



Action Plan for the region of Alto Tâmega (Portugal)

KEEP ON
Interreg Europe



European Union
European Regional
Development Fund

ADRAT

ASSOCIAÇÃO DE DESENVOLVIMENTO
DA REGIÃO DO ALTO TÂMEGA



I - Introduction

The project KEEP ON - Effective policies for durable and self-sustainable projects in the cultural heritage sector, is a project approved and granted by INTERREG EUROPE Programme, financed by the European Regional Development Fund (ERDF).

This partnership gathered public and private entities from Southern Europe (Spain, Portugal, Italy, Greece), Eastern Europe (Poland and Croatia) and Central Europe (The Netherlands).

The overall objective of the project KEEP ON is to improve public policies in the cultural heritage sector in terms of delivering high quality projects, resulting sustainable with reasonable public funding and have long-lasting impact on regional development.

There were chosen different Policies Instruments to be improved, what should happen with the approval and execution of the correspondent Action Plan proposed.

During this process, there were different exchange of experiences and knowledge (stakeholders meetings, study visits, informal talks, workshops), that conducted to the identification and selection of many good practices, proposed by each partner, discussed and approved within the partnership, and latter validated by the Joint Technical Secretariat. Besides their availability in the project webpage, section of Good Practices (www.interregeurope.eu/keepon), most of them were also included in the database of Good Practices of Interreg Europe Programme.

This document is, thus, the Action Plan proposed by the partner from Portugal, ADRAT, aiming to improve the Policy Instrument addressed and it was elaborated based not only on the perspective of the partner and of the Managing Authority, but also very relevant, based on the recommendations arise from the stakeholders group.

II - Relevant Lessons Learned

The simple fact of integrate a transnational partnership allows already the opportunity to contact and learn from other partners and national realities. If we add also, the participation of external experts and organizations (as stakeholders), and the possibility to contact and analyse *in situ* (study visits) other initiatives within the thematic, we gather many elements and information that can be resumed as lessons learned along the project.

This way, we can list the following, as the most relevant:

- Correctly identify the cultural heritage of the territory, the organization responsible, its conservation status and functionality.



- It is fundamental to have defined the scope of intervention of each local or regional public entities.
- Involve all interested parts aiming a wider use and cultural “ownership” of the projects.
- Share responsibilities for the options, through the participation of local communities.
- Adapt properly the financial instruments for cultural heritage projects.
- It is essential that workers and collaborators have a proper cultural and technical training.
- The involvement of research and education institutions give more credibility of the projects' options.

These lessons are the base of the actions proposed, for which naturally contributed the identification and examples of the Good Practices (GP) selected, that are also identified in each of the actions (PART III), in order to easily link the inspiration and knowledge gained with each GP.

III - Key Issues and Challenges

Attending to the Policy Instrument implementation and to the European context, there are some general recommendations that can be clearly presented, tackling the sustainability and durability of cultural heritage projects:

- Careful financial planning, if possible, combining different funding sources.
- Use an integrated approach for the management, ensuring different levels and entities: decision-makers, local communities, experts.
- Keep continuous education actions, addressing both the heritage technicians and local education communities.
- Apply new technologies for the interpretation, promotion, and conservation of the heritage.
- Reorient the use of built heritage for the community, ensuring its long-term sustainability.

Given the described above and the specific actions proposed in the following parts of this Action Plan, there are some changes and improvements expected in the next Policy Instrument version:

- Definition of clear and specific indicators related to future cultural projects.
- Definition of a set of priorities for projects addressed by public funding and grants.
- Complete knowledge of the cultural heritage existing and responsible organizations.



Part I – General information

Project: KEEP ON - Effective policies for durable and self-sustainable projects in the cultural heritage sector

Partner organisation(s) concerned: ADRAT – Associação de Desenvolvimento da Região do Alto Tâmega/ Development Association of Alto Tâmega's Region

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NUTS2 region: North

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Part II – Policy context

The Action Plan aims to impact:

- Investment for Growth and Jobs programme
- European Territorial Cooperation programme
- Other regional development policy instrument

Name of the policy instrument(s) addressed: **Estratégia Integrada de Desenvolvimento Territorial do Alto Tâmega / Territorial Development Integrated Strategy of Alto Tâmega**

Further details on the policy context and the way the action plan should contribute to improve the policy instruments:

This Policy Instrument is a regional strategy, NUT III – Alto Tâmega, managed by the Intermunicipal Community of Alto Tâmega. It is valid for the period 2014-2020, being necessary its revision for the next European programming period. This Policy Instrument is still ongoing, and its revision (promoted by the correspondent Managing Authority), it will happen in this transition period of the European Framework pos-2020, most likely during 2021-2022.

The Territorial Development Integrated Strategy of Alto Tâmega, is a strategic document that all region has to take in account in the implementation of several initiatives and projects, that reflect the common efforts of Alto Tâmega relevant agents aimed to the region development, based in the European, Nacional and Regional guidelines, supported by the European Strategy 2020 and in the Strategic Common Framework 2014-2020.

This Policy Instrument needs to be improved and revised, according to the new realities and needs of the community, and will enclose the next European Framework for the period after 2020. So, it will be mainly in this period that the results of the Action Plan will be included in the PI.

It is expected that the Action Plan can produce results and valid information for the definition of new and clear intervention options regarding cultural heritage, namely attending to the definition of priorities and specific indicators for this sector.

Part III – Details of the actions envisaged

ACTION 1:

Name of the action: **Mapping of Cultural Heritage**

1. **Relevance to the project** (*please describe how this action derives from the project and in particular from the interregional exchange of experience. Where does the inspiration for this action come from?*)

The phase 1 of the project KEEP ON was based in a learning process and knowledge exchange and sharing of diverse types of information, between ADRAT (as project partner) and the stakeholders group, as well as between ADRAT and the rest of project partners and their stakeholders groups'.



About this action we should highlight that appeared by the comments related to the stakeholders group meeting, that all the presents think that it's very important that the Alto Tâmega region knows what and how is the cultural heritage and its distribution.

This learning can be highlighted in the following references:

- It is important to clearly identify which cultural heritage (material and immaterial) exists in the intervention territory, as well as the persons (collective or individual) owning it, as well as its conservation status and functionality (e.g. such as the Good Practice identified in the project regarding the “Monastery of Mariënborg”, in The Netherlands);
- It is fundamental that, based in the previous, is clearly defined the scope of competence/action of each of the local/regional public entity, in a way to rapidly design new projects and ensure its sustainability (e.g. Good Practice of “Parador of Santo Estevo”, in Spain).

It should be reinforced that both recommendations above, were undoubtedly proposed by national stakeholders' group, within the different meetings held along phase 1 of the project, what consolidates the importance of their involvement in this type of project.

2. **Nature of the action** (*please describe precisely the content of action 1. What are the specific activities to be implemented?*)

Mapping of Cultural Heritage (material and immaterial) existing in Alto Tâmega region. This action shall include:

- the inventory of the heritage, according to the various possible types (built heritage, archaeological, ethnographic, etc.), conservation status, potential threats, purpose (museology component, training, etc.).
- georeferentiation of the heritage identified, and
- identification of individual persons/organizations/entities owners and/or with management power of this cultural heritage.

It can be added that this action represents an improvement of the PI implementation, since this will be undertaken through a specific new project, under the present PI guidelines.

It is expected to undertake this action through a project specifically elaborated for this purpose and to be financed by a National Operational Programme. With this, it will be collected the maximum information possible about the existent cultural heritage and its use/conservation status.

The information gathered (mapping), should latter be included both in the description/characterization of the territory covered by the Policy Instrument as in the fundamentals of intervention axis, objectives, or strategic lines to be implemented in the future.

Following this mapping, the Managing Authority shall introduce the information in their own GIS, although this shall probably occur in a later stage, after the implementation if the Action Plan. Throughout this mapping we intend to acknowledge the existing cultural heritage in the region of Alto Tâmega, in order to give relevant information to the MA that allows them to know better about the existing cultural heritage, its state od



conservation, to whom is related/managed. With this mapping work it is possible to improve the design and conduct measures and new projects for the cultural heritage, within the Policy Instrument implementation.

3. Stakeholders involved *(please indicate the organisations in the region who are involved in the implementation of the action1 and explain their role)*

ADRAT – will be responsible for the mapping, cataloguing and presentation to the regional competent entities, specifically, to the Intermunicipal Community of Alto Tâmega (CIMAT).

Municipalities of Alto Tâmega – as local public authorities have already specific competences and responsibilities in the cultural heritage of their territories, with exact information about their features. These entities will support ADRAT in the gathering of information about it. Also, they belong to the Regional Council of CIMAT, what will facilitate the articulation between all entities in this process.

CIMAT – as public authority of level NUTIII and Managing Authority (MA) of the Policy Instrument addressed by the project, it will attend, namely, providing some information that already have and proceeding to its update through the Geographic Information System (GIS) of the Observatory of Alto Tâmega (<https://sig-altotamega.pt/>), where it should be placed the main data of this mapping, according to its type.

Northern Culture Regional Directorate – as Governmental entity (NUTII – North Region), it has the formal competences and deep knowledges of the thematic, quite relevant to support CIMAT in the organization and availability of the information.

4. Timeframe *(please specify the timing envisaged for action 1)*

June/2021 - May/2022

5. Costs *(please estimate the costs related to the implementation of action 1)*

60.000,00€ (estimation).

These costs correspond to the Mapping of Cultural Heritage, and the costs expected should be mainly related with external expertise services.

6. Funding sources *(please describe how action 1 will be financed. Is it through the policy instrument(s) indicated in part II):*

To execute this action, it will be required funding from different support programmes, namely the Operational Programme NORTE2020 and the Rural Development Programme 2020. This it will be an independent new project, but although we can identify the provisional funding source, we cannot detail about when it will occur, since the call is yet not open and does not depend on the partners' initiative.



ACTION 2

Name of the action: **Consultation to private and public entities**

1. **Relevance to the project** (*please describe how this action derives from the project and in particular from the interregional exchange of experience. Where does the inspiration for this action come from?*)

From the interaction with the stakeholders' group, resulted the recommendation of the urgency to implement a stronger articulation between the different organizations that work with cultural heritage (municipalities, cooperatives, enterprises associations, individual entrepreneurs, etc.), for a better definition of priorities and for a more coordinated use of public financial instruments.

Besides that, within the exchange of experiences with the project partnership and their stakeholders, are highlighted 2 particularly important aspects, also observed in some Good Practices identified within the project
KEEP ON:

- Involve all interested agents (public and private), in a way that the final purpose of the projects be the wider possible and duly appropriated/owned (in the sense of cultural identification) by citizens and, thus, facilitate its future sustainability (social, economic and environmental) (e.g., Good Practices of "Old Town of Dubrovnik", in Croatia and "Local History Conference of Paggaiio", in Greece).
- It is relevant that the local community can, in some moment (even if, in an informal way), participate in the process of definition, execution, management and valorization of cultural heritage projects, thus, being the society co-responsible for the investment options done (e.g., Good Practice "I LUOGHI DEL CUORE", in Italy).

2. **Nature of the action** (*please describe precisely the content of action 1. What are the specific activities to be implemented*)

Consultation to private and public entities intervening in cultural heritage in Alto Tâmega region. This consultation will be done through a closed online questionnaire, focusing on different topics related with cultural heritage. The answers collected of the cultural agents, will be contributing for the definition of specific objectives and results indicators about cultural heritage, within the Territorial Development Integrated Strategy of Alto Tâmega's Region (EIDT 2014-2020), of CIMAT. These objectives and indicators should comprise, among others, which type of interventions should be supported, what type and how many assets of cultural heritage should be included in conservation or promotion projects, what kind of partnerships should be enhanced, etc.

ADRAT, in network with the MA, will develop a guideline for a questionnaire to be applied to all the organizations that are related to cultural heritage, and then it will proceed with the contacts to all interested parts, delivering them the questionnaire. The gathering and analysis of the answers will also be conducted by ADRAT, that will be after presented to the MA.



The answers will be analysed in a way to obtain a synthetic document with all the major perceptions and opinions presented, in order to facilitate a “joint” interpretation about the existing knowledge in what cultural heritage concerns. These answers could introduce features’ details, useful for a clear definition of investment priorities and execution indicators, to be included in the Policy Instrument. The information here obtained will be considered, naturally, to improve the Policy Instrument until the end of it, but it is intended to contribute for the design for the next version of the PI and its future implementation, for example with the information collected, the MA will know better the needs of the most relevant cultural heritage assets.

3. Stakeholders involved *(please indicate the organisations in the region who are involved in the implementation of the action1 and explain their role)*

ADRAT – it will be responsible for the elaboration and distribution of the questionnaire, as well as for the analysis of the answers received and organizations of main conclusions.

Municipalities of Alto Tâmega – they will give support in obtaining answers from local parochies, as well as will support CIMAT in the inclusion of the results in the EIDT of Alto Tâmega.

CIMAT – it will gather the information already treated and presented by ADRAT, in a way to be included in future support measures and local/regional interventions concerning cultural heritage, namely in the definition of investments priorities and execution indicators.

4. Timeframe *(please specify the timing envisaged for action 2)*

June/2021-December/2021

5. Costs *(please estimate the costs related to the implementation of action 2)*

12.000,00€

These costs correspond to the consultation to private and public entities intervening in cultural heritage in Alto Tâmega’s region and the analysis of the answers sent by them. This action it will be ensure by external services.

6. Funding sources *(please describe how action 2 will be financed. Is it through the policy instrument(s) indicated in part II):*

This action will be implemented by means of own sources of each entity.



ACTION 3

Name of the action: **Human Resources Capacitation**

7. **Relevance to the project** *(please describe how this action derives from the project and in particular from the interregional exchange of experience. Where does the inspiration for this action come from?)*

The various activities of the project KEEP ON, as well as the different documents produced (individual and common documents), emphasised the importance of the consolidation of technical and cultural knowledge, not only of the human resources of public entities, but also from the several private organization linked to cultural heritage.

We can underline the following learnings, that fundament the present action proposal:

- the financial support processes to cultural heritage projects, should be the more adapted possible to the profile of the beneficiaries/proponents of the projects, as well as to the type of cultural heritage in question and its use (e.g. Good Practices identified of "Royal Castle of Checiny", in Poland and the "Visitants Centre of St. John Bulwark", in The Netherlands).
- it is essential that workers and collaborators of local and regional institutions, responsible for cultural heritage, have a proper technical and cultural training, in order to be totally capable to answer effectively to the project needs' (both during its implementation and after its financing) (e.g. Good Practices of "Old Town of Dubrovnik" and "Ecomuseum of Batana", in Croatia).
- the involvement of education and research institutions cannot be ignored, given the technical and scientific knowledge existing, also because of the need to have greater credibility and justification of the options concerning the interventions on cultural heritage and its future uses (e.g. Good Practices of "Philippi Festival" and "Local History Conference", in Greece).

8. **Nature of the action** *(please describe precisely the content of action 1. What are the specific activities to be implemented)*

Human Resources Capacitation, regarding the heritage values of Alto Tâmega region. This capacitation shall involve staff and collaborators, both from public and private sector since there are several contexts in which both lead and are responsible for cultural heritage interventions. With their professional human resources better prepared, the implementation of the Policy Instrument (EIDT of Alto Tâmega), will be more efficient and have a better response to the organizations` needs and to the cultural heritage projects to be developed.

Having human resources/staff well prepared and knowing the "state-of-art" of the cultural heritage of the region, could contribute to have a more assertive and capable professional performance, also to support the identification and definition of indicators, as well as to identify intervention needs and opportunities and their respective financing methods or chances for the Policy Instrument. Within these human resources we can also refer those who deal daily with tourists and visitors, that for sure will be more capacitated to show and present the cultural heritage of the region.



The actions should be undertaken along the period of validity of the Policy Instrument, after 2020, most probably using different modalities: room sessions, online sessions, study visits, etc.

Right now, given the uncertainty due to the COVID-19 pandemic, as well as the social and economic demands, also to the public entities, it is quite difficult to inform in more detail, how this capacitation will be done and financed.

With better prepared human resources in terms of cultural heritage knowledge and comprehension, the Managing Authority and its main regional partners (namely the Municipalities), there should be an improvement in the daily management and implementation of the Policy Instrument. This should be particularly relevant in the own internal services of the MA, attending to the cultural heritage future Projects (own Projects or of other organizations), developed within the PI.

We can consider that there will be a functional and quality improvement of the PI, influencing its own management.

9. Stakeholders involved *(please indicate the organisations in the region who are involved in the implementation of the action1 and explain their role)*

Municipalities of Alto Tâmega – much of local cultural heritage, namely physical and built heritage, are already under management of the Municipalities, that have staff working on this heritage. Thus, within their internal processes, there will be a reinforcement of their professional training and improvement.

CIMAT – in the quality of regional authority of level NUTIII, with competences in cultural heritage subjects, will coordinate these actions, with the support of other public and private organizations, such as ADRAT, the Municipalities of Alto Tâmega, ACISAT, Northern Culture Regional Directorate and High Education Institutions.

10. Timeframe *(please specify the timing envisaged for action 2)*

January/2022 - February/2023

11. Costs *(please estimate the costs related to the implementation of action 2)*

25.000,00€.

The expected costs will be related with logistical aspects, practical field activities and external services.

12. Funding sources *(please describe how action 2 will be financed. Is it through the policy instrument(s) indicated in part II):*

This action will be done using own funds the entities, as well as with the support of different programmes to which, is expected, some activities, will apply for grants.

Naturally, in order to ensure grants from National or European programmes for this, it will be necessary to formally present proposals with this purpose. Right now, we cannot specify to which programme or call this action will be proposed.



Date: 27/07/2021

Name of the organisation(s):

Associação de Desenvolvimento da Região do Alto Tâmega

Development Association of Alto Tâmega's Region



Signatures of the relevant organisation(s):