



changes

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.

changes

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

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.

WP2

CONCEPTUALIZATION OF PREVIOUS EXPERIENCES

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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Methodology adopted

Desk.

Timing

July 2015 – April 2016

Abstract

Three main experiences were synthesized and shared, that are:

- The last update of **Monumentenwacht** movement in The Netherlands and the Flanders: it is a well-established, experienced and highly professional organization that embodies Planned Preventive Conservation in the real world. It supports private and public built heritage owners and managers in the preservation of their properties through a system of regular systematic maintenance. The Netherlands and Flanders play a pioneering role as a country and region where Monumentenwacht is successfully realized, respectively since 1973 and in Flanders since 1991.
- A wide-area projects in Italy, called **Distretti Culturali**: it is a wide laboratory for an action-research performed on a real task. The Distretti Culturali call issued by Fondazione Cariplo is a huge matching-grant program aimed at producing new attitudes toward culture as a factor for local development. Each project includes several actions, some related to tangible heritage, some on intangibles, some targeted to governance and communication. Actions related to built cultural heritage had a major part of the budgets, up to 75%. Masses of data are available for conceptualization of learned lessons.
- The **Halland Model** in Sweden: it is an application-oriented theoretical platform for inclusiveness, sustainability, innovation, regional growth, competitiveness and building conservation development.

Such a diversity represented the strength of the research, as the contributions by the partners covered most of the problems of the preservation system, dealing with all the phases of the process and avoiding the risk of stopping at solutions which work only in the frame of specific contexts. Therefore, a specific effort was addressed at making the previous experiences comparable by discussing and analysing each case study with the same grid, that was built through exchange and discussion, having in mind the targets of the analyses foreseen in the following work packages.

Link to other WPs

WP2 set up the methodology and the tools for the action research carried out in different environments through WPs 3, 4 and 5, identifying the data to be gathered and the methods for interpretation and elaboration in WP6 and WP7.

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INTRODUCTION

The work package 2 of the Changes project analyses and compares three different models developed by the different partners:

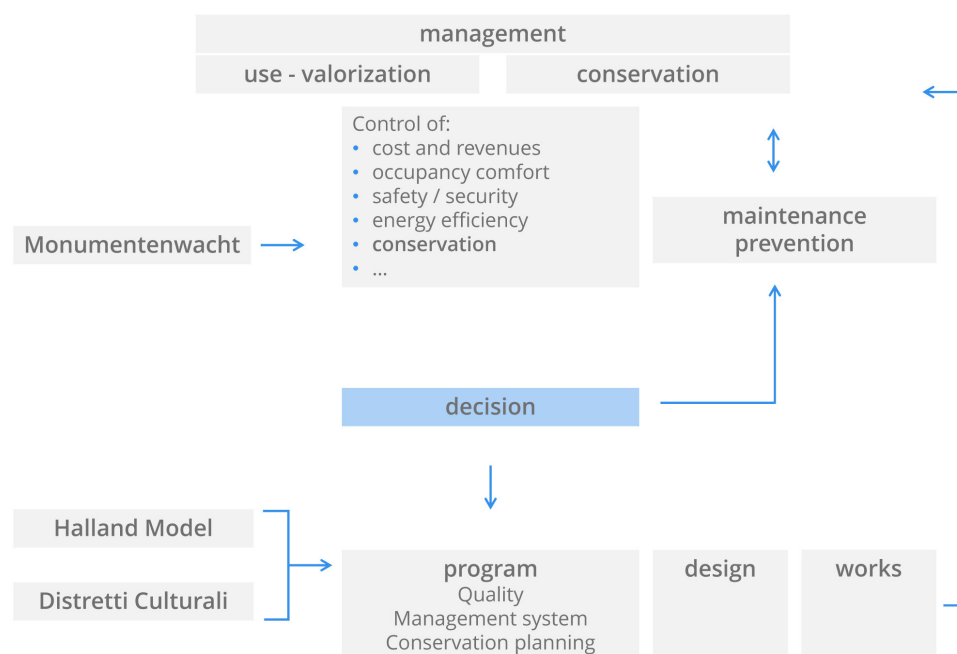
- Monumentenwacht in Belgium and in The Netherlands.
- Halland Model in Sweden.
- Distretti Culturali in Italy.

Its general aim is to identify and understand the diversity of impacts and skills related to quality protection, conservation and management of built cultural heritage.

It required a preliminary understanding of the main differences with a focus on the process working in the different phases. Therefore, a simplified chart of conservation process was designed, which enables to highlight the core activities of each analyzed model.

As planned in the project work plan, the analysis gave the required input to next action-research in the different countries, as well as to the economic investigation of impacts. It can be identified also as a first scientific achievement, as available literature on the three models did not analyse them under the perspectives of all these kinds of societal and economic impact.

The work package also includes the discussion of the main definitions related to the conservation field: preventive conservation, conservation quality, valorisation, development/growth, social capital and capacity building.



Monumentenwacht, in its purest version, is focused on the control of the state of conservation, or condition assessment, encompassing for opportunity also small maintenance works, but avoiding contamination with other phases, as this should spoil the efficacy of the model. Nevertheless it is generally acknowledged that the model has a strong, although indirect, impact on all the system, i.e. owners, public and large, research centres, etc.

The Halland model and Distretti culturali have been created in different political, socio-economic and legal frames. Although they have different targets or priorities, both work on the Program phase, using an upstream approach to solve in the meantime the problems of funding conservation works, improving conservation practices, and exploiting the making of heritage as a driver for local development.

The analysis of the three models will be performed filling in the following grid:

	Monumentenwacht	Holland Model	Distretti Culturali
Description of the model			
Conservation quality			
Enhancement of capacity / skills			
People / community involvement			
Impact on the market			
Impact on decision making			

Under “Physical Conservation” label we mean the basic target of conservation of built cultural heritage, an issue the Project will investigate in next wp’s by on field activities. Each partner is supposed to have some indicators and figures, obviously different at this initial stage of the project: it will be important to specify if the targets have been achieved by means of Maintenance plans (or Maintenance activities) and/or of better conservation works (programs and projects). The link between works and maintenance should be dealt with in the different contexts.

Under “Enhancement of Capacity/Skills” analyses are expected on the evolving attitudes of players directly involved in the process, that is Decision Makers (politicians, grant makers...), Technicians and Professionals, Public Officers, Enterprises.

The issue “Governance and social capital” has been split into three themes, that is: a) People / Community involvement; b) Impact on the market; c) Impact on Decision making. Through these three analyses information is expected on the evolving relationships between different public and private Actors, not yet directly involved in the process, but seen as the target of CHANGES.

The final results give the scientific foundations for a funding scheme providing the conditions to support the transition toward a sustainable process for protecting and managing cultural heritage.

DESCRIPTION OF THE MODEL

Monumentenwacht Model

Monumentenwacht organisations as they exist in The Netherlands and in Flanders are experienced and highly professional entities that implement preventive conservation principles. Their central rationale is timely identification and correction of defects on historic structures to reduce deterioration of the fabric and prevent major consequential damage. In practice, their core activity is supporting private and public built heritage owners and managers in the preservation of their properties through a periodic monitoring system. Monumentenwacht is also contributing to sensitisation and awareness building on the importance of maintenance for the preservation of heritage buildings and their heritage content.

The Netherlands and the Flanders Region have played a pioneering role in designing and setting up monitoring organisations under the name “Monumentenwacht” respectively since 1973 and in Flanders since 1991 (Stulens, 2006). Since the Council of Europe campaign “Europe, a common heritage” in 2000, Monumentenwacht is increasingly known in various European countries and regions. Other organisations that follow this model have been implemented in i.e. the UK (Maintain Our Heritage in Bath), Denmark (Bygningsbevaring) and Germany (Denkmalwacht). More recently there are other establishing attempts, i.e. Műemlékőr in Hungary and the Traditional Buildings Health Check Scheme in Scotland.

Monumentenwacht (MOWA) was founded with 2 principal assignments. On the long term the organisation was to realise a change in mentality through information and sensitisation of local owners and managers and on the short term it has to contribute to arresting decay of historic structures by enabling minimum intervention through periodic monitoring. The latter entails several first line activities and it is the focus of this paper. The first activity, visual inspections and condition reports, will be discussed in the next section. The second activity entails carrying out small interventions on site during inspections to avoid consequential damages. These small repairs include “opportunity interventions” such as provisional fixing of roof leakages and unblocking gutters or “example interventions” that show owners and managers a.o. how to temporarily fix flaking paint, dismantle unstable components or apply localised pest treatment. The third activity is referred to as “aftercare” and includes an explanation and interpretation of the inspection report or attending (site) meetings. The final activity are specialised activities that are not included in the standard services. These include providing advice concerning humidity problems, biological growth or insect infestation and implementing monitoring and measurement by placing crack gauges or measuring deterioration agents (climate, light, insects). The common base for all first line activities is that implementing repairs and intervention design are not part of the activities and responsibility of MOWA, as a standard owners and managers should contact specialists, e.g. restoration-architects, structural-engineers, contractors, etc.

The first line activities are all carried out by the building inspectors (*monumentenwachters*), who are the backbone of MOWA next to the staff of the umbrella organisation as this exist in Flanders. They are carefully recruited and adequately equipped specialists who are trained in industrial rope climbing and have knowledge of rope access techniques. To safely conduct a complete visual inspection, buildings require the installation of safety equipment, such as roof safety hooks or anchors. Internal spaces, particularly attics in larger buildings, sometimes necessitate interventions such as the placement of foot-beams, lighting systems, anchor points and fixed ladders. Moreover, *monumentenwachters* operate within a very specific context which requires sometimes challenging communication with laypersons, which entails understanding about feasible minimum strategies compared to ‘ideal’ quality standards but also a “generalist” understanding on many different aspects of construction being confronted with thousands of structures while gaining an in-depth insight with one single structure during an inspection (Meul and Stulens, 2010).

In practice, the *Monumentenwachters* start from a review of building records, previous inspection reports and consequently inspect the historic construction from rooftop and attic to cellar with special attention to areas that are less accessible and more sensitive to decay, e.g. gutters, roofs and attics. During this process they

perform a pathology, stratigraphic and damage analysis by noting any decay manifestations in relation to building materials and detecting discontinuities in the structural concept while paying particular attention to crack patterns and areas where damage is concentrated as a result of high compression or tensions. Thereby the aim is to understand the historic structure's complexity, environment and building features as well as the distribution of damage phenomena and causes that can affect its structural behaviour.

The reliability of the diagnosis is partially based on the applied condition reporting system, which in itself entails a comprehensive method for grouping risks, defining priorities and attributing condition ratings. In practice, the diagnosis consists of condition and maintenance reports that are drawn up by the engineer or architect of the *monumentenwachters* team. The condition report is largely based on the European standard for condition survey and report of built cultural heritage (NBN EN 16096) and the Dutch condition assessment norm (NEN 2767).

Halland Model

This paradigm presents new approaches to formulate the concept of "sustainable conservation". The concept is based on the theoretical framework of integrated conservation that incorporates its physical (materialistic), socio-cultural, socio-economic and environmental protection dimensions which have been developed within the international arena.

The Halland Model, based on an experimental and practical project, took place in Halland region (Sweden) and was carried out during the period 1993-2003. The Halland Model has been applied in different sites in the international context and it is still utilized as a strategic catalyst for sustainable regional development.

Distretti Culturali

The model has been developed in Lombardy region since 2006 on behalf of Fondazione Cariplo, as in previous years in the same region, policies had been developed on planned conservation and public "negotiated planning".

The model foresees wide-area (or urban) projects centred on built heritage innovative management and granted under the condition that clearly stated objectives include high quality conservation and sustainable management, setting up a dialogue between public authorities and various other stakeholders, with a special focus on economic supply chains, usually not involved in heritage processes.

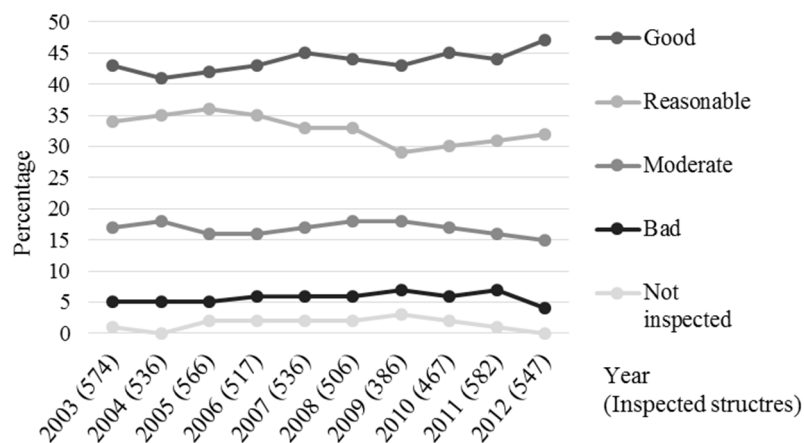
The match-granting program included six area projects (besides a pilot project started before), for a total amount of more than 60.000.000,00 Euros invested.

The project had to be tailored on the specific issues and the making of each area.

CONSERVATION QUALITY

Monumentenwacht Model

Within this specific MOWA model, built heritage is considered “ingrained” in the historic urban environment. In his in-depth research on the quality of the built environment, Dempsey (2008) argues that there is no consensus on how quality is defined. Alluding on the long tradition of advocating quality of the built environment and reviewing prescriptive theory, Dempsey states that one of the features determining the quality framework is maintenance, the central starting point of MOWA. The model is a valuable example of a cyclical preventive conservation system, a system based on periodic monitoring of the historic building stock, condition reports with maintenance instructions for owners and managers, implementation of minimal interventions and evaluation of their expected impacts. To operationalise the system in terms of organisational and production management requirements, it relies on the existence of visible damage phenomena and qualitative analysis rather than a quantitative analytical and experimental approach. This analysis entails an inductive process based on the experience gained from analysing and comparing the behaviour of different structures with similar materials and construction techniques in similar environments. Inferences from the available MOWA monitoring data show the effectiveness of this approach in site management and its long-term beneficial effect on physical authenticity and integrity of historic structures.



Graph 1 – Evolution in condition rating of slate roof covering. Data © Monumentenwacht Vlaanderen.

Thereby, the MOWA model enables spending resources to resolve the most urgent issues within the available budget. In context of structural and safety assessments, this method of operation presents a specific interest as an early warning system for long-term damage accumulations.

From a technical viewpoint, an approach for the quality management of interventions on historic buildings can be defined based on existing quality management approaches in other sectors. A qualitative process-approach starts with a well-defined management approach (outer efficiency). This approach is then translated into a management plan (inner efficiency), which leads to actions and interventions (continuous improvements). The management approach starts by defining goals and objectives. Although the general objective is the preservation of cultural heritage, for a specific building the goals should be defined in detail and they should also take into account the use of the building. The management plan will decide on the track that should be followed in order to achieve these objectives (Van Roy et al., 2015).

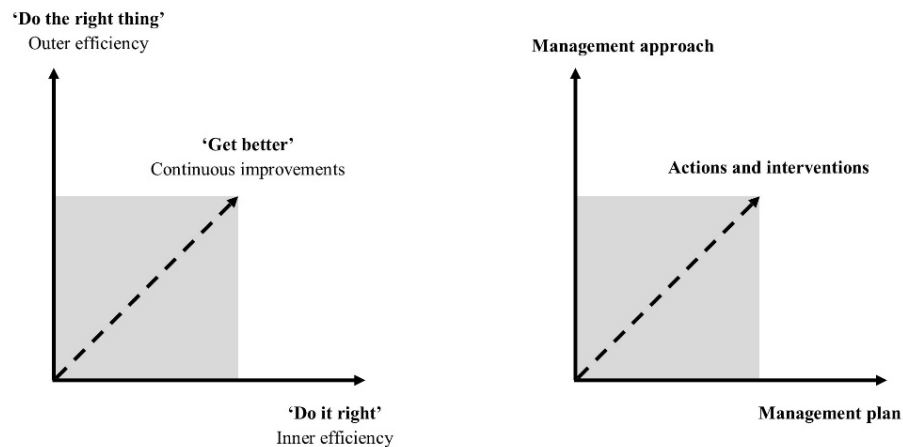


Fig. 1 – Translating the three dimensions of Lean innovation (left), adopted from (Sehested and Sonnenberg, 2011), into principles of quality management (right) (Van Roy et al., 2015).

Within heritage preservation, International Charters indicate the importance of this **process-based approach**, where each intervention (therapy) should be based on a thorough analysis (anamnesis and diagnosis) and followed by controls of the efficiency and regular monitoring (Kelley, 2013; ICOMOS, 2003; Van Balen, 1988). This iterative process is considered to be essential for the qualitative management of a historic building in practice. Monumentenwacht actively contributes to this process since they offer a relatively easy accessible service for the anamnesis and controls.

Many quality management approaches in other sectors focus on the importance of **frequent small improvements** as a means to maintain a qualitative service or product. The concept of minimal intervention is imbedded in conservation principles for heritage preservation. The regular monitoring that is sustained by the Monumentenwacht model allows to put the concept of small frequent improvements into practice and it therefore also ensures that interventions will be minimal interventions.

The concept of **stakeholder-involvement** consists of developing a general awareness that every stakeholder needs to play its part in order to obtain the required quality of a product. This was one of the strengths of the Japanese model of Total Quality Control for companies, where employees did not only understand the importance of doing their job well as part of the production process, but they also continually searched for ways to improve their work and therefore also the final quality of the product and the efficiency of the production process (Arditi, 2012; Chiarini, 2012; Cnudde, 1984). Multidisciplinary collaboration is therefore the key to durable interventions (Van Bommel, 2013). The contribution to awareness building and the enhancement of skills which are embedded in the Monumentenwacht Model sustains a stakeholder-involvement and empowers the owners of historic buildings to actively participate in the sustainable management of their building.

Halland Model

In Halland Model, the term of conservation quality has been focused on three interacted layers: conservation professionals, conservation process, and conservation technicians.

Conservation process refers to the informed decision-making process which is occurring within the stakeholders' trading zone. The trading zone aims at ensuring that conservation at all levels with different partners will respect the values and significance of the cultural heritage place where all different actors agree to achieve the goals. Conservation technicians refers to those individuals construction workers who are trained and experienced in specific conservation treatment activities-traditional building techniques and who works in conjunction with or under the supervision of a conservator. A conservation technician may also be trained and experienced in specific preventive care activities. Conservation professionals refers to those who, whatever is their profession, trade or discipline of origin (i.e. art historians, architects, archaeologists,

conservators, planners, etc.), engage in the practice of conservation and are committed to the application of the highest principles and standards of the field in their work.

Distretti Culturali

In Distretti Culturali, the term of conservation quality has been focused on the efficacy of the program phase. Based on the assumption that good condition of historic buildings starts with carefully designed works and is kept thanks to continuous care, the projects have been selected so as to implement the best skills for designs based on deep investigation, state-of-the-art survey and conservation measures, long-term vision of reuse, management system including planned maintenance and valorisation.

Thanks to the grant a number of historic buildings have been restored in a better way, and in most cases the premises for continuous care have been set up.

ENHANCEMENT OF CAPACITY / SKILLS

Monumentenwacht Model

To operationalise this large scale MOWA model in terms of organisational and production management requirements, the applied diagnosis starts from an anamnesis that relies on the existence of visible damages to establish priorities and prevent further deterioration. Thus, drawing on a qualitative analysis rather than a quantitative analytical and experimental approach. It should be stressed that this approach is not just a pre-survey or first level inspection (Augelli et al., 2005), but an inductive process based on the experience and skills of the *monumentenwachters* and the condition reporting system.

In order to correctly analyse the results of the anamnesis, the *monumentenwachters* dispose of knowledge on the quality and durability of materials, construction techniques, maintenance requirements and the results of incompatible interventions. On the one hand, this knowledge is gained from analysing and comparing the behaviour of different structures with similar materials and construction techniques in similar environments. This knowledge is commonly referred to as tacit knowledge or skills (Polanyi, 1967; Nelson and Winter, 1982) and is based on criteria that were initially decided upon and have been frequently applied with decreasing need for repeated exploration. Thereby, “the feeling that calculations are not always necessary is usually based upon an ability to size up a situation without reducing its dimensions to definite numerical values” (Machlup, 1946: 524-525).

On the other hand, the *monumentenwachters* operate in teams of two, consisting of one engineer, architect or equal by experience and one craftsman. This unique combination ensures that every inspection team includes a specialist with overall knowledge on material properties and a person with knowledge on the behaviour of materials and who is capable of carrying out small interventions. This interdisciplinary exchange is essential to the MOWA concept. As stated by Van Balen and Hendrickx (2008), workmanship should be considered into all conservation phases, as those contributions can improve the quality protection of historic structures.

Halland Model

Halland Model aims at equipping and training the construction workers in conservation techniques. The model follows the scheme of hand-on training approach by enabling construction workers to practice their knowledge and skills on historic buildings at risk. The motto for the cross-sectoral network within Halland's trading zone is: save the current jobs; save the craftsmanship; save the buildings; and generate sustainable development. Thus, Halland model considers workforce development (in terms of capacity building, skills; and readjusting capacities for construction workers in order to match the traditional building techniques and skills) as an engine and catalyst for regional sustainable development.

Distretti Culturali

The program has been founded on the assumption that asking better performances would have forced players to enhance their skills.

Along the process different behaviours have been observed, spanning from openness to opposition, to change. The latter attitude was expected and the rules of the granting program had been studied to award openness and to manage this kind of resistance.

Very often the goals set by the leaders were highly demanding for the staff: this issue has been faced through coaching, courses and the commitment of professionals toward learning and enhancing their own skills.

The more frequent challenges were networking, procurement and higher quality of design and works.

The challenge of building new relationships is one of the focuses of the model, which aims exactly at setting up alliances between actors who may have never interacted in the past, such as heritage experts, owners

and entrepreneurs. The model asks that heritage operations become the pivots of these opportunities to meet, to know each other, to set up new strategies, to make innovation happen.

As the model, at least in the first experiences, works most with the public sector, the issue of procurement proved to be very heavy, because of Italian strict and complex regulations, but also because of the requirement of selecting the best actors with a transparent process that avoided shortcuts and any easy recourse to old familiar suppliers. But this has been just one of the sides of the challenge of enhancing quality, implementing better technologies and hiring better people. The key was the anticipation of the contents of the projects, made possible thanks to the availability of funds also for the preparatory phase of the design. This, for instance, allows to pay for a very good survey of the property to restore, while sometimes (or usually) the design starts on the basis of cheap surveys, whose bad accuracy affects all the choices and the subsequent working steps.

Being forced to do better than usual, most professionals involved in the projects had the opportunity of learning and realizing outputs they would never expect before.

PEOPLE / COMMUNITY INVOLVEMENT

Monumentenwacht Model

Thanks to the report of Monumentenwacht, owners and/or managers of the heritage building are supported in their task to take care of their building as they are informed regularly on the state of conservation of their monument, even on the most hidden places. They receive guidance in the maintenance and further actions to be taken. With the recent offer for a maintenance planning document by MOWA (Meerjarenonderhoudsplanung met kostenraming (MOP) or Maintenance Cost Analysis), owners can receive a maintenance planning and a cost estimate for the next 5 years on the fabric.

In such a way the primary concerned people in the preservation of heritage are supported which allows for a positive attitude within the community.

The MOWA model also has an impact on residential neighbourhoods and cities where most people spend a large fraction of their lives and where many of their social and economic interactions take place. Specifically in context of built heritage management, it should be noted that the neighbourhood effect can also have a tangible influence on the maintenance of buildings. As Galster (1987: 4) states: "Both directly and indirectly, the social neighbourhood can influence the homeowner's upkeep decision. Directly, a strong sense of neighbourhood cohesion can encourage homeowners to maintain or upgrade their property, and can discourage them from falling below neighbourhood norms for minimal housing quality. Indirectly, homeowners' values, perceptions, and expectations, which form the basis of their upkeep calculus, may be altered by the social-interactive dimension of neighbourhood".

Since the 1980s, several researchers in social sciences acknowledge the existence of a neighbourhood effect, but it was only more recent that significant (statistic) results on its existence were found. (Ioanides, 2002) For example, Helms (2012) research on neighbourhood effects in housing renovation. By explicitly modelling the spatial interdependence of households' renovation decisions and analysing a detailed block-level data set, this study finds strong empirical evidence that endogenous neighbourhood effects exists. In this context social bonds within a neighbourhood are of importance, as they enhance the attachment of the inhabitants to the place where they live (Graham et al., 2009). In turn this can have an effect on how communities maintain their neighbourhood or can create longer-term investments in their properties.

Next to the discussion on place attachment, it is also relevant to shift the focus to individual built heritage owners and occupiers. Several interesting studies have been conducted on the maintenance behaviour of built heritage owner-occupiers. For example Hills and Worthing (2006) evaluated the degree to which owners are aware of and undertake maintenance of their building from a conservation perspective. Their results suggest that the primary motivation for owners to carry out maintenance is that the building is their home: to avoid the discomfort and financial cost of disrepair and to gain the personal satisfaction of keeping their home in "good order". Although these findings are of great importance, it is surprising to observe that while owners are keenly aware of their statutory duty in relation to their building, they do not think about nor prioritise maintenance from a cultural or heritage value perspective. Rather than an awareness of heritage values, social pressure was found as one of the main reasons to implement maintenance works. This could easily lead to prioritising esthetical improvements over more practical or functional maintenance, such as clearing the gutters or repairing leaks in the roof. Considering that owners and managers play an important role in the MOWA model, this is an opportune method to increasingly involve and sensitise both the public and building owners-occupiers. Moreover, the close interactions between *monumentenwachters* and owners-occupiers can significantly increase their prior knowledge of house defects on upkeep decisions and maintenance quality expectations.

Halland Model

Halland Model indicates that the future of heritage buildings can be ensured through the active involvement of communities and when heritage constitutes a vital component of sustainable regional and local

development. In Halland Model, the decisions made within the trading zone where different actors, including local community, present their interests, values, and visions to achieve the main goal and objectives. In Halland Model, the community is a major stakeholder and it can be defined as a group of individuals, construction workers, buildings owners, within a larger society in which they exist, have consensus (within the trading zone) and share a common interest in the future of their heritage. The community's role aims to give the heritage buildings a function in the life of the community and to integrate the protection of that heritage into comprehensive planning programs. Halland Model shows the importance of community-driven conservation and local empowerment through the a bottom-up (trading zone) approach for heritage protection through the active participation of local communities and different stakeholders and ensuring a role for the community in the decision-making process. The model indicates that cultural heritage can play an important role as a driver for community-based socio-economic development.

Distretti Culturali

The issue of getting people involved is crucial to the model as it works mainly through the public sector. This entails the risk that representatives use to capture the process, setting the aims in ways that are not for innovation but for the conservation of existing order, which often impairs any change and any real development.

Therefore a communication strategy has to be declared, which can clearly work through people involvement and not just advertising and building a superficial consensus.

Community involvement goes far beyond spreading information. It requires the involvement in the process from the beginning, not only in the selection of the strategies and the actions, but also taking part in the business models by which heritage places will be run.

Distretti Culturali model encompasses all the opportunities to foster these participatory strategies, so that in the experience carried out this was one of the evaluation criteria.

IMPACT ON THE MARKET

Monumentenwacht Model

In theory, the condition report that owners and managers of historic constructions receive is the perfect basis to set up a maintenance plan and implement interventions. However, in practice this constitutes the main gap in the MOWA model. Ongoing academic research and qualitative data collection in context of the PRECOM³OS UNESCO Chair reveal that main cause for this failure is an inefficient maintenance market. When MOWA was initially set up, it was assumed that this market would be self-regulating, “since, through the status reports, the attention of the owner or administrator is drawn to the needs of the building, Monument Watch actually generates work” (Binst, 1997: 17). The identified market failure causes are complex, non-linear and cannot be attributed to a single market participant or utility of the service that is being traded. Within this larger context, MOWA in the Flanders Region is setting up mechanisms to tackle very specific problems. From a 2011 member survey based on random sampling, it was observed that next to expected budgetary reasons the main reasons for not implementing therapy was the lack of specific work instructions and problems in finding accommodating contractors (Monumentenwacht, 2011). In response MOWA developed a new service in 2011, Meerjarenonderhoudsplanung met kostenraming (MOP) or Maintenance Cost Analysis, which offers tailor-made reports that translate MOWA maintenance recommendations into work instructions and cost estimates over a period of 6 years for building owners and managers (Vandesande et al., forthcoming). Several pilot cases show that MOP can serve as a trigger for private owners and managers to invest in maintenance works or at least most urgent repair works according to their available budget. The long-term implementation effects, impact on the condition of historic structures and continuation after a 6 years period can at this time not be assessed.

Financially supporting a monitoring system for a single building is practically impossible, but can be achieved when the scope is enlarged. Operationalising the MOWA model can gradually demonstrate the importance of preventive conservation to owners and managers of historic structures and build capacity among stakeholders to implement maintenance works. On the other hand, contractors, who do not realise the benefit of small maintenance works (Feilden, 2003: 238; Wood, 2005: 29), can become involved with these lower income value activities when there is not one building owner but a whole community in its neighbourhood that requires similar interventions. This dynamic can lead up to what is called agglomeration economies in city-regions, or geographical concentrations of a market that cannot be explained by the presence of natural resources. To define the optimal agglomeration economies and most efficient conditions for local maintenance markets, more research has to be conducted on different organisation and production management options in terms of lot-size depending on set-up cost and price per unit based on economies of scale. Thereby, attention should be paid to core capacity building which is traditionally treated as a cluster of distinct technical systems, skills, and managerial systems. In the specific context of built heritage these capacities are deeply rooted in values and skills, which constitute an often overlooked but critical dimension.

Holland Model

Built cultural heritage successively has become regarded as an enormous treasure; which is elucidated in the tourism industry. Increased interests have been directed to the economic values of cultural heritage. Holland Model experiences found a major impact on economic development and regional growth. The experiences of Holland Model show that the local heritage buildings and well preserved urban environment have been given a new role: as a crucial part of a city brand and at the same time an illustrator of the city qualities and competitive advantage. These ambiances characterized by integrated conservation of the built environments, are the conclusive importance for attracting innovative industry and the creative class in their choices to move to a new inclusive sustainable city.

Distretti Culturali

The model is implemented through important granting actions, which make possible interventions on tangible heritage big enough to force decision makers to deal with the required changes.

Therefore the impact on local economy is not negligible, but the real impact has to come in progress of time, if the chosen strategy is sustainable and the processes don't stop as the grant has been spent.

Strategies are different, as they should be customized to the different territories, but in general they should encompass an empowerment of the market actors, as new businesses are identified and triggered, and a set of key persons enhance their skills, which produce benefits to all the local system.

IMPACT ON DECISION MAKING

Monumentenwacht Model

The MOWA models' impact on decision making is largely situated in 3 different built heritage management stakeholder groups. Firstly, in terms of governance actors, MOWA's first line activities and large scale data on the maintenance needs entail a valuable decision making source. State or local governments can use this data to assess the actual maintenance needs within their territory. However, MOWA can within the current organisational context not directly influence government actors as resource investments are not within their competency scope. Secondly, the main actor group influenced by MOWA's visual inspections and condition reports are the actual owners and managers of built heritage. Several interesting studies have been conducted on their maintenance. For example Hills and Worthing (2006) evaluated the degree to which owners are aware of and undertake maintenance of their building from a conservation perspective. Their results suggest that the primary motivation for owners to carry out maintenance is that the building is their home: to avoid the discomfort and financial cost of disrepair and to gain the personal satisfaction of keeping their home in "good order". Although these findings are of great importance, it is surprising to observe that while owners of protected buildings are keenly aware of their statutory duty in relation to their property, they do not think about nor prioritise maintenance from a cultural or heritage value perspective. Rather than an awareness of heritage values, social pressure was found as one of the main reasons to implement maintenance works. This could easily lead to prioritising esthetical improvements over more practical or functional maintenance, such as clearing the gutters or repairing leaks in the roof. Considering that owners and managers play an important role in the conservation process, MOWA presents a clear opportunity to increasingly involve and sensitise both the public and built heritage owners and managers. Moreover, in view of a sustainable management strategy for built heritage another significant factor is MOWA's contribution to owner and managers' prior knowledge of house defect impacts on upkeep decisions and maintenance quality expectations. Finally, several pilot cases show that MOP can serve as a trigger for private owners and managers to invest in maintenance works or at least most urgent repair works according to their available budget. The third stakeholder group are the actors who design building interventions and implement them, i.e. engineers, architects and contractors. Next to providing them with valuable decision making information through condition reports, MOWA's "aftercare" service includes an explanation and interpretation of the inspection report to the designing actors or attending (site) meetings.

Halland Model

The decisions made within Halland Model can be compared to what Sverker Sörlin regards as a trading zone. In this model a cooperative decision-making process has been contributed in the long term to more relevant and sustainable systems of built heritage protection. The model encouraged to follow an effective heritage management approaches and related legislation which encourage a greater role for the communities and different stakeholders concerned, as well as highlight the integration/adaptation of traditional heritage management approaches to contemporary daily life and current socio-cultural and socio-economic contexts. The decision-making process applied by Halland Model is stakeholders' cooperative consensus. The consensus process helps different groups to develop decisions that all members can live with, by focusing on addressing their concerns. Trading zone process is based on the assumption that every stakeholder has a valid perspective that is crucial to making good decisions. It requires everyone in the group to be committed to common goals that are clearly understood, and to be able to differentiate between their personal preferences and what will help the group achieve its goals.

Distretti Culturali

The decision-making process has a central role in the Distretti Culturali Model.

The model works on giving the right contents to programs that have to be put in the politic agenda, via a process of trading/sharing, which should involve citizens, organizations, companies, etc.

These attitude can be definitely new for many actors, and the openness to these forms of cooperation could be a real innovation step, which can be described as building the capability to set up complex projects/policies.

This is a decisive kind of enhancement, and decision making becomes able to deal with heritage in an “upstream” perspective, enhancing the available funds and allowing policies which enable more innovative practices.

DEFINITIONS

Preventive conservation

Preventive conservation is a built heritage management approach based on maintenance, periodical monitoring and a planned intervention process. By addressing deterioration causes and facilitating early damage detection, intervention is kept at a minimum. This process ensures the physical integrity of built heritage, reduces long-term costs for owners and managers of built heritage and enables the empowerment of local communities in dealing with heritage.

“The successful preservation of a historic building, complex or city depends on its continued use and the daily care and maintenance” (D’Ayala and Fodde, 2008: xv). However, preventive conservation should not be understood as solely scheduled maintenance. The least destructive approach for all interventions which inevitably occur in the conservation process, is a planned process based on a thorough understanding of the building and long-term vision for prioritising interventions. Considering that historic structures themselves are the most important knowledge source about historic materials and construction techniques, these minimum interventions are absolutely essential to guarantee quality within the built heritage sector. As argued by Feilden (2003: 236) “minimal intervention can only work by utilising regular inspection”. Since the 1990s, a pro-active approach towards monitoring has indeed become an important development in conservation field. “This emphasis is the reflection of the growing commitment to improving management frameworks for care of cultural heritage through the use of monitoring, which is understood as a key component of the management process” (Stovel, 2008: 15).

Therefore, the following classes of preventive conservation for built heritage are defined, based on the classification of disease prevention in medicine (Gordon, 1983):

- Primary prevention: avoid the causes of the unwanted effect (damage).
- Secondary prevention: condition-assessments and monitoring to enable early detection unwanted effects (damage) and respective symptoms.
- Tertiary prevention: avoiding further spread of the unwanted effect (damage) and the formation of new unwanted (side) effects (damage).

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Conservation quality

The conservation quality of interventions on built heritage stems from the aim (preservation of cultural significance, performance, durability) and the conservation process (management, knowledge enhancement, stakeholder involvement).

1. **Process-approach:** the intervention is part of a process that consists of monitoring, planning and technical actions with the aim of preserving cultural significance. The management approach starts by defining goals and objectives. Although the general objective is the preservation of cultural heritage, for a specific building the goals should be defined in detail and they should also take into account the use of the building. The management plan will decide on the track that should be followed in order to achieve these objectives (Van Roy et al., 2015).
2. **The importance of knowledge:** every action should be based on a clear understanding of the building, the environmental conditions and the social conditions.
 - Required knowledge on the building: condition assessment, characteristics of materials and building components, understanding of the functioning of the building and its components.
 - Required knowledge on the environmental conditions: understanding of weathering conditions and subsoil activities.
 - Required knowledge on the social conditions: understanding of cultural significance (value assessment), understanding of the urban landscape (integration, functioning), understanding of existing regulations (safety, policies, ...), understanding of the available budget.

Therefore, the conservation quality depends on:

1. The efficacy of the process.
2. The accuracy of the understanding of the building, the environmental conditions and the social conditions.
3. The balance between technical, functional, economic and social performances.

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Valorisation

The term Valorisation has been only recently applied to cultural heritage. The same word is generally used to translate the German "Verwertung" (specifically Kapitalverwertung) proposed by Karl Marx and economists of culture who introduced the concept of "Cultural capital". The term is also used in various fields and in EU documents with reference to making the best use of an activity or getting the best value out of it for all the stakeholders concerned.

As applied to built cultural heritage, the same term is ambiguously used both in the real estate sector, stressing the use value of historic properties and sometimes denying the acknowledgement of cultural values, and for the activities addressed to involve public in the use. A tendency can be detected to understand valorisation as the complex of the activities directed to harvest funds through tourism and exploitation of heritage contents.

In academic field and in the context of CHANGES project, valorisation should be correctly understood as the complex of the activities aimed to enhancing and disseminating knowledge and awareness of cultural values and conservation issues. This should be a mandatory mission in the management of heritage properties.

This definition implies that, as far as the reuse of the premises and related use and communication activities can generate financial returns, they should be reinvested to support conservation activities, and valorisation itself.

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Development / Growth

Development and growth are often used as synonyms, while in this report they have to be considered with two different meanings and definitions, since they refer to different areas of interest. In the following paragraphs it is also helpful to stress two others concepts: sustainability and limit.

At the end of 1960s and during the 1970s, the discourse about growth and development started in the environmental field, due to the rising awareness of the limits of natural resources, of the effects of the unlimited exploitation and of the consequences of pollution. In this context the misleading overlapping of growth and development appeared with the Meadows report "Limits to Growth" that has been sometimes translated in other national contexts as "the limits of development".

In the course of time, development and growth have assumed more and more an economic, it would be better to say a financial, meaning, but for our purposes it is useful to take some distance from definitions strictly oriented to economy and production in order to enable us to focus better on the role that the cultural component plays in the perspective of a development centred on human, intellectual and relational capital.

In this perspective the term "growth" refers to the tendency to (unlimited) production of richness and consumable objects, measurable in quantitative terms. While "development" means a dynamic path of evolution and qualitative progress, based on the concepts of equity and access to fundamental rights, shifting the attention from the objects to the persons. The etymology of the word "development" is to unroll, to unfold, the opposite of binding and wrapping up, which gives an idea of something in motion. Furthermore, it could be said that the idea of development includes the concept of progression in time and of a process of dynamic phenomena which favour qualitative aspects. Thus it is possible to say that using "development" means focusing on the process more than on the results.

Development, even more when is meant as growth, should always be considered along with the idea of limit. Not just physical limits, that is borders, but "temporal" and "dimensional" limits: it is not possible to exploit resources, whatever these could be (natural, cultural or human) for an infinite quantity and, above all, for an infinite time. Consequently, the "Time" factor appears and serves as a regulator of development dynamics.

Development in the course of time became a multidimensional concept, enriching the original meaning of many different nuances. For this reason, the definition of development has become so wide and extensive that often it is linked to a second term which defines the background, such as "sustainable development": development is sustainable when it "meets the needs of the present without compromising the ability of future generations to meet their own needs." (WCED, 1987: 16). It is important to highlight that adding the adjective "sustainable" is not automatically against the idea of economic growth based on the exploitation of resources. Therefore, it is important to clarify that sustainable development aims at maintaining and improving our environment on the long term through a dynamic development process that sustains, not substitutes, every resource. This approach is appropriate for the field of the conservation of cultural heritage and leads to a strong sustainable development which implies the idea of a long term conservation process of a capital (cultural heritage) not replaceable nor compensable, stressing the concept of limit of the resources and of limit as temporal horizon.

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Social Capital

The first systematic contemporary analysis of social capital was produced by Pierre Bourdieu, who defined the concept as “the aggregate of the actual or potential resources which are linked to possession of a durable network of more or less institutionalized relationships of mutual recognition” (Bourdieu, 1986). Robert Putnam argues that physical capital refers to objects and human capital refers to the properties of individuals. Social capital refers to connections among individuals that in turn form social networks. Within these networks the critical norms of reciprocity and trustworthiness arise that establish the foundations for a cohesive society. In that sense social capital is closely related to what some call civic virtue.

The difference is that social capital calls attention to the fact that civic virtue is most powerful when embedded in a sense network of reciprocal social relations establishing normalized communication and cooperation among people and different groups. A society of many virtuous but isolated individuals is not rich in social capital (Lefebvre, 1991). The World Bank uses the term social capital to refer to institutions, relationships, and norms that shape the quality and quantity of a society's social interactions: “social capital is not just the sum of institutions which underpin a society-it is the glue that holds them together. The point in that definition as with the observations made by Bourdieu and Putnam is that social capital refers to normalized relations that lead to the social institutions that help insure stability in societies with divergent groups. Social capital can be seen to be stock of active connections among people that build trust, an appreciation for different perspectives and needs, and shared values. It is those shared values that bind the members of human networks and communities to a society and make cooperative action possible (Ijla, 2012).

The importance of social capital

The notion of social capital is a useful way of entering into debates about civic society in relation to space and time, and it is central to the arguments of Robert Putnam and others who want to reclaim public life. It is also now being used by the World Bank with regard to economic and societal development and by management experts as a way of thinking about organizational development (World Bank, 2007).

There are several benefits from a rich reservoir of social capital. First, social capital allows citizens to resolve collective problems more easily. People often will be more successful if they cooperate, with each doing her/his share. Secondly, social capital allows communities to advance. Where people are trusting and trustworthy and where they are subject to repeated interactions with fellow citizens, every day business and social transactions are less costly. Thirdly, social capital widens each group's and each individual's awareness of the many ways in which their interests intertwined with those of others. Fourthly, those individual who join with others can through their associations become more tolerant, less cynical, and more empathetic to the needs of others.

When people lack connection to others, they are unable to test the veracity of their own views, whether in the give or take of casual conversation or in more formal deliberation. Without such an opportunity, people are more likely to be swayed by their worse impulses (Ijla, 2012).

Cultural heritage and social capital

In the seminal work on social capital focusing on Italian regions, Putnam et al. (1993) pointed to the fact that the resources of social capital are dependent upon long-term historical development processes. The strength of social capital reflected in the density and quality of social links and networks in a given area may thus be its heritage per se. The feeling of connectedness, trust and the existence of traditional ways of transmitting skills as well as the wealth of traditional craft, production and agricultural activities may constitute basis for the development of selected industries and creative activities in certain historic regions, being an important asset for local development (Kupisz and Działek, 2013).

Cultural Heritage is able to contribute to the building of social capital by strengthening local identity, community participation and social cohesion by means of cultural and educational activities or other related

to their conservation and valorisation (Putnam, 2000a; Kupisz and Działek, 2013), as well as thanks to the availability of public spaces, such as squares, city historic centres, parks, and historic buildings like museums, libraries, etc. (Newman and Jennings, 2008; Kupisz and Działek, 2013). Moreover, the use of social capital resources could encourage the participation of the local community in consultations and in decision making on urban regeneration policy (Kupisz and Działek, 2013; Cento Bull and Jones, 2006; Blakeley and Evans, 2009).

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Capacity Building

According to UNCED (1992), capacity building is the ability of people and institutions to deal with questions related to policy choices and development options taking into account the environment potential and limits as well as the needs of the people. In particular, it includes the human resource development, the organizational and institutional development, and the legal framework development (UNDP, 1991; UNCEPA, 2006), (fig.1). For its achievement is necessary a long-term process and the participation of all stakeholders, such as ministries, local authorities, non-governmental organizations and targeted groups, professional associations, academics and others (UNDP, 1991), (fig.2).

Although the most frequently used specifications of levels is: individual, organizational, and institutional, it is necessary to point out that exist many variations on this theme (fig 3). It is not possible to offer clear cut definitions about levels, and it would not be wise to try to do so. Each agency needs to define the levels that are appropriate for their particular mandate and context. The achievement of sustainable results depends on the linkages between levels and the complexity of the whole system (UNECED, 1992).

During the past century and until now the lacking/poor protection and management of cultural heritage around the World evidence the necessity of capacity building in the field of conservation in order to respond to the needs widely identified by heritage institutions, universities, governments, and local communities around the world (Kaplan, 2000).

The objectives of capacity building in the field of historic conservation could be summarised as follows:

- To strengthen the capacities of institutions working in the field of immovable cultural heritage conservation and management.
- To offer an academic and technical network where the dynamics between conservation, management, and development are analyzed and viable solutions for specific projects and case studies are proposed (Smillie, 2001).
- To educate, train, and raise awareness of cultural property as an integral part of the conservation process. Education and learning should target all sectors of society at every level, including schools, universities and vocational centres and training is the process of improving capabilities, building capacity and enhancing the performance of workers and professionals in their specific fields of expertise (Ijla and Atrash, 2013).
- To raise awareness aiming at improving public perceptions and knowledge about the cultural significance of cultural heritage, its fragility and value, and about conservation work. The process of raising awareness should target the community at every level, including decision makers and civil society institutions.
- To strengthen international cooperation. This refers to the interaction between local institutions and individuals with various international institutions. (Ijla and Atrash, 2013).

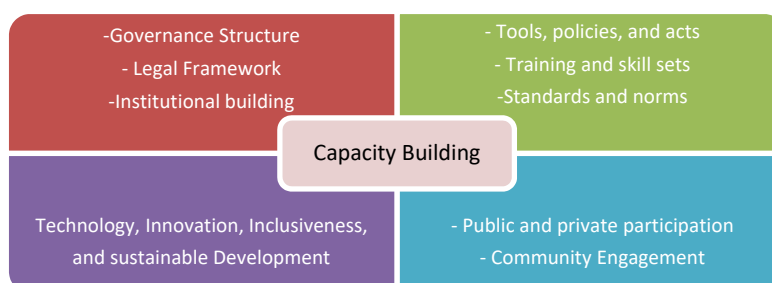


Fig. 1 – Capacity Building: Key Components, source: Changes project professional discussion panel, Visby, 2015.

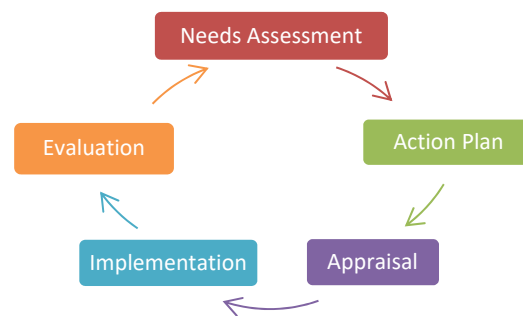


Fig. 2 – Capacity Building Process, source: Changes project professional discussion panel, Delft, 2016.

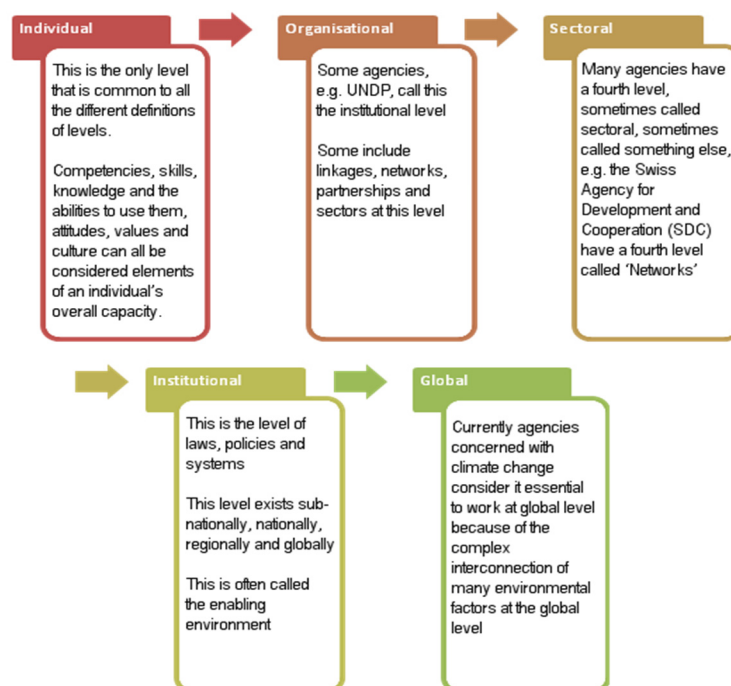


Fig. 3 – Source: Capacity Building - Agenda 21's definition (Chapter 37, UNCED, 1992).

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