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Changes in Cultural Heritage Activities: New Goals and Benefits for Economy and Society

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CHANGES is a European Project supported by the JPI Heritage Plus program.

Considering the diversity of European cultural heritage, the skills required in built heritage activities and the spread of environmentally sustainable approaches, the research aims at

**producing new local models directed to support
Planned Preventive Conservation, Maintenance and Monitoring.**

The **main topics** are:

- conservation and valorisation as preventive measures;
- effectiveness of maintenance, involving relevant craftsmanship and expertise;
- economic mechanisms underlying built heritage conservation in the context of regional economy and the wider construction sector;
- impact of knowledge gain and its dissemination on smart economy for built heritage conservation, heritage management and construction sector.

The **expected outcomes**, to be transferred to stakeholders and society, in order to increase social and human capital at a local level are:

- a better understanding of cultural heritage;
- an empowerment of local communities;
- a progress of protection quality of built heritage;
- environmental enhancement;
- an improved cost-effectiveness for private owners and managers of historic properties;
- a proposal for a funding scheme supporting a sustainable conservation process.

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Partners:

- **Politecnico di Milano**, ABC Department
- **Katholieke Universiteit Leuven**, MAT Division
- **Uppsala University**
- **Delft University of Technology**, Heritage & Architecture Section
- **Foppoli Moretta e Associati**



POLITECNICO
MILANO 1863
DIPARTIMENTO DI ARCHITETTURA,
INGEGNERIA DELLE COSTRUZIONI
E AMBIENTE COSTRUITO



Associate Partners:

- Monumentenwacht Noord-Brabant
- Monumentenwacht Flanders
- Consorzio Villa Reale e Parco di Monza
- Navarra Gestioni
- Assimpredil ANCE, Association of Building and Related Companies of Milano, Lodi, Monza e Brianza provinces



Work Packages:

1. Project Management.
2. Conceptualization of previous experiences: **MonumentenWacht** in Belgium and in the Netherlands, **Halland Model** in Sweden, **Distretti Culturali** in Italy.
3. Implementation of maintenance systems: investigation on efficacy of maintenance practices in Belgium.
4. Implementation of maintenance systems: investigation on efficacy of maintenance practices in The Netherlands.
5. Implementation of maintenance systems: investigation on efficacy of maintenance practices in Italy.
6. Economic analysis of costs and benefits of preventive conservation practices (monitoring and maintenance systems).
7. Analysis of economic and societal impacts and externalities of valorisation strategies including conservation activities.
8. Dissemination and transfer.

CONCLUSIONS

Responsible

Principal Investigator 1: Prof. Stefano Della Torre, Politecnico di Milano, Department of Architecture, Built Environment and Construction Engineering.

Partners involved

- **Principal Investigator 1:** Prof. Stefano Della Torre, Politecnico di Milano, Department of Architecture, Built Environment and Construction Engineering.
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- **Principal Investigator 3:** Prof. Silvia Naldini, Technische Universiteit Delft, Heritage & Design.
- **Principal Investigator 4:** Prof. Christer Gustafsson, Uppsala University.
- **Principal Investigator 5:** Engineer Dario Foppoli, Foppoli Moretta e Associati consulting engineers.

Timing

June 2017 – December 2017

CHANGES project explored actual results and stakeholders' attitude toward conservation pursued through different models in different countries, concluding that:

1. Regular inspection and maintenance can empower people and involve communities; these topics should be addressed by the policies (going beyond the horizon of physical conservation).

The research carried out in The Netherlands, Flanders and Lombardy had the opportunity to investigate the outputs and the outcomes of preventive conservation practices set up long time ago in some cases, and at the first levels of implementation in other cases. Owners' attitudes have been analyzed and discussed, detecting several criticalities, but acknowledging that the attitude towards preventive conservation entails a step forward triggering openness towards higher conservation quality and wider targets. The conclusion is that people empowerment and social inclusion could be more than bare externalities of the actions aimed at physical conservation. Different weaknesses in different countries were detected through the comparative analysis of the strategies, signifying the need of never overlook a general and long-term vision of the processes: in some cases interventions are controlled, but there is a lack of regular inspections and maintenance, in other cases inspections are regular but the interventions are not controlled and there are complains on the scarcity of qualified craftsmen, in other cases there are concerns about the lack of diagnostics and scientific support. Anyway, the problems come from the limits of the implemented approach, and their solution implies some changes in the local/national regulations in order to include all the phases of the process in the vision, and to get more stakeholders engaged. Including engagement, capacity building and dissemination, projects will get more sustainable.

2. Planned and preventive strategies should address the interaction with the environment and the uses of the premises.

An integrated understanding of sustainability entails a comprehensive approach of heritage. The analysed case studies, especially framed in the Halland and in the Distretti Culturali models, show that an integrated approach is mandatory to enhance decision making and to help the management of the properties.

3. Planned and preventive strategies should take into account costs/benefits estimation analyses and risk management, encouraging wise budgeting for conservation on the long run.

Many stakeholders revealed that continuous care of historic properties is often impaired by the lack of budgeted resources. The problem seems to arise both in front of exceptional events (earthquakes, floods, fires...) and in front of more ordinary needs. This means that there is a lack of risk management in front of big hazards, and a lack of predictive cost analysis: or at least the foreseen maintenance costs are seldom set into private and public budgets. The climate change effects have already been pointed out as factors, which make these issues more and more dramatic. CHANGES research put on the forefront some already tested and implemented tools to carry out cost estimations, which should be integrated in facility management practices in order to budget planned and preventive conservation activities and an effective preparedness to risk. The availability of grants, loans or other financial incentives, especially targeted on prevention and small repairs proved to be effective in encouraging owners to procure activities of continuous care.

4. Restoration of strategically chosen monuments can foster integrated projects, whose benefits are much more sustainable if they include capacity building and enhance the governance and management systems.

The shift towards a more sustainable and resilient management of historic properties requires a change in attitudes. The management of such change should be among the aims of any investment in heritage field. Therefore, interventions should be as much as possible embodied into comprehensive plans, including change management and capacity building along with physical conservation. These actions should tackle the weaknesses detected in the different environments: in some cases, the main concerns are about the lack of qualified craftsmanship and the increasing scarcity of traditional skills, in other cases most complains are about the lack of attitudes to management and governance. A thorough investigation of the context is therefore always required, in order to customize the most effective actions. The analyzed case studies prove that well designed actions can foster openness to innovation, enhance the managerial skills, create alliances which make heritage processes more sustainable as exploiting the value created “upstream” by the cooperation between different sectors and supply chains. General weaknesses and threats cannot be treated without a strong cooperation with the actors of the territory.

5. The engagement of stakeholders, including owners, citizens and decision makers, is often critical, so that this issue has to be carefully addressed from the first stage of any project.

The enhancement of the competences of the actors, who take an active role in the conservation and management process proved to be difficult because of a lack of engagement. Single actions are often unable to engage actors towards an active and durable attitude. Comprehensive projects, as they can from the very beginning include tailored measures for the engagement of players and citizens, proved to be more effective and sustainable, even if several failures gave the opportunity to learn lessons on the many criticalities that can stop or spoil the innovation processes. The adoption of new business models and public-private partnership (PPP) could be effective, under the conditions that targets are correctly clarified from the beginning and people involvement (the fourth P) is not overlooked.

Lessons learned can be synthesized in few major bullets:

- **Upstream perspective:** the most important benefits are got as new dialogues are set up already in the negotiation phase, enhancing territorial capital.
- Priority on **the program phase**, as the one that can set up long-term strategies, alliances, quality levels, technologies and skills to recover or to enhance.
- To guarantee higher quality in the interventions can enhance **durability**, as well as the criterion of **preventive efficacy** can improve cost/efficacy of maintenance activities.
- **Enhancing the tools** can reduce the costs (e.g. digitalization and interoperability could cut the costs of knowledge management) making preventive conservation strategies more feasible in owners' perspective.
- **Community involvement, awareness and citizenship:** in the spirit of the Faro Convention, conservation of cultural heritage has to get these aims, so conservation has to be integrated with other activities, never dividing conservation and valorisation.
- **Sharing values** is crucial to owners' and decision makers' attitudes.

CHANGES results end up in providing Policy Makers and Influencers with simple rules for more effective funding policies:

- Implement preventive conservation and preparedness to risk: therefore encouraging actions **supporting long-term conservation activities** (regular inspections, maintenance, monitoring, implementation of technologies and competences); important interventions should always include their follow-up, and consider prevention, monitoring and careful diagnostics as criteria for rewarding.
- Implement **integrated actions**, supporting planned actions, which link conservation/valorisation with the development of technical and managerial skills, as well as craftsmanship.
- Use the **matching-grants** leverage, in order to foster owner's engagement and capacity to integrate single interventions into comprehensive projects.
- Implement integrated planning in an **"upstream" perspective**, which could help promoters to multiply the targets, diversify the financial sources and enhance the sustainability of the projects on the long run.
- Put people involvement and social inclusion as mandatory targets included in any heritage project, also when implementing private business models and public-private partnership.
- Put the hiring of better skills as a mandatory target included in any heritage project.
- Avoid funding restoration works, if not framed into a sound and long-sighted **management plan**, including attention paid to sustainable uses, carefully designed budgets and preparedness to risk.
- Implement tools for **cost analyses and prevision of financial flows**.
- Make all different Preservation activities as **consistent, interoperable and integrated** as possible.

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