocastle. Finally, this geographical focus ensures certain stakeholders can be consulted

for multiple learning cases, creating a strong and in depth connection and conception of the project.

In the first exploratory months of the project we had discussions with our regional partners and different key stakeholders. Following these contacts we started to understand the diversity in rural estates and the consequent diversity in challenges as well as the importance of the scale on which we would approach the Learning Cases. Together with our regional partners we discussed the different possible types of Learning Cases and in the second partner meeting of the project we were able to put this in an international perspective. These discussions eventually led to the decision to select a private case, a public case and a network of rural estates as a case as well as the selection of both protected and 'consolidated' cases.

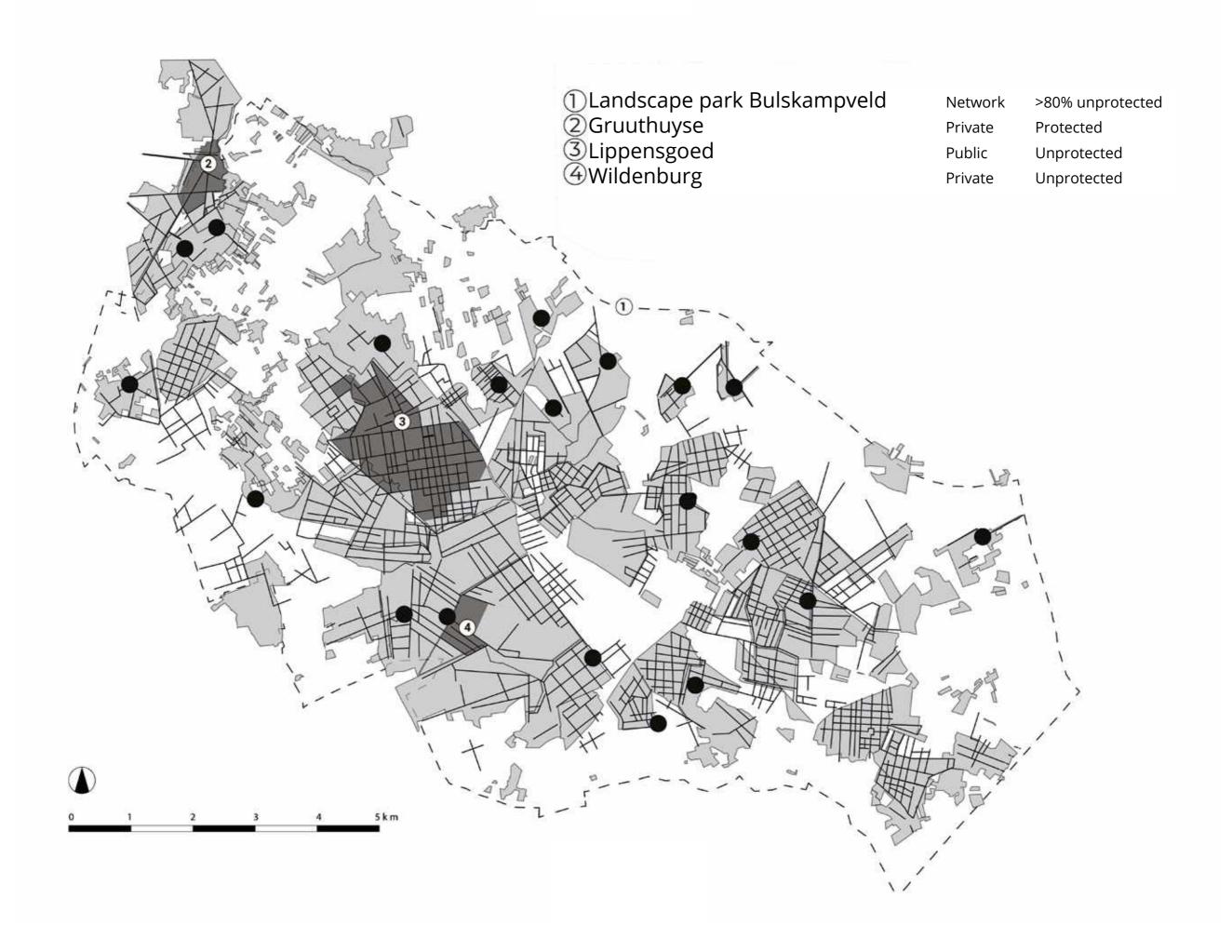
Furthermore, the selection of the learning cases was based on three qualitative criteria: the critical aspect, the representativeness and

the practicality of the case. The critical aspect reflects how explicit a particular phenomenon of interest is revealed. This criterion is particularly relevant when resources limit evaluation to a limited amount of cases. The clearer a point of interest is expressed in a learning case, the easier the development of knowledge. Taking into account the representativeness of a case in relation to the different rural estates in the region ensures the generalizability of the findings. Practicality refers to the feasibility of the rural estate to function as a Learning Case. While practicality is the least important criteria from a content point of view it can become a breaking point in the execution of the research. Therefore, it is important to consider elements such as the continued cooperation of the owner, the accessibility of the case, the possibility to function as a test-case for possible action plans,

To preselect the cases we inventoried all possible sites within the Landscape park Bulskampveld

and collected basic information such as heritage status, owner structure, function, contact persons, size and spatial planning data. That inventory formed the base to discuss the cases with the Flanders Heritage Agency and the regional office of the province of West Flanders. Within this discussion the different sites were evaluated in relation to the selection criteria. This eventually led to the preselection of four Learning Cases.

The selection process, selection criteria and the proposed Learning Cases where presented and discussed during the first stakeholder meeting. During this discussion it became clear that the Learning Cases cannot be understood separately and although we are interested in the four cases for different reasons it is the combination of cases which will give us the right insights. This means the work of one case will influence the work on another or that a combined workshop for example will lead to a better understanding of the difference between two cases.

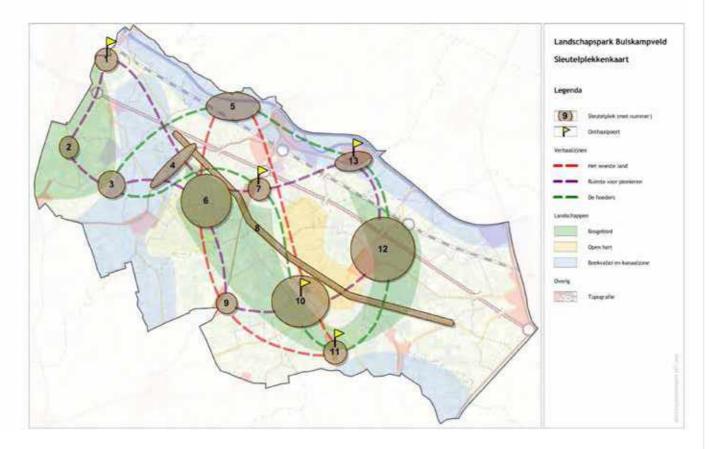


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# LEARNING CASE: LANDSCAPE PARK BULSKAMPVELD

- Region of 90 km<sup>2</sup>
- A complex mixture of municipalities, farming grounds, a provincial domain and large plots of nature owned by different institutions and private owners.
- It is a spatially fragmented region to work, live and recreate rich of forests, agriculture and heritage.
- Charter signed in 2011 and 2014 by 19 different organisation to develop the region.
   Different stakeholders are Regional office of West Flanders, different Flemish agencies such as AOE, the Nature and Forest Agency and the Flemish Land Agency (VLM), 5 municipalities and the different owners of the rural estates.



This map developed by 'The Missing Link' is part of a study commissioned by the province of West Flanders exploring the development strategy for the region. Seven of the thirteen focal points selected within the area are directly linked to the different rural estates within the region. As such it reveals the importance of rural estates for the region.

#### Introduction

The Landscape park Bulskampveld south of Bruges finds its roots in the 12th century when it was known under the name 'Bulnas Kampa'. It was a heathland used for grazing bull and farm fish in the many pounds in the region. New foresting techniques, urban growth, a drop in fish prices and a rise in wood prices led to its reclamation in the 18th and 19th century. This led to an exponential increase in rural estates in the area all interested in the economic development of the region. The most fertile land on the estate grounds was used as agricultural land and the rest was developed into forests. The specific patterns of tree lined alleys, forest and agricultural plots known as checkerboard pattern is still clearly visible today as well as the many estates, built by the families developing the region. This specific history led to a region rich in nature and heritage, with the largest forest area of West Flanders and a high density of rural estates as a huge potential.

Different actors have signed the 'Landscape park Bulskampveld' charter in 2011 and as such formalized their intent to develop the Landscape park Bulskampveld as an area of regional and touristic importance. This development is under way through works executed by the different municipalities, the regional office of West Flanders and the Flemish Land Agency (VLM) amongst others.

## **Learning opportunities**

Looking at the Landscape park
Bulskampveld in its totality reveals the
relationship between regional development and
preservation and development opportunities
of the 23 individual rural estates in the region.
As only 20% of the rural estates within the
region has a heritage protection it is interesting
to understand the implication of this and the
difference with the non-protected rural estates.

While this region is unique, the occurrence of a cluster of rural estates with a shared genesis is not. Estate 'belts' around major historical cities, strips in river valleys,... all have similar qualities, opportunities and challenges. The Landscape park Bulskampveld can be rewarding as a learning case to understand the regional potential of similar clusters in Flanders.

## LEARNING CASE: GRUUTHUYSE

- Size of the park 51 ha
- Privately owned, managed and used
- The estate is protected for its heritage and nature.
- Used as private residence and for family events, as well as farming and nature development.
- The main stakeholders are the family, the municipality of Oostkamp and the AOE.



#### Introduction

Gruuthuyse is one of the larger estates within the region of the Landscape Park Bulskampveld. It has been in possession of the family d'Ursel for centuries and is composed of all the traditional elements of a historical estate such as parkland with diverse buildings and planting, farming ground, forests etc. The Gruuthuyse estate has a unique park in good condition designed by the reknown landscape architect Henri Duchêne. It is one of the few cases within the region that has received a heritage protection.

Although the origin of the estate lies in the regional export rights of 'gruut' spices to the cities of Bruges and Ghent, land management has in the last 200 years been the most important income of this estate.

The estate is bordering the municipality of Oostkamp and forms, together with two other estates, a green buffer on the east side of the municipality. This influenced the development of the municipality in the second half of the 20th century resulting in a more concentrated urban structure.

Oostkamp has more than 15 rural estates within its boundaries and values the estates for their touristic-recreational potential. Within the vision document for urban planning of 2006, the municipality describes as a challenge the private character of the domains as well as the high costs for the owners. The document furthermore

states the need of a global vision towards the future of these domains.

The domain has two heritage protections.

The park and buildings are protected as a monument and bed and banks of the the streams running through the estate are protected as a cultural historical landscape. The estate is part of an indicated valuable landscape (landschapsatlasrelict in Dutch) and the largest part of the estate is protected as nature as well. As a consequence of this, the estate has a heritage as well as a nature management plan. It follows the guidelines of these plans and receives funding for it.

## **Learning opportunities**

This estate offers specific opportunities as a learning case because the family is currently investigating a wide range of possible futures for the estate. One option is the conversion of the main castle into apartments. To this regards, the status as protected heritage creates opportunities. Understanding diverse aspects which influence the redevelopment process can lead to valuable insights on other possible options for Gruuthuyse and rural estates in general. Interesting is also to learn how the Decree of Immovable Heritage, and in a broader sense the AOE and the municipality, can play an active role in this process.

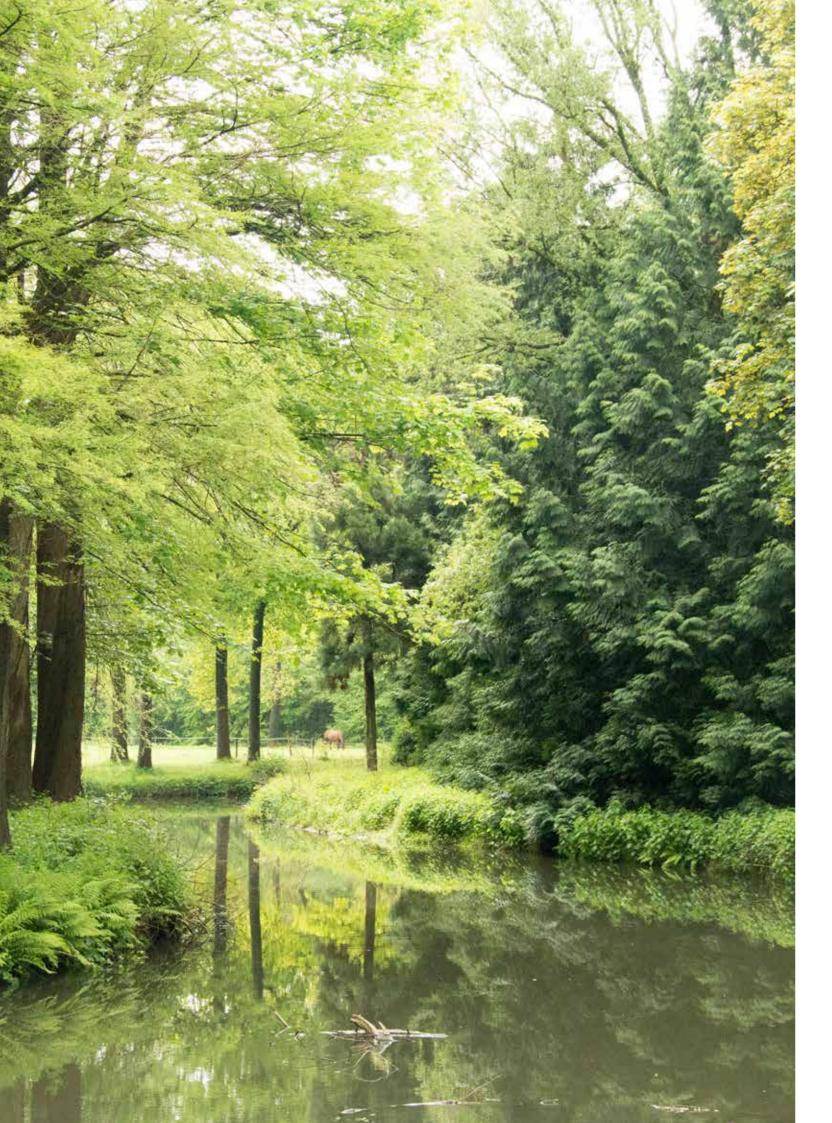
The geographical position of Gruuthuyse in relation to the municipality and its current redevelopment quest are representative for a lot of other rural estates in Flanders. As such this learning case will offer valuable information of how our target instrument can influence this process throughout Flanders' rural estates.

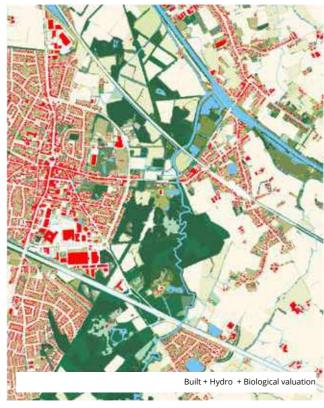


Oostkamp 1971



Oostkamp 2018







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## LEARNING CASE: LIPPENSGOED

- Size of the estate 324 ha.
- Publicly owned, managed and used. Multiple owners.
- The estate is consolidated as heritage and has a nature protection.
- The estate is partly used as the provincial domain 'Bulskampveld', it has a working farmstead, visitor centre, restaurant, nature development,...
- Stakeholders are the different institutions of the province, VLM, Nature and Forest Agency (ANB) and the general public



## Introduction

The estate is roughly situated in the center of the Landscape park Bulskampveld and originated out of a farmstead in the 18th century that slowly developed the heathland into agricultural land and forests. The current castle dates back to the end of the 19th century and the park to the beginning of the 20th century. The estate is by far the largest estate in the Landscape park Bulskampveld and it is the biggest rural estate in the Province of West Flanders as well. The largest part of the historical estate is owned by the province and used as a provincial domain open to the public. In 2001 the castle was enlarged with a modern construction to better accommodate the visitor center which is housed in the castle since 1980. The province transformed the former vegetable garden into one of the bigger spice gardens in Flanders and the connected buildings currently accommodate a birds center. The former farm of the castle is still active and is privately managed independent of the provincial domain. Within the forests of the domain a plot is used by an independent organization as spice-farm and shop. Nature development on the grounds of the estate has transformed certain parts back to the historical heathland. A watchtower is currently built at one of these nature reserves. The interaction of all these different elements holds a lot of potential which is not all activated today. At the same time it makes it one of the most complex rural estates in the region, holding a specific set of challenges.

## Learning opportunities

The organizational capacity and knowledge available for this publically owned domain is large and cannot be compared to privately owned domains. Different specialized departments of the province all support the development of this site and it is important to understand that this influences the challenges this domain faces. It would be interesting to get a better understanding of this.

The province has set nature, recreational and educational targets within the estate. It is interesting to understand how the heritage aspect influences these.

This rural estate furthermore functions as a gateway to the Landscape park Bulskampveld. Understanding how it works together with the other rural estates in the region is interesting to estimate its regional effect as well as the possibilities it creates for other estates in the region. This will be informative for several similar situations all over Flanders.







# LEARNING CASE: WILDENBURG

- Size of the park 27,8 ha.
- Privately managed, owned and used.
- The estate is consolidated as heritage
- It is used as private residence and for small scale agricultural activities
- Stakeholders are the owner, the municipality, a farmer, and some local organisations



#### Introduction

Wildenburg is a rural estate existing of a park of 27,8 ha with all the typical elements like a pond, an ice cellar, a walled garden, a historical planting structure and a forest. The sole remaining building is the former coach house / caretaker's house, now used as the private house of the owner. The main building has been demolished and there is no new construction erected in its place. The general layout and sightlines of the park that once directed towards the central building now lead towards an empty elevated platform.

The rural estate is surrounded by farming land and forests and is situated next to the township of Wildenburg. It is easily accessible and other rural estates lie in biking distance of the estate.

The Wildenburg estate is mainly used as private residence and does not generate a large income. Succession through heritage is uncertain and redevelopment interest from external partners is low.

Like 80% of the rural estates in the region of the Landscape Park Bulskampveld,
Wildenburg is consolidated as heritage. It is not part of a protected nature site. A spatial implementation plan (RUP) sets the boundaries for redevelopment. Current planning regulations allow the rebuilding of a single family house on the former foundations of the castle.

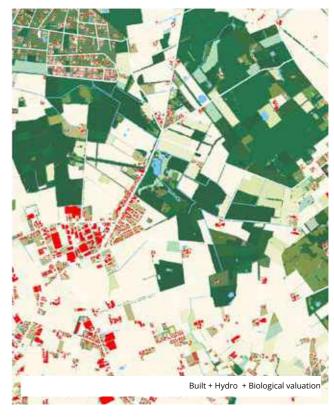
## Learning opportunities

At first glance the spatial implementation plan seems a logic though challenging redevelopment approach with an interesting tension towards heritage. However, it is interesting to question the choices made in the development of the planning regulations and to investigate if other options could have been valuable as well. Understanding how the different stakeholders perceive these regulations might add to this comprehension

Besides the absence of the main building, the Wildenburg estate can be viewed as representative. Given the regional land-use plan the rural estate is situated in a park area, as is up to 60% of estates around Brugge.

Exploring valuable futures for the estate which are beneficial for both the owner, the different stakeholders and society will give insights in the redevelopment strategies and possibilities of rural estates in general. As the main building has disappeared, it could be specifically interesting to focus on the redevelopment possibilities through the activation of the green heritage.







## 6.6 TOWARDS AN ACTION PLAN

Through stakeholder meetings, as well as different visits to the learning cases and interviews with owners, managers and key professional stakeholders, we developed a better understanding of the challenges that can play a role in the development of an action plan.

The challenges are divided into three different groups.

Each of the three groups of challenges need a different approach and bring different possible advantages and disadvantages.

Most of the challenges related to the 'operational level' of the decree are clearly demarcated challenges and progress on these challenges will have a direct impact on rural estates. The development of a template or guide for heritage management plans specifically targeting rural estates could already have an influence for example. This impact will however be limited to the rural estates it reaches i.e. the protected sites in need of a management plan.

The challenges related to the structural level of the decree question the core of the decree and its approach to heritage. While there is no direct answer to these questions, they are important for long term policy development. Rural estates are interesting cases as they often make these questions explicit. Exploring for example how to value, manage and subsidize a tree-lined alley which starts on a protected estate but continues beyond its borders, can reveal new directions in our approach to protected and unprotected heritage.

The general challenges are complex, involve multiple sectors and instruments and have a certain societal nature. Solutions can only be found through cross-sectoral cooperation and joint experimentation. Because of their inherent multifunctionality, size and complexity, rural estates can be valuable experimentation grounds to explore solutions for these challenges. An example is the learning case Wildenburg which functioned as a living lab within the project. The living lab introduced an innovative food producing layer in the historical park of the estate and as such revealed amongst others the difference in approach between the sectors involved.

The decree is a fairly young instrument and it underwent its first changes in 2015,2016 and 2018. A focus on the capacities of the decree in relation to rural estates might be a good strategy for the local action plan. This ensures a certain legislative stability and explores or reveals the possibilities within that legislation in relation to rural estates. A first possibility could be to test the potential of certain instruments within the decree in relation to rural estates. A second possibility could be to focus on frameworks and networks that support the good functioning of the decree, as well as the development possibilities of rural estates.

		There is no clear understanding or definition on what a rural estate is.
		Succession laws make it difficult to keep the rural estate unified.
		The different stakeholders are sometimes too much focused on their specific sector and not on the interaction of it with other sectors
		The spatial context of rural estates is changing fast due to urban pressure. This can damage the value of the estate.
GENERAL CHALLENGES		There is a lack of a connection between the indirect benefits rural estates generate and the direct costs they have.
		The societal value / potential of rural estates is not always understood and the perception of these estates is strongly connected to the role they had in the past. This can hinder innovative and participative development.
		The potential of rural estates is rarely connected to larger developments or networks of estates.
		The green heritage connected to the rural estates is under pressure due to changing context, intensive farming, nature development efforts, climate changes, urban pressure and so forth.
	Structural	The split between immovable, movable and intangible heritage creates challenges.
		The premium system focuses on the heritage related works and not on the quality of the whole project. As such rural estates are not always approached holistically by the AOE.
		The premium rate is not connected to the objectives set by the owner or the capacities of the owner.
		The strong difference in the approach towards protected or 'consolidated' heritage and their context, hinders the holistic approach towards the landscape.
CHALLENGES	Operational	The holistic potential of e.g. the ELC, Heritage management plans and Heritage landscapes can be activated more.
RELATED TO THE DECREE OF IMMOVABLE HERITAGE.		Heritage laws underwent numerous changes. This caused confusion.
		The legislation is perceived as complex.
		The assigned heritage agent works closely together with the owner of a protected site. If this cooperation is not working well, the owner cannot ask for a second opinion or mediator.
		The heritage management plan is a good instrument but its built up is not always suitable or fit for rural estates.
		The special premium (restauration) has waiting lists of several years.
	I	Lack of publicly communicated assessment guidelines and



## 7.1 INTRODUCTION TO THE REGION

Badajoz province, bordered by Portugal to the west, is the largest Spanish province (21.766 km²) with a total population of 673,559 inhabitants and an average density of 30,94 inh./km² (2019). Together with Cáceres, both provinces make up Extremadura Region (Autonomous Community), covering an area of 41,634km² - roughly 8% of the whole surface of the country. Most services and administrative offices are concentrated in Badajoz (the provincial capital) and Mérida (the regional administrative capital).

Extremadura is quite close to the cities of Seville, Lisbon and Madrid. This geostrategic location constitutes an advantage that has not been exploited to its fullest potential so far, although there are already some efforts placed in this regard. The density of the population is one of the lowest in the country and it is irregularly spread across the region. Nearly 30% of the inhabitants are concentrated in the cities of Badajoz, Cáceres and Mérida and, therefore, Extremadura can be considered predominantly rural. The average age of the population is 44 years old and demographic trends show an increasingly aging population. This phenomenon is aggravated by migration movements to more urban territories in Spain.



## ECONOMY

Despite recent recovery signs from the financial crisis, the economy is lagging in contrast with the rest of the country, and its Research, Development and Innovation system is among the least developed in Spain. Badajoz province, together with the rest of Extremadura is the only Spanish region categorised as less developed by the European Commission.

According to a national-wide comparative analysis about territorial competitiveness (digital connectivity, economic dynamism, physical structure, governability, R&D, positioning, labour market, fiscal and financial, social, environmental sustainability), Badajoz province ranked on the 32 position among the 50 Spanish provinces. In 2017 the gross domestic product (GDP) in Extremadura reached €18.8b (€ 17,6b in Badajoz province), the highest since 2010, yet it continues to be one of the poorest regions in Spain (Eurostat, 2019). The average income of €19,475 (INE, 2019) is, in fact, the lowest within the country. According to Eurostat, the latest available figure for GDP per capita in purchasing power standards (PPS) was 19,300 in 2017, a figure which has been slowly increasing since 2013 (16,600). This ranks Extremadura in the last position among the 17 Spanish autonomous communities, below both the national (27,600) and (30,000) EU averages (Eurostat, 2019). The main component of the regional gross value added (GVA) is the tertiary sector; accounting for 69.2% of the total, followed by the secondary sector responsible for 22.0% (of which construction constitutes 7.4%) and finally, the primary sector that represents 8.9%. Unlike the national trend, the primary sector holds a significant weight in the economy of Extremadura while services are slightly behind of the figures seen in the rest of the country (Eurostat, 2019). Two of the most important rivers in Spain (Tagus and Guadiana) cross the

territory of the region making it very productive for agriculture. In consequence, the regional products have a high-quality and therefore, the activities related in any aspect to this sector enjoy greater importance than in other parts of Spain. For instance, Extremadura is still one of the biggest producers of tobacco. Industry is also influenced by the relevance of agriculture as the majority of activities performed are linked to it. In the same sense and thanks to its climate conditions; the renewable energy is remarkable with photovoltaic energy standing out. Accordingly, it can be concluded then that Extremadura's economy relies greatly on its natural resources. With regard to the service sector; the non-market services are to be highlighted as they account for almost 27.2% of the GVA.

The dispersed and aging population has contributed to develop a very efficient network of health, education and administrative infrastructure. In fact, the social services in Extremadura are used as a model of good practise for regions showing similar characteristics. Tourism is also gaining prominence thanks to the natural and historical heritage, and the free software is among the key segments of the regional Information and Communication Technologies (ICT). According to INE (2019), the active population during 2018 was 378.9 thousand people (1.96% of the national employment), with the Services sector standing out from the other sectors with 71.91% of the regional total, with the secondary sector (Industry including Construction) totalling 14.49%, while the primary sector accounted for 13.61%. However, unemployment is one of the biggest challenges faced by Extremadura. In 2018 the rate was 23.7% (117,300 people), of which youth and women are the most affected segments of the population. This figure is way above the national and EU average of 15.3% and 6.9%, respectively (Eurostat, 2019).

# LANDSCAPE AND AGRICULTURE

The climate in Badajoz is characterized by long, hot, dry summers and the province shows a contrasting Mediterranean landscape. It combines pastures with cleared oak woods (Dehesa ecosystem), irrigated crops, rolling hills and mountains. Most of the terrain is flat along the Guadiana river basin, but rises in the south and southwest near the Sierra Morena mountain range, and in the northeast where the foothills of the mountains of Toledo start. Badajoz is crossed from east to west by the Guadiana River. The Barros plain is typifying the wider central plain of Badajoz. It is the largest cereal-, wine-, and oil-producing region of Extremadura and its main centre is Almendralejo. Other regions in the province produce wool and extensive livestock raising is an important activity. The industry is concentrated in Badajoz city, Mérida, Almendralejo, and Villanueva de la Serena and primarily comprises agricultural processing industries.

## **POTENTIALS**

Extremadura has many potentialities.
Renowned for its environmental biodiversity;
there are some famous traditional food products
such as "jamón ibérico" (pork cured meat),
cheese and olive oil produced in the region.
Furthermore, it has a beautiful landscape where
the "Dehesa" (meadows) stands out, and a rich
historic heritage. Both features are the pillars
of the incipient touristic sector focused on the
quality of life, health and wellbeing of the tourist,
integrating an enjoyable rural and eco-friendly
experience.

Visitors will find castles, Arab citadels, outstanding Roman ruins and historic Jewish quarters, as well as the chance to explore historical routes such as the Mudejar Route.

Places of interest include the historical quarters of towns such as Alburquerque, Jerez de los Caballeros, Olivenza and Zafra, and particularly the capital, Merida, whose Archaeological Site has been awarded the World Heritage designation by the UNESCO.

# 7.2 RURAL ESTATES IN THE REGION

An important portion of the Spanish heritage connected with Castles is indicated at the Web owned by the "Asociación Española de Amigos de los Castillos" (Spanish Association of Friends of Castles). At national level, a number of 10.378 heritage assets related to castles and defensive elements (castles, fortified sites, towers, defensive walls, etc.) have been recorded by this Association. In the case of Badajoz province, 174 assets are registered.

In addition to this heritage catalogue, and speaking of rural estates not directly related to Castles, Badajoz province also has a large number of historical rural houses, mostly private, usually located at the countryside and built into agriculture or livestock farms and properties. No official list has been elaborated identifying this unique category. Since ownership is still private and these houses are not publically protected, maintenance depends exclusively on the ownership. Despite of being private, some limitations or regulations might be applied when restoring or when the expansion of the building is planned, mostly due to environmental general policies.

If we compare these historic houses with the manors observed during the project visit to the Netherlands or Romania, for instance, there is not much in common. Historic country houses in Extremadura region are generally more "humble" as they were used in the past for employee's accommodation or for short stays of the land owners, related to hunting, supervision of agriculture operations, etc.

Taking all this into account and for the case of Badajoz province, the concept of rural estates to be used in this report will refers only to castles, rather than other patrimonial assets, such as manors, historic gardens, palaces, even though some of them have defensive elements into their structures. The lack of official data from these assets and the availability of some registers referring only to Castles force this decision.

Filtering by "Medieval Military Castle" and "Medieval and Palatial Castle" in the above mentioned website gives a result of 66 historical castles.

Although there are some castles built in Badajoz province before the 12th century as well after the 16th, most of the catalogued historical assets belongs to the period from 13th to 15th century. The region of Extremadura was a frontier territory in a state of war until the "Christian reconquest" against Muslims was finalized, up to middle of the 13th century. During the Christian conquering period, castles were predominantly built aiming to have a protective and defensive role, so strategic positions (highest enclaves and broadest horizons) determined the site selection for the castle building. This is the main reason why the region's orography could partially explain the castle location and distribution across the territory during this period of history.



Municipalities

Private

Other Public Institutions

Under investigation

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From the 13th century, castles still pursuing defensive function, started to evolve towards manor or residential houses of the richest and more powerful families. Other reasons than military or defensive were replacing the motivation when locating the new castles. Economic activity and strategic national and regional routes determined the sites selected for building castles in this period.

Through data analysing from the 66 castles, 33% of the rural estates can be found on the higher grounds of city and village centres and 67% outside municipal boarders or in more rural areas on strategical positions. Roughly 60% of the analysed sites is, except for the build or walled land, not tied to any land at all. The 40% remaining sites are mainly connected to nature development.

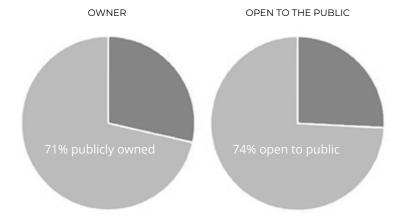
The largest part of the castles is publically owned and this is in direct relationship with their accessibility as well as with the function of the building. 33% of the privately owned estates are (in some way) open to the public as well.

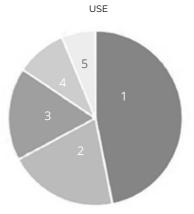
More than half of the castles are in poor condition and this is in 87% due to the lack of a function. Most of these are publically owned and some of them are in a ruinous state. These are all open to the public, but this is due more to a lack of management than to an active policy. We are not sure at this moment about the reason why these domains are publicly owned, but political decisions taken into a period of socialist governments influenced this factor definitively. Social movements also demanded the expropriation of different castles from private hands to be owned either by the municipalities or regional governments.

The average distance between two castles is 23km in the region. Certainly in specific regions (such as the South-West of Badajoz) in which the domains are spread homogeneously throughout the region this distance is lower and can be overcome easily.

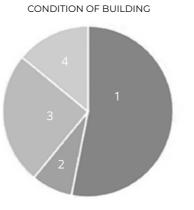
Although only 33% lies directly within a city or municipality an extra 40% directly boarders the municipality. Over 70% has a direct (potential) connection with the centre of a municipality.

The castles have potential if their relationship with the municipalities can be activated and if the often ruinous state can be used as an advantage in their redevelopment.

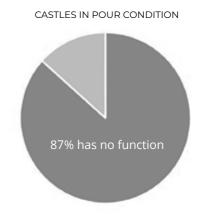


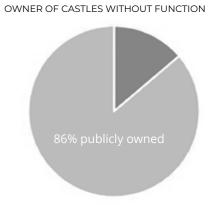


1 No function 47% 2 Tourism 20% 3 Private residence 17% 4 Public function 10% 5 Other 6%









## 7.3 STAKEHOLDERS

This diagram represents the most relevant stakeholders regarding the promoting and protection of cultural heritage and the management of castles and manors in the Region of Extremadura, of which the province of Badajoz is a part, connected to ERDF funds. It is a non-exhaustive representation trying to capture the diversity within the field and their most basic connections in a power-interest diagram. The vertical axis indicates the influence a stakeholder has on the use of ERDF funds and the horizontal axis represents how much it is influenced by the ERDF OP Program

### **Public Managing Authorities**

The Regional Government of Extremadura has the competence for ERDF management in the Region through the DG for Funds, as well as the competence for the promotion and protection of the cultural and natural heritage through the DG for Culture and DG for Tourism.

### Other Public Authorities:

The Province of Badajoz and the Province of Caceres (Diputación) can influence the programming of ERDF funds and can use ERDF funds for heritage promotion and protection in the provinces of Badajoz and Caceres.

Municipalities can use ERDF funds (assigned by the Regional Government or the Provinces) to promote or protect heritage assets in their territories.

Mancomunidades (Association of municipalities, Operational bodies), act as representatives of their associated municipalities for the implementation of programs or the promotion of projects for heritage promotion affecting one or more of such municipalities

Local Action Groups (Operational bodies)
receive ERDF funds from the Province for the
implementation of programs towards the
promotion of cultural heritage at county level.
REDEX is the Regional Association of Local Action
Groups

### **Other Public Organisations**

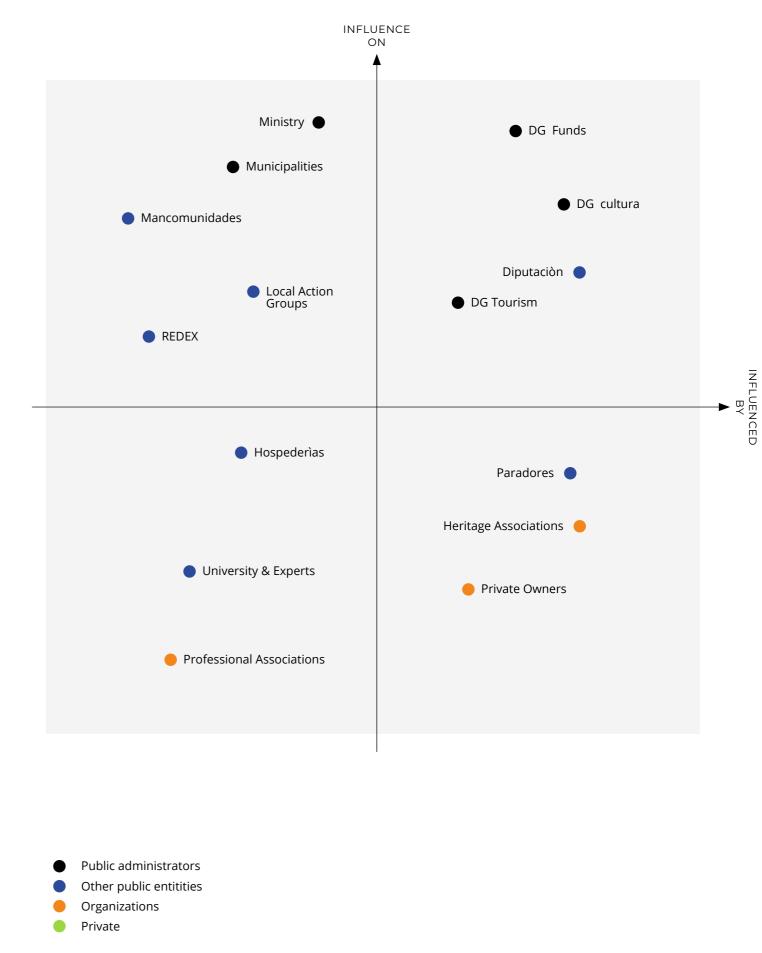
Paradores and Hospederias are a National and Regional Network of heritage sites and buildings used as high standard hotels following a private management model. They are responsible for maintenance.

The University of Extremadura is an advising stakholder in heritage projects and this towards the different authorities.

### **Other Private Entitities**

Heritage Associations such as the Spanish Association of friends of the Castles promote the study and preservation of the cultural heritage and professional associations connected to historic buildings, history, landscape, etc... implement technical studies for the promotion of the heritage

Private owners of castles and manors are very much affected by the different policies but their influence is very limited.



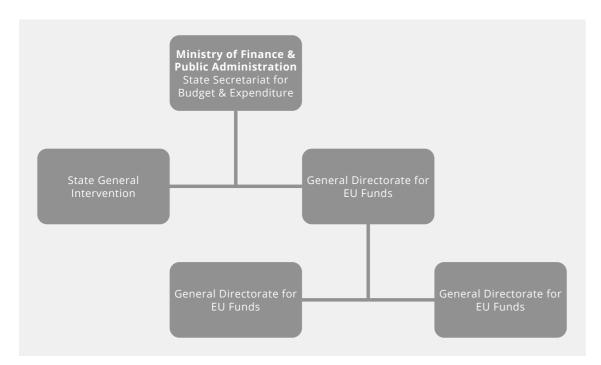
# 7.4 POLICY INSTRUMENTS AND RURAL ESTATES

### TARGET POLICY INSTRUMENT

The target policy instrument is the Operational Program RDEF Extremadura 2014-2020.

The Management Authority of the Operational Program RDEF Extremadura 2014-2020 is the General Sub-Directorate of ERDF Management of the regional government, which is the regional equivalent of the General Directorate of Community Funds of the National Ministry of Finance and Public Administration and depends on the latter.

The internal organization of Public Authorities involved (National and Regional) are shown in the following organization charts.

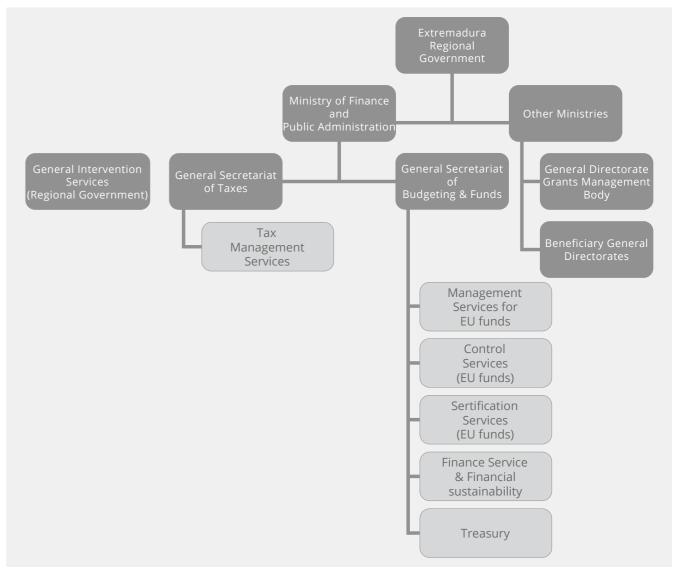


Extremadura ERDF Operational Program (2014-2020)-Objective OE 6.3.1" To boost the protection, promotion and development of the Cultural heritage". Priority for investments number 6: "The preservation, promotion and development and natural heritage".

The main objective of this policy is the valorisation of cultural and natural heritage resources of the Region. One of the main actions to be funded under this priority is the creation of natural and cultural itineraries in order to promote sustainable tourism and the economic development of rural and urban areas. The creation of virtual resources is also included.

The project will help in the identification and design of tools and actions for the correct implementation of programs under the addressed policy. The policy will be improved during the Interreg project due to the identification and adaptation of Best practices from other EU regions. Other partners can also study the actions implemented in Extremadura for cultural heritage and sustainable tourism.

The operational program objective 6.3.1 for the promotion of heritage is not limited to protected heritage sites or even listed sites. However, protected sites (BICs) have a recognized interest and this can play a role in the distribution of the funds.



Organization chart for the management of ERDF funds within the National Government

### HERITAGE POLICY

The legislative power distribution affecting the Historical Heritage assets in Extremadura is defined as follows.

### National Level (Central government)

The central government takes the responsibility for preserving and maintaining the Historical Heritage of Spain through the Law16/1985 (Jun 25th). From a Fiscal point of view, the National Government is in charge to regulate the State Taxes (VAT, Corporate Income Tax,) and those ones assigned to the Autonomous Communities (IRPF-personal income tax; wealth taxes; inheritance duty and gift tax; tax on the transfer of assets). These laws defined the BIC's (Asset of Cultural Interest) in order to get the maximum category for protection. The law is transferred to the Regions in the 80s and from that point Regional Governments are competent to declare what elements are included in the list of BIC's.

### Regional Level (Autonomous Community Extremadura)

The regional government manages the Historical Heritage through the Law 2/1999 (March 29th) and its modification Law 3/2011 (February 17th). From a fiscal point of view, this law complements the national tax law, on an annual basis.

In Extremadura, the Law 2/1999 for Cultural and historic Heritage of Extremadura, following the Law 16/1985 maintain the category of BIC's to goods that can be movable, immovable or intangible.

The BIC's are classified for the purposes of their declaration as a monument, Historical set, Historic Garden, Historic site, Archaeological area, Paleontological Zone, Places of Ethnological Interest, Archaeological Parks, Archaeological Protection Spaces. The declaration is made by decree of the Gov. of Extremadura, at the proposal of the Regional Minister for Culture, after the completion of a special procedure regulated in the National Heritage Law. The list is dynamic meaning that new elements can be incorporated every year. The declaration of a BIC implies maximum protection for the declared asset. Any intervention in the asset requires the prior authorization of the Regional Ministry for Culture and implies the recognition of unique historical and cultural values that must be safeguarded and preserved for future generations.

Extremadura also establishes a second category: Inventoried good of historical and cultural heritage of Extremadura. This includes those assets that, without enjoying the relevance or the values of a BIC, have a special singularity worthy of being preserved as integral elements of the Regional Historical and Cultural Heritage, and will be included in the Inventory of Historical and Cultural Heritage for research, consultation and dissemination purposes.

Another category is the "remaining assets of the Historical and Cultural Heritage of Extremadura" which are the immovable, movable and intangible assets that, despite not having been subject to declaration or inventory, possess the values described in article 1 of the Law 2/1999 (goods that for having an artistic, historical, architectural, archaeological, paleontological, ethnological, scientific, technical, documentary and bibliographic interest, deserve a special protection and defence. Also archaeological sites, natural sites, gardens and parks that have artistic, historical or anthropological value, urban areas and elements of the industrial architecture as well as rural or popular elements and the ways of life of the people and its language that are of interest for Extremadura).

LAW 6/2018, of July 12, of modification of Law 2/2011, of 31 of January, development and modernization of tourism in Extremadura. The management of tourism and the promotion of Extremadura as a tourist destination, taking into account its environmental, cultural, economic and social reality. Likewise, promote sustainable tourism development based on territorial, social and economic, and limited according to the load capacity that is, if necessary, determined for visits to sites or protected areas.

#### Municipalities

According to the hold legal and fiscal attributions by mean of their municipal tax regulations, Municipalities can establish fiscal benefits in agreement with Regional and Nacional Laws and specifically with the Royal Decree 2/2004 (March 5th).

### Programa 1,5% Cultural

In addition to the above mentioned laws,
Public Administration provide financial support
to historical heritage proprietors by means of a
Public tender "Programa 1,5% Cultural" from the
Nacional Ministry of Development ("Ministerio
de Fomento"), consisting on financial support to
carry out maintenance activities with Heritage
assets. Municipalities or private institutions
could apply only if addressed to previous assets
catalogued as "Properties of Cultural Interest". It
seems to be a good opportunity to improve the
dominant precarious castle maintenance.

### SWOT-ANALYSIS

STRENGTH	WEAKNESS	OPPORTUNITY	THREAT
Quality and quantity of the historical rural estates.	Scarce or no future foreseeable public funding for restoration.	Innocastle project.	Significant number of castles highly degraded and in risk of collapse.
Previous efforts to restore most of the publically owned historical estates has already been carried out	A number of restored rural estates are closed.	The awareness-raising from the general public.	The foreseen budget for heritage projects is very limited due to a foreseen cut of SF in the region.
Access to SF for the next programming period	Low experience with public-private partnerships.	Existing associations favouring Castle protection.	Depopulation in rural areas.
An important part of the historical rural estates is under public property.	Most of the castle proprietors have difficulty to afford restoration and maintenance works.	Increase in general interest for visiting cultural and heritage sites.	
A will to collaborate among different administrations	A lack of general awareness of the problem.	Increase in the interest in inland tourism.	
Most rural estates are located in attractive natural and rural touristic areas.	A lack of communication structures or tools to allow collaboration between different administrative bodies and with private agents.	Strong efforts to avoid rural depopulation.	
	Poor marketing and valorisation of heritage resources.		

# 7.5 LEARNING CASES AND CHALLENGES

LEARNING CASE: ZAFRA - PALACIO DE LOS DUQUES DE FERIA

**Location**: Zafra town (Zafra Municipality/County)

**Historical period**: Medieval castle having important renaissance elements.

**Key architectural elements:** 8 circular tours, including the outstanding homage tour, wall paintings, stairs. Inside it emphasizes a courtyard, the well and chapel having an outstanding

coffer ceiling

Ownership: Public

Visits allowed: Yes

**Present use:** hotel and restaurant; social events; professional meetings and conferences Reasons for good practices: Exploitation model. It is a public asset managed as a private institution with a good consideration among citizens in general.

**Objectives of learning case:** to improve the link between the site and the local surrounding community: Municipality/County ("Mancomunidad"), neighbourhood, community, etc. The Parador (public company managing the castle) focuses mainly on tourists and high level parts of society but not always the connection with the local community is fluent.











### LEARNING CASE: "CASTILLO DE MEDELLIN"

**Location**: Medellin town (Medellin Municipality) **Historical period**: Medieval. Military Castle

**Key architectural elements:** Double wall, ramparts, rectangular tours, semi-circular tours.

The exterior barbican is almost lost.

Ownership: Public
Visits allowed: Yes

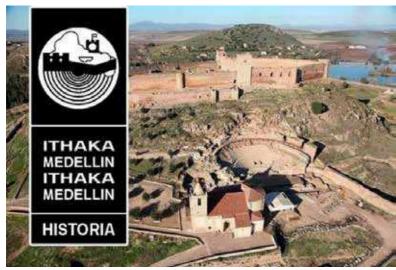
**Present use:** open and guided visits

**Reasons for the good practice:** Efficient castle restoration thanks to the efforts and commitments (over 5 years) of Public Administrations (Regional Government, Province Government and Municipality). Use of EU Social funds involving unemployed people during the restoration. Support from local cultural associations and civil society in general. The celebration of a prestigious classic theatre festival taking place in an adjacent roman theatre.

**Objectives of learning case:** It is necessary elaborate and implement protocols or procedures to warranty an efficient long-term management of this asset.











# <u>LEARNING CASE: "CASTILLO Y MURALLAS</u> <u>DE ALBURQUERQUE"</u>

Asset name: "Castillo y murallas de Alburquerque"

**Location**: Alburquerque Town (Alburquerque Municipality/County)

**Historical period**: Medieval Christian

**Key architectural elements:** Gates, tours, battlements, maintaining the whole city wall.

Ownership: Public Visits allowed: Yes

Present use: open and guided visits under appointment, historical play (annual festival)

**Reasons for the good practice:** Good restoration and maintenance

Involvement of neighbourhood and local community

Consolidation of the annual festival

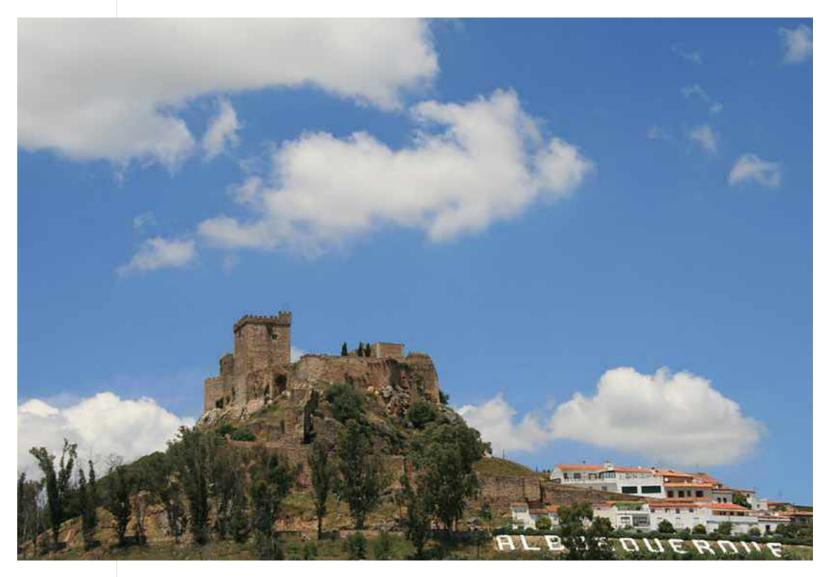
**Objectives of learning case:** The castle includes a good quality hotel accommodation (finished some years ago) not yet inaugurated due to administrative and political reasons.

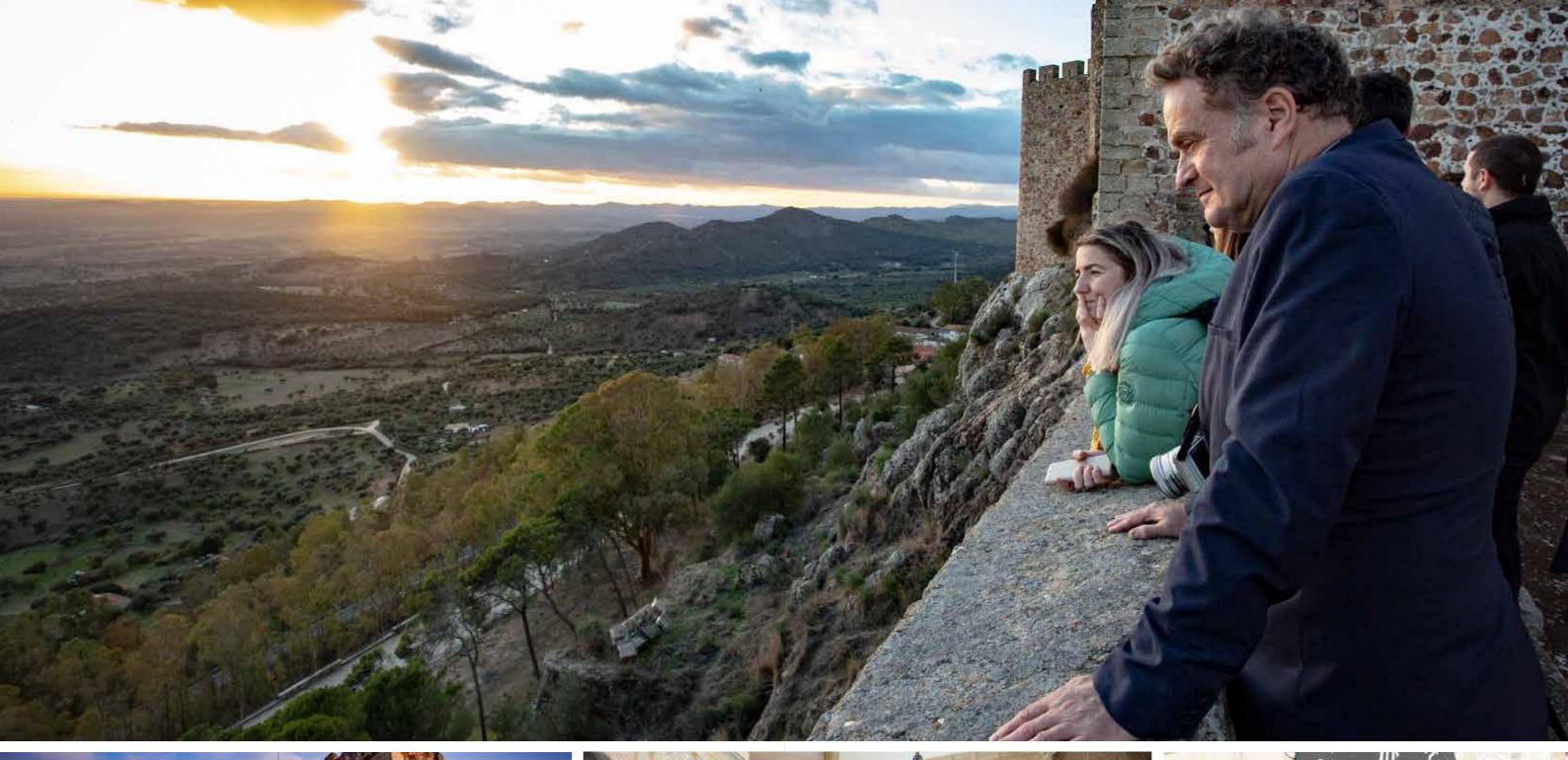
some years ago) not yet inaugurated due to administrative and political reasons.

The Castle needs an efficient exploitation Plan. The Castle, despite its good condition and characteristics is not being exploited, apart from irregularly organised visits, due to

administrative and political reasons.

Solutions should be found through the development of a public/private partnership











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### **IDENTIFIED CHALLENGES:**

### **Target policy instrument:**

The policy instrument defines an amount of funds that are supposed to be invested in heritage for the present period, but the definition of programs and strategies for the use of these funds is very general.

In fact, the DG for heritage promotion has a very limited budget for heritage projects funding and there is not a clear strategy for the design and implementation of programs in this direction.

The policy is not being correctly implemented, and during Innocastle the aim is to define protocols to improve the design and management of actions towards heritage exploitation and maintenance. These actions will be focused on improving communication among different administrations, protocols to define more specific strategies for the use of ERDF fund for heritage and the promotion of specific taxes exemptions for castle owners to implement sustainable exploitation projects.

The lack of a clear strategy from the DG for heritage promotion regarding the promotion and sustainable exploitation of rural estates, due in part for the limited resources available during the last years for heritage at Regional and National level, together with a limited communication and cooperation with the DG for tourism, are two issues that have affected the implementation of the target policy instrument.

### Rural estates in general:

Apart from the elements included as "BIC's" (Asset of Cultural Interest), "Inventoried good of historical and cultural heritage of Extremadura" and "Remaining assets of the Historical and Cultural Heritage of Extremadura", that list some of the main heritage assets in the Region (including some castles, palaces among other elements), the database of castles in the region with a defined ownership (which represent a part of the actual castles in the territory), and the inventory of the Spanish Association of Friends of Castles in the region, there are not specific inventories for all the elements that could be included in the Innocastle definition of rural estates.

If we analyze the situation of rural estates, the following challenges can be considered:

- Lack of more completed inventories for rural estates.
- Not specific programs for Taxation and subsidies focused on rural estates.
- Lack of programs for heritage exploitation projects.
- Scarce or no future foreseeable public funding for restoration.
- Lack of a exploitation strategy for a good part of the restored rural estates.
- Scarce public-private partnership experience.
- Difficulties from most of castle proprietors to afford restoration and maintenance.
- A lack of general awareness of the problem.
- A lack of communication structures or tools to allow collaboration between different administrative bodies and with the private agents.
- Poor marketing and valorisation of heritage resources.

## 7.6 TOWARDS AN ACTION PLAN

Taking into account the SWOT analysis and identified challenges, the following actions have been suggested within the 3 selected strategic axis:

# Seeking for public-private business models to apply to rural estate management.

- To identify and analyse cases of good practices on public/private partnership in order to identify, develop and implement the right management model on key assets, i.e., Alburquerque and Medellin castles.
- To elaborate and implement management protocols or procedures into the key assets to warranty an efficient long-term and sustainable management

# Looking for a better promotion, marketing and product development.

- To identify and analyze cases of good practices on marketing and valorization of heritage resources in order to identify, develop and implement the right management model with key assets.
- To elaborate efficient communication tools to foster the awareness raising from general public
- To strength the relationship with key public and private stakeholders:
  - Public Administration to built-up a global support
  - Castle associations from existing synergies
  - Tourism sectorial agents in order to include "Heritage Castle Routes" into the Regional tourism strategy
- To explore the opportunity for funding coming from the development of efficient models of Corporate Social Responsibility.
- To improve the communication among different key administrations in heritage promotion and exploitation

# Identifying legal and fiscal barriers/tools to efficient rural estate running.

We are describing here an ideal scenario, but clarifying that some of the proposed actions within the strategic axis 3 are beyond the action policies of the Regional Authorities:

- In order facilitate the application of different protection levels existing at present, it is crucial to obtain a unification criterion, among the different Public Administrations involved (National, Regional and Local), about the legal definitions of "heritage patrimony, cultural and artistic".
- Once decided the corresponding protection level for each individual asset, it is necessary to determine the fiscal benefit, i.e. fiscal exemptions or subsidies, aiming to improve the asset situation (maintenance, restoration), preferably under the same ownership.
- To establish a fiscal compensation system, among the different Public Administrations, taking into account the tax revenues and the costs incurred concerning the Heritage assets.

In a long term, the above mentioned objectives will be a starting point for promoting the following final aims:

- To develop a unique National Protection
   Law (Spain)with a clear definition about the
   obligations of each Public Administration
   concerning the "heritage patrimony, cultural
   and artistic" in Spain.
- To develop a European Directive on Heritage Protection, mandatory for all States members, defining clearly the general objectives to be complemented for each country according to its legislation.



# <sup>8.1</sup> INTRODUCTION TO THE REGION

The province of Gelderland lies in the center of the Netherlands next to the border with Germany. In terms of area (5,137 km2) it is the largest of the twelve provinces of the Netherlands. Gelderland's 51 municipalities are home to 2 million inhabitants.

The region has a varied landscape with forests, large rivers and rural areas. You will also find modern urban hubs such as Arnhem, Nijmegen and Wageningen with international secondary schools and universities supporting the knowledge-based economy.

The province of Gelderland occupies a strategic location. Bordering Germany and the European hinterland, the province acts as an important portal for the Randstad (the conurbation encompassing the cities of Amsterdam, The Hague, Rotterdam and Utrecht, Schiphol Airport and the Port of Rotterdam).

The existence of the main rivers of the Netherlands, Rijn (Rhine), Waal, IJssel and Maas (Meuse) has been of great importance to the history of Gelderland. Many castles were built in the river area.

The County of Guelders arose around castles near Roermond (now the province of Limburg) and Geldern (now Germany). The county was expanded with the regions of the Betuwe (including Arnhem) and Veluwe, the county of Zutphen and later the city of Nijmegen. The central position and the control over the rivers gave it a powerful position in the north-western region of Europe. The county was raised to a duchy by the Holy Roman Empire in 1339. The duchy revolted with the rest of the Netherlands against Spain and joined the Union of Utrecht. Gelderland became a province of the Kingdom of the Netherlands in 1815.

Gelderland is an important province for tourism in the Netherlands, with old cities like Nijmegen, Arnhem, Apeldoorn, Zutphen, Doesburg, Elburg and Tiel. Main attractions are the National Park Hoge Veluwe, Royal palace Het Loo, the Netherlands Open air Museum (history of the Netherlands), Burgers Zoo, Museum Kröller-Müller (modern art) and Museum Het Valkhof-Kam (archeology). Gelderland welcomes about 4 million visitors annually of which 0.6 million from other countries.

Just like the other Dutch provinces, the province of Gelderland has its own administration. The provincial government has its seat at Arnhem, which is also the capital of the province. From there the province carries out its core duties and in doing so occupies an intermediate position between national government and local municipalities.

The province coordinates, monitors and makes decisions on matters such as traffic and transport, urban and country planning and the environment. This mid-level position makes the province especially suited to making assessments from a broader perspective, which are nonetheless geared towards its own municipalities and region.

## 8.2 RURAL ESTATES IN THE REGION

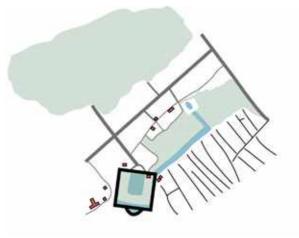
### **INTRODUCTION**

Due to its important role in the middle ages and the fact that the rivers in those days were main traffic arteries, Gelderland had many small and large castles. Even now Gelderland has more castles than any other province in the country. Dating mainly from the period 1000-1600, they were owned by the nobility and part of the power structure of the duke of Gelre.

Most manors date from the period 1600-1940. In many cases former castles that lost their use as means of defense were transformed into beautiful house for the nobility, the rich and the powerful. They are situated near the larger cities (for instance as a summer residence), are easily accessible, and are provided with fresh water and beautiful landscaped parks.

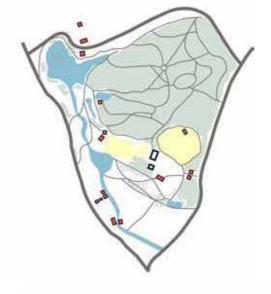
The Estates, castles and manors with large areas for agriculture or forestry, often originated from the possessions of the nobility, have always been at risk of being split up in smaller areas and therefore losing their original structure.

Many of the manors (and some castles and estates) were bought or built by the new rich in the 19th and early 20th century. Often these are people that "made it" in the new industry or in the colonies that were looking for a peaceful (summer-) residence away from the crowded cities in the west of the Netherlands, and very often settling down in or around Arnhem.



Middle ages to 16th century

Middachten



17th and 18th century Sonsbeek



19th century Laag-Wolfheze

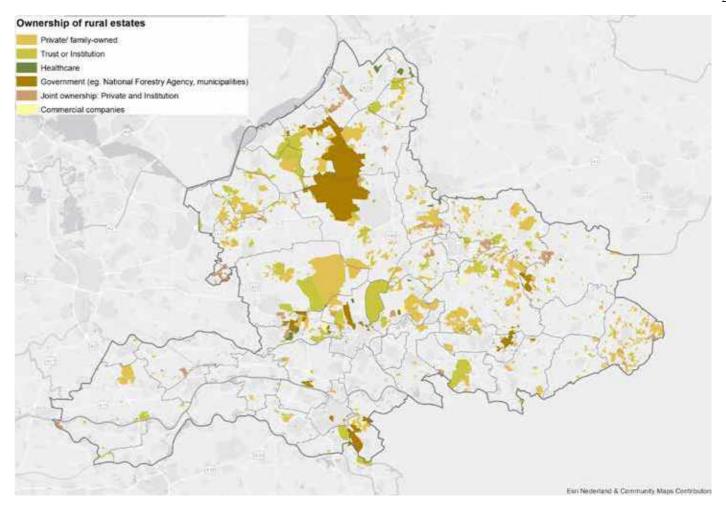


1900-1940 Villa Sanoer

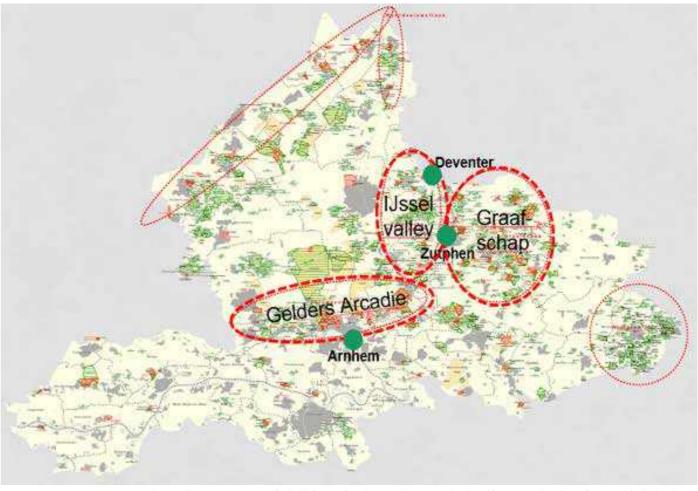
We broadly define various types of estate buildings: transformed medieval castles and estates, 17th and 18th century regent country houses and estates, and young country houses with parks in 1800-1900 and 1900-1940. Each type has its own characteristics of location, landed property, function, aesthetics and ownership

### **IDENTIFICATION**

In the 'national register of monuments', which covers heritage which is protected on a national level, rural estates can be easily isolated using the term 'castle & country house' (kasteel en buitenplaats). These items are either the protection of a single building or the protection of a complex existing out of buildings and a park. 119 rural estates can be identified which are protected as a complex and 97 are protected as a single building. The national register thus identifies 216 rural estates within the province. Local protected rural estates cannot be identified with this national register and local databases have to be consulted separately. In the region marked as 'Gelders Arcadië' 32% (7 of 22 estate complexes) of the protected heritage complexes are protected on a municipal level for example. There is no list of unprotected rural estates and as such it is difficult to estimate the total number of estates within the province. In the context of a research project, Gelders Genootschap developed a map indicating all the area's which have estate qualities within Gelderland. It reveals 550 separate areas ranging from protected rural estates to estates which have disappeared but still leave their mark in the landscape. Although this map does not have any legislative value and the qualities differ from case to case, it indicates the important influence of this heritage on the province for example. As such it helps policy processes towards a more integrated and regional approach.



Areas with rural estate qualities in Gelderland, categorised by present-day ownership, including rural estates that are owned by families (private), trusts/ institutions, governments and commercial parties

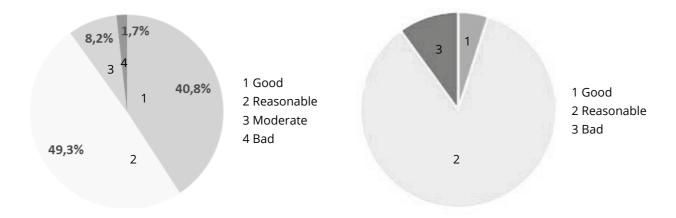


Indication of main concentrations of valuable historical rural estates. They are not distributed homogenously and specific zones with a higher density such as Gelders Arcadië, IJssel valley or Graafschap can be identified.

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### **USE AND CONDITION**

Due to the high cost of maintenance, property tax and high cost of energy the percentage of privately owned has decreased over the years. But even now two thirds are privately owned. Others are used by businesses as an office or are turned into hotels or restaurants. Special tax schemes and subsidies granted by national, provincial or local government helps owners to maintain, insulate or renovate their possession.



Rural estates in Gelderland are generally in a good condition. The condition of the green heritage however could be improved.

According to our "heritage-monitor"
(Gelderse Erfgoedmonitor) 90% of the buildings on castles, manors and estates are in good of reasonable shape and don't need much substantial renovation, 10% needs to be looked after of which a small part needs urgent renovation. However, the condition of gardens, parks and water features is worse. 10% is bad, 85% is reasonable and only 5% is good.

A very important player in Gelderland is Geldersch Landschap & Kasteelen (GLK, Gelderland Trust) that owns 35 castles, manors and estates. GLK receives a yearly subsidy form the province to keep 7 (museum) castles open for visitors. Many other castles and manors, owned by private organisations or local foundations, are also open to the public. Not to mention state property like palace Het Loo or the castle of Loevestein.

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## 8.3 STAKEHOLDERS

The instrument of the Heritage Policy Program is influenced by and has influence on a wide array of stakeholders.

#### **Owners**

Owners of rural estates, both private and other, are essential stakeholders who take initiatives to restore and revive their property. The province facilitates through intermediate organisations such as 'Monumentenwacht' (monument watch) and 'Gelders Restauratie Centrum' the knowledge and skills that are needed to achieve good quality. The province is co-funding many initiatives.

### Municipalities

In the Dutch system of heritage care the municipalities are essential granting permits to owners, in many cases in coordination with the province and the national government.

Gelders Genootschap, an association of the municipalities, plays a vital role in informing and advising the municipalities.

### **Platform**

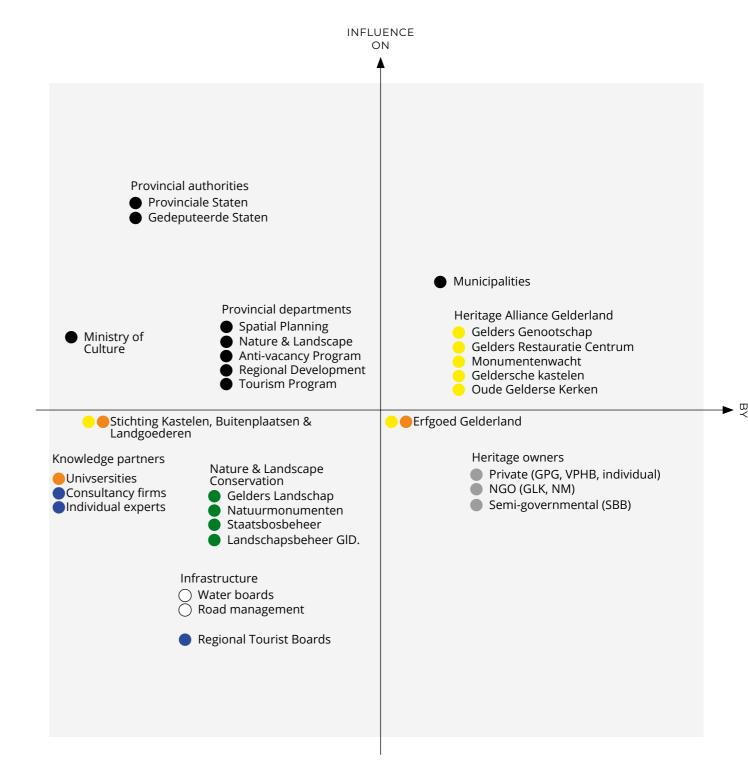
The Stichting Kastelen, Buitenplaatsen & Landgoederen offers a platform on which owners, specialists and authorities meet and where new challenges that are relevant for the policy instrument are identified.

### **Knowledge partners**

Knowledge partners that contribute to the development of the policy instrument are universities and specialized consultancy firms, especially the Technical University of Delft that organizes living labs to explore new ways of heritage programming.

### **Provincial departments**

The policy program is also influenced by and has influence on other departments of the province. Cooperation with departments of Nature & Landscape, Water, Spatial Planning and Tourism is promoted to connect heritage to important challenges. The stakeholders of these departments are in a sense also the stakeholders of Heritage. This is particularly true of Nature & Landscape organisations and water boards.





- Heritage
- Academia & Education
- Culture & Sport
- Landscape & Nature
- Agriculture
- Real Estate
- Infrastructure
- Other

## 8.4 POLICY INSTRUMENTS AND RURAL ESTATES

### **INTRODUCTION**

The Culture & Heritage policy program is a self-binding instrument from the Province of Gelderland that is renewed every four years. The current program runs for the period 2017 through to 2020. Responsibility for drawing up the document lays with the Provincial Executive for Gelderland. The program is then adopted by the parliament of Gelderland, the Provincial Council of Gelderland. The parliament also provides the required funding.

The policy program is drawn up following consultation with representatives of heritage owners, other government authorities, heritage institutions and experts. It contains the outlines of policy and programming. Implementation including financing may be adjusted annually.

The policy program operates within political and legal frameworks. In political terms the executive program, the administrative agreement between the parties who share executive responsibility, is of key importance. In legal terms, it is subject among others to the Heritage Act and the Spatial Planning / Environment Act.

### THREE HERITAGE OBJECTIVES

The program consists of three primary objectives for heritage.

Firstly, reinforcing 'functional heritage' which refers to the necessary link between work on physical heritage and viability functions; in addition investments involving the province are always assessed from this point of view. Any work is undertaken in accordance with provincial quality standards.

The second objective is to strengthen cooperation within the heritage sector, whereby cooperation with and between institutions working across the entire province of Gelderland is relevant (Heritage Alliance), as well as cooperation with and between municipalities (for example via heritage pacts).

The third objective is to promote innovation and to translate new developments within the program. This for example includes development of the Heritage monitor, the Characteristic and Sustainable Heritage (KaDEr) program and the response to new national policy.

In addition to these three main objectives, the province has a statutory task in planning and advice where heritage (sites) are under threat. This responsibility demands a sound knowledge base and advisory capacity.



The international partners of Innocastle during the study visit in Gelderland. Here at Middachten castle, where they discussed the value of heritage volunteers

### FOCUS ON RURAL ESTATES

Because the collection of castles, country homes and country estates in Gelderland represents a large proportion of the entire heritage collection, in implementing the policy program, there is considerable focus on these sites. Related activities include drawing up annual agreements with Geldersch Landschap & Kasteelen. There is also regular consultation with other owners and experts. Every year a fluctuating number of rural estates sites are subsidised with funds linked to the policy program, to enable restoration, often in combination with measures aimed at improving sustainability and/or accessibility. Consultation is regularly organised with owners and municipal authorities on the permissibility of developments that could threaten rural estates sites.

With regard to rural estates, links are created from the policy program with other provincial programs so that policy and financing do not hinder but instead strengthen one another.

This includes links to programs for nature and landscape, urban development and tourism.

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### SWOT-ANALYSIS

STRENGTH	WEAKNESS	OPPORTUNITY	THREAT
The Policy Program enhanced the building and maintaining of a tightknit network	People use the network, developed by the Policy Program, because it helps in the application for subsidies. How strong will the network be if it is less moneydriven?	Parties that work on a provincial level are willing to coordinate their activities more closely.	Municipalities are important players in the field of heritage but their possibilities to act on heritage are decreasing. This is a thread to a well-functioning network.
Strong in Tangible measures for individual cases.	Working on selected collections or regions	Increasing demand of the different stakeholders to connect heritage to the general challenges of today and area-based approaches	The recognizability of heritage as a specific sector is decreasing.
Well-developed system that enhances Quality in restauration	Certain incentives to enhance the restauration quality could be better.	Working more closely together with builders that work in heritage, and on vocational training	Decrease in the number of craftsmen working in heritage
Some Innovations: e.g. sustainability	Sustainability is not always well integrated in working on heritage	A large demand of heritage owners to work on sustainability	Sometimes scepticism exists towards to compatibility of certain sustainability measures with the heritage quality of the sites.
Communication: Doing a lot of good work, being modest about it	Tell the world what happens on heritage in Gelderland	The developing of a new policy program in 2020	

## 8.5 LEARNING CASES AND CHALLENGES

# INTRODUCTION AND METHODOLOGY

In the last few years we saw an increasing demand for the provincial fund for restauration. The provincial fund, intended for (the restauration of) the broad collection of built heritage, so not just rural estates, grew from €1 million in 2001 to €26 million in 2019. The provincial parliament has recently asked for an evaluation of the fund and if necessary a proposal for an adjustment of the current rules.

In the fourth quarter of 2019 a discussion paper has been presented to the parliament. The paper includes a reconsideration of the present provincial role and approach. It will be discussed with the parliament and with stakeholders and must lead to a new better strategy towards built heritage in Gelderland.

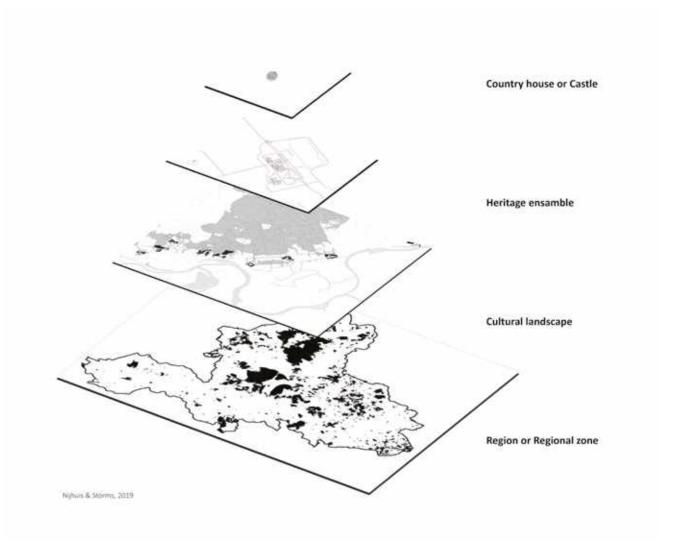
Part of the discussion will be about having a focus with funding projects. We realize that we are not able to help every heritage owner and will have to make choices. Especially since the budget for 2020 will be far less than the €26 million that was available in 2019.

At the first stakeholder meeting in March 2019 we invited a representation of estate owners and governments. The main objective was to explore, discuss and improve the role of government agencies in the processes of maintaining, developing and improving historic country houses, castles and landed estates in the province of Gelderland. Together with approximately 25 participants we explored three present-day challenges in relation to country and landed estates: A. climate adaptation; B. heritage tourism; C. spatial fragmentation. We mapped and listed good practices and present-

day challenges (long list), from which we chose three potential learning cases per theme. Since March we have spoken to direct stakeholders and together we have made our selection of learning cases. Three Gelderse estate zones have been chosen to participate in Innocastle. The choice was announced during the Innocastle Symposium. These learning cases will be further elaborated in the near future. The Province of Gelderland hopes to learn more about the role of governments in relation to other parties in maintaining and developing castles, country estates and estates.

For this project we use a spatial approach, analyzing challenges, opportunities and stakeholders on various spatial levels:

- 1. A region or regional zone to which the country/ landed estate belongs to;
- The country or landed estate as a part of a wider cultural landscape (including neighbouring country and landed estates, villages, etc.);
- 3. The country or landed estate as a heritage ensemble (including a country house or castle, side buildings, parklands, woodlands, farms, etc);
- 4. The country house or castle as the main building, the core of the country or landed estate.



### All three cases have their own focus:

- In the Gelders Arcadia estate zone, the municipalities of Arnhem, Renkum, Rheden, Rozendaal
  and Wageningen and owners such as Middachten and the Gelderland Trust will work on finding
  a good balance between strengthening heritage tourism in the estate landscape and preserving
  heritage values.
- In the municipality of Voorst, the municipality and owners around Twello will learn about strengthening the spatial cohesion of the estate zone in the middle of the Apeldoorn-Zutphen-Deventer urban triangle.
- In the Baakse Beek area, the province together with the Rijn & IJssel Water Board, the
  municipality of Bronckhorst and the estate owners look at the significance of the heritage on
  estates for water issues. In particular climate adaptation: how to deal with long periods of
  drought and occasional heavy rain in the estate environment.

# LEARNING CASE: POWER LANDSCAPES OF GELDERS ARCADIA

**Region**: The estate zone of Gelders Arcadia **Theme**: Heritage tourism and spatial quality

**Stakeholder**: The municipalities of Arnhem, Renkum, Rheden, Rozendaal and Wageningen, the

country house and estate owners and tourist boards.





The park of Rosendael castle has been famous since the seventeenth century. It is one of the more than 100 country houses and rural estates of Gelders Arcadia.

The region, now known as Gelders Arcadia, encompasses the municipalities of Arnhem, Renkum, Rheden, Rozendaal and Wageningen. Characterised by the relief of ice-pushed ridges (Veluwezoom) the area was popular among the Dutch elite from the Middle Ages onwards. Medieval castles and landed estates, 18thcentury regent country estates and modern 19th- and 20th-century country houses can be found. In total, over one hundred country and landed estates have been identified. Particular valuable features in this estate zone are the landscapes created by the stadtholders and their noble friends, such as the so-called King's roads. Stadtholder king William III constructed long roads on the Veluwe, his hunting grounds, to connect various hunting lodges and castles.

In 2007 heritage agency Gelders Genootschap initiated a participation project called 'New Gelders Arcadia', working together with the province of Gelderland, the five mentioned municipalities and the local private and institutional landowners. In 2011 the five municipalities set up a joint visionary document on the estate zone (made by Gelders Genootschap & Poelmans Reesink Landschapsarchitecten). In recent years several educational and art projects have taken place in Gelders Arcadia. As yet, no large scale restoration or redevelopment has been implemented on a regional scale, although much has happened on individual estates.

### **Problem analyses**

- The power landscapes, such as the King's roads, are owned by multiple owners and are situated in various municipalities. A joint vision and management is difficult to realize.
- Not many (heritage) tourists are aware of the history of these power landscapes. The features are not always well recognizable.

### Objectives of learning case

Heritage tourism on a regional scale: looking particularly at so-called power landscapes, the landscapes created by the most important estate owners in the 17th, 18th and 19th centuries. Historic landscape elements and structures such as King's Roads, estate boundaries (poles etc), and the castles and country houses as 'power houses' (Girouard). How can we bring this story to the public and make the regional landscape better experienced? In the Gelders Arcadia estate zone, the municipalities of Arnhem, Renkum, Rheden, Rozendaal and Wageningen and owners such as Middachten and the Gelderland Trust will work on finding a good balance between strengthening heritage tourism in the estate landscape and preserving heritage values.

### Our objectives are:

- Setting up a joint touristic approach to the power landscapes of Gelders Arcadia, enabling local country house owners to participate.
- Setting up a joint management plan for the King's Road from Dieren towards Hoekelum to distinguish possible challenges, opportunities, solutions and collaborations.
- Ensuring continuity in regional collaboration in Gelders Arcadia by setting up a foundation or trust.

### **Spatial approach**

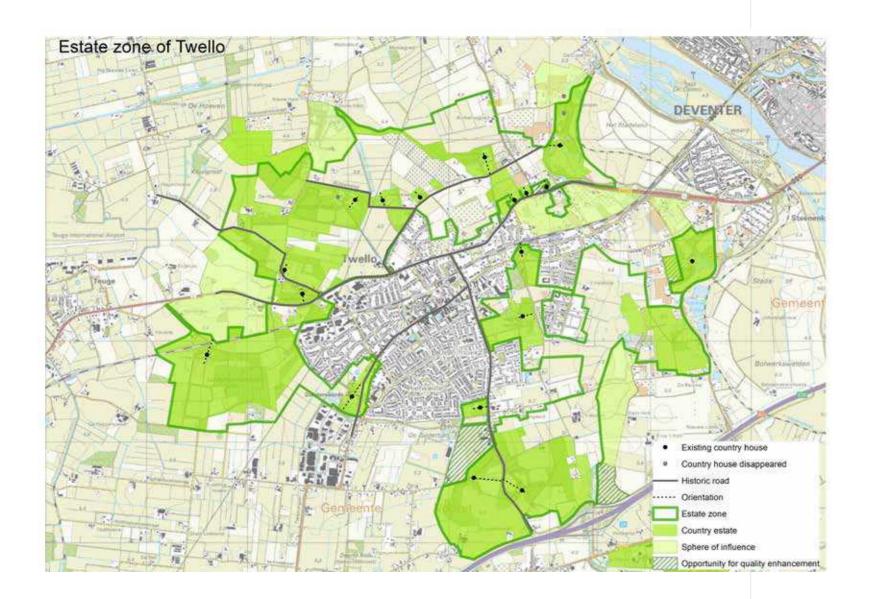
For this project we use a spatial approach, analysing challenges/ opportunities/ stakeholders on various spatial levels:

- 1. A region: Gelders Arcadia focus level of this learning case
- 2. The cultural landscape: depends on participating estate owners
- 3. The country or landed estate as a heritage ensemble: depends on participating estate owners, such as Natuurmonumenten, Geldersch Landschap & Kasteelen, Middachten and Hof te Dieren.
- 4. The country house or castle as the main
- building, the core of the country or landed estate.

### LEARNING CASE: ESTATE ZONE OF TWELLO

**Region**: Twello, municipality of Voorst **Theme**: Spatial fragmentation

**Stakeholder**: The municipality of Voorst, the country house and estate owners



Voorst is described as "the green heart of the "City triangle" (Stedendriehoek) enclosed by the cities of Apeldoorn, Deventer and Zutphen. The area offers a wide variety of landscapes in the high sand transition area from the Veluwe to the IJssel Valley. The beauty of this rural area was recognized early on. In the eighteenth and nineteenth century wealthy families from the surrounding cities bought plots of land to build country houses and country estates. Voorst therefore has a wide-ranging estate zone (also called the Green Carré), full of monumental buildings in a park-like landscape. This rich cultural history is a crucial part of the identity of Voorst that it wants to retain and - where possible - strengthen.

In all new developments, the spatial quality and the cultural values are leading. That is why the municipality of Voorst has drawn up policy principles for the consolidation of her country estates.

### **Problem analyses**

Spatial fragmentation has occurred through infrastructural and urban expansions. What is necessary to recreate coherence and cooperation?

### **Objectives of learning case**

Around the town of Twello, within the municipality of Voorst, a zone of estates is clustered. People want to build new houses in and around Twello. The goal is to keep the estate landscape as a whole as there is a risk that fragmentation increases and quality disappears. New legislation is needed to reinforce the character of the area, to be able to recognize it as a quality zone. But also: how to integrate housing expansion in a zone with an estate quality?

Therefore, it is vital to create awareness amongst the community and involvement of the public. Creating a meaning for the individual owners and the municipality. Creating awareness of the history and future of the area (the potential opportunities). It is crucial to bring the different parties together. This can be used as a base to develop the area, considering that the community loves the area. However, it is important to not only talk about quality, but other interests as well. Economics, for example, can convince some people who are not interested in the heritage argument. In addition, collaboration on the maintenance is cheaper.

### Our objectives are:

- Collaboration between various owners and governments
- Help the municipality with creating new local policies/ legislation
- Joint estate management plan

### Spatial approach

For this project we use a spatial approach, analysing challenges/ opportunities/ stakeholders on various spatial levels:

- 1. A region: Valley of the IJssel river
- 2. The cultural landscape: The estates around the village of Twello focus level of this learning case
- 3. The country or landed estate as a heritage ensemble: depends on participating estate owners, such as Groot Noordijk en Klein Noordijk.
- 4. The country house or castle as the main building, the core of the country or landed estate.



International participants of the Innocastle symposium in June 2019 discuss the challenges of spatial fragmentation in the estate zone of Twello.

Together they explored new spatial solutions and the value of participation.

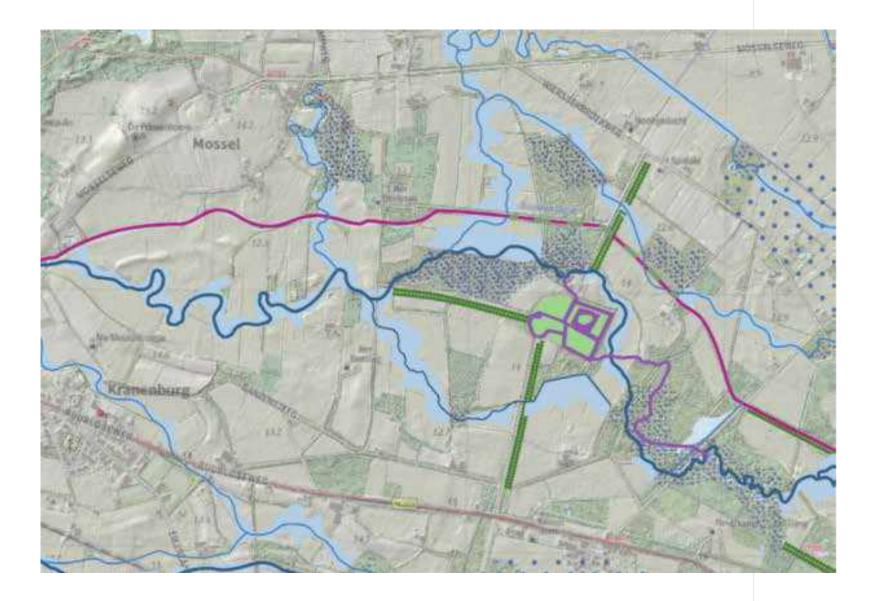
### LEARNING CASE: ESTATE ZONE BAAKSE BEEK

Case name: Estate zone Baakse Beek

**Region**: Rural estate-zone Baakse Beek, municipality of Bronckhorst

**Thema**: Climate adaptation

**Stakeholder:** Water authority Rijn en IJssel, estate owners



The Baakse Beek zone consists of landed estates and agricultural land, interconnected by the system of the small river Baakse Beek. The majority of the estates dates back to Medieval times. Some are owned by trust organisations, however most of them are privately owned. Most of the estates are A-listed as ensembles of buildings, gardens, parks and water features. Tourism has developed on the quality of the castle-and- estate-landscape.

Regional collaboration is important and in the region a platform is installed, in which private and other owners work together with the local government, the municipality of Bronckhorst. The regional water authority 'Waterschap Rijn en IJssel' has moreover started a process of involving owners of the estates in an area based approach to find solutions for present day challenges on water management, nature and agriculture.

### **Problem analyses**

In recent years, climate changes have led to long periods of drought and short intervals of intense rainfall. We will need to adapt to this (climate adaptation) by making our (built) environment climate proof. Can country and landed estates in Gelderland play a role in this challenging task? How can we ensure that new developments needed for 'climate adaptation' are embedded in these historically valuable and aesthetic (park)landscapes?

The responsibilities of the provincial authority are manifold: on water management, nature conservation and development, landscape planning and protecting heritage.

### **Objectives of learning case**

Particularly an estate zone such as this has many opportunities to combine and connect various themes: nature, heritage, water management, exchange of landed property. Quality is a primary condition in present-day challenges at estates. Make a direct connection with design. There is also an opportunity for tourism and recreation.

Focus: water retention, restoration of historic water management structures in the park landscapes.

### Our objectives are:

- making heritage part of the process of changing the water system towards climate adaptivity
- finding out what role the province can play best
- introducing landscape design as a contribution to move from analysis to solutions

### Spatial approach

For this project we use a spatial approach, analyzing challenges/ opportunities/ stakeholders on various spatial levels:

- 1. the region Graafschap
- 2. Estate zone Baakse Beek
- 3. Small groups of estates that are closely linked by the water system
- 4. Individual estates



The estate zone Baakse Beek in the east of Gelderland suffers from draught. The waterboard Rijn en IJssel is looking for solutions, involving the estate owners and supported by the province. Understanding the way that the historic estates are situated in the natural landscape is an important step towards solutions. In the picture the eco-hydrologist Louis Lansink of the waterboard explains the approach to students and researchers.

# 8.6 TOWARDS AN ACTION PLAN

The province of Gelderland is rethinking its role, approach and instruments. The year 2020 will be the year when we study and test new instruments, implement a new approach, find (new) partners and reinvent our role. Lessons learned from the learning cases will help us to do so.

Pilots with new to develop instruments will contribute to both processes. In particular the spatial approach will, we expect, contribute. Connecting the field of rural estates to other policy fields like climate adaptation (Baakse Beek), tourism (Gelders Arcadië) and spatial fragmentation (Twello) will too.

While the learning cases get going we will, at the same time, work with parliament and stakeholders to set our goals for the coming years. The conclusions and results from the learning cases will contribute to the process of policy making. While the discussions in the political arena pilots might give input, and new questions, for the learning cases.

We trust working on the learning cases in the Innocastle program will help us understand the benefits and challenges of a spatial approach. The findings of the learning cases will support the province of Gelderland in renewing the Culture & Heritage policy program. The aim is to learn on the basis of current challenges, together with owners and municipalities.

### COLOFON

This publication is developed during the Innocastle project phase 1 (2018-2020) Funded by Interreg Europe.

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Chapter 1-4

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Gelders Genootschap: Storms-Smeets Elyze

### THANK YOU

Many stakeholders in the different regions have supported us through their contributions, feedback and input. The success of Innocastle is the success of the cooperation and trust between all stakeholders involved. We especially like to thank the following stakeholders.

### **ROMANIA**

Ministry of Public Works Development and Administration - ROP Management Authority, Regional Development Agencies Center and South-West Oltenia, Ministry of Culture - UMP, DPC and DJC; Ministry of Agriculture and Rural Development - AFIR, Ministry of the Environment, Ministry of Tourism, Mureş County Council and all the city halls in Mureş County that provided information regarding HCME, Institution of the Prefect - Mureş County, Romanian Waters - Mureş Water Basin Administration, Mureş Forestry Department, members of the civil society - OAR, UAR, UNRMI, ARCHÉ Association, PONT, unDAverde, Teleki Castle Association, Positive Transylvania.

#### WEST FLANDERS

Flanders Heritage Agency, Regional office
North West Flanders, Flemish Land Agency
(VLM), Nature and forest agency (ANB), Visit
Flanders, Westtoer, Heritage Office West
Flanders, Spatial Planning West Flanders,
Herita, Landelijk Vlaanderen, Green Services
Department province of West Flanders
(groendienst - Provinciedomeinen en groene
assen), Monumentenwacht, Bosgroep Houtland,
Regionaal Landschap Houtland, Raakvlak and of
course the different municipalities as well as the
many owners and managers of the rural estates
in the landscape park Bulskampveld.

### **BADAJOZ**

The Regional Government of Extremadura: Managing authority for ERDF funds involved in the elaboration of the case studies and the implementation of the study visit and seminar in Spain. The DG for Heritage Promotion has participated actively in the development of the LAP.

The Spanish Association of Friends of the Castles: Sharing of information for the Baseline survey and Participation in the thematic seminar. The Fundación Xavier de Salas: Collaboration in the implementation of the thematic seminar in Spain and the description of good practices. The PARADORES: support in the implementation of the thematic seminar in Spain.

Castillo de Piedrabuena: Collaboration for the study visit in Spain.

### **GELDERLAND**

The municipalities of Gelders Arcadia estate zone (Arnhem, Renkum, Rheden, Rozendaal and Wageningen), municipality of Bronckhorst, municipality of Voorst, the Water Board Rijn & IJssel, H2O Cooperation of estate owners, Technical University Delft, SKBL, Dutch Castle Foundation, National Heritage Agency (Rijksdienst voor het Cultureel Erfgoed), National Forestry Agency (Staatsbosbeheer), Natuurmonumenten, Geldersch Landschap & Kasteelen, private country house owners such as Middachten castle, De Wiersse estate, Groot Noordijk estate and Gelders Particulier Grondbezit, Bronckhorster Kroonjuwelen Beraad, Tourist Board Veluwe Arnhem Nijmegen, Tourist Board Achterhoek, Monuments Watch Gelderland and the Heritage Alliance Gelderland.

### **IMAGE CREDITS**

Cover - Photograph of the Marghiloman manor - Hagiesti, Romania -Arhiva Asociației ARCHÉ

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