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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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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.

WP7**ANALYSIS OF ECONOMIC AND SOCIETAL IMPACTS AND
EXTERNALITIES OF VALORISATION STRATEGIES INCLUDING CONSERVATION ACTIVITIES****Responsible**

Principal Investigator 4: Prof. Christer Gustafsson, Uppsala University.

Partners involved

- **Principal Investigator 1:** Prof. Stefano Della Torre, Politecnico di Milano, Department of Architecture, Built Environment and Construction Engineering.
- **Principal Investigator 2:** Prof. Koen Van Balen, KU Leuven, Building Materials and Building Technology Division.
- **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.

Methodology adopted

Desk analysis.

Timing

November 2015 – November 2017

Abstract

Conservation implies production of values and needs a process of articulation. It cannot be seen as a procedure where something has been taken out of the material and economic circulation. The decision to conserve a historic building is a complex process based on cultural, historical, economic and political aspects. It may be described as a successfully concluded articulation of meanings and values. In such context, the trading zone is a lively commercial, scholarly scientific and political marketplace where various traditions, methods and languages related to the actual stakeholders involved have to be understood and combined. When a trading zone exchange occurs, a common language of communication is developed across the borders between different disciplines and practices.

The actors in conservation projects are operating simultaneously on several levels, trying to solve specific conservation matters according to conservation principles, as well as designing conservation projects according to all-embracing regional development policy. Operative issues of concern in this work package were related to policies, values, facts, resources and legal frameworks.

Of interest to study in this context were:

- Who are the actors of a conservation project/process?
- Which are their objectives and policies?
- How did the actors fulfil their objectives and policies?

Link to other WPs

WP7 represented the elaboration of data gathered during the WP3, WP4 and WP5.

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INTRODUCTION

The conservation of cultural heritage concepts change often through the interaction between different actors and groups. Those actors have different interests and objectives; however, trading zone offers forum for exchanging their ideas and building understanding which allows the actors to communicate and create new cooperative-collaborative ground for consensus and agreement.

The actors in conservation field work on different levels of decision-making process as well as in different fields and backgrounds, yet each actor sees the conservation process according to her/his understanding of conservation principles.

In Work Package 7 the Halland model, Monumentalwacht in the Netherlands and in Belgium, as well as Cultural Districts in Italy and their trading zone have been studied closely. This has given the opportunity for various stakeholders with different objectives, values, policies, resources and legal framework to present their objectives, strategies, and goods to achieve the established goal of regional development.

CHANGES team has a very deep experience in conservation projects in the different countries of the participants (Italy, Belgium, Netherland and Sweden), and each experience has its strong and opportunity outcomes as well as some barriers. WP7 seeks to understand the regional development impact of these projects and how conservation polices play an important role in such development.

METHODOLOGY

CHANGES partners agreed to conduct an analysis of their practical experiences to understand policies, gained values, and the legal framework which leads to regional development as a result of historic conservation project.

Accordingly, CHANGES project was looking to gather the needed information to sum up WP7 by asking the partners to answer the following open-ended questions:

1. Who are the actors (name them) of a conservation project and process? (Public-regional, national, local-Private, civil society, universities, churches etc.)?
2. What are their goals, objectives, interest, and what are the policies that they follow?
3. Which mechanisms, action plans, and procedures they utilize to achieve their projects?
4. What are the major resources they invest in their projects (human capital, capacities and financial)?
5. Why do you think that your experiences are successful and what are the obstacles and barriers that you face/d in your work?
6. How do the different actors reach to an agreement on their conservation plans and projects?
7. What are the major results that you concluded from the SWOT analysis of your experiences?
8. How do you see the future in terms of recommendation to make the projects more durable, sustainable, and to ensure the continuity of historic conservation projects?
9. According to your experience, can you explain your structural vision about how the decision-makers have to connect between historic conservation planning and the sustainable development, especially the workforce development?
10. "Nowadays, we conduct historic conservation projects and we decide for which purposes (Heritage Supply), but we rarely consider (Heritage demand) heritage as part of the national-regional and local strategic plans. Kindly, can you explain this term from your experience and institutional perspective?

Questions 6 will be useful for us to know about the durability and continuity of Monumentenwacht projects and activities in terms of availability of funding, cooperative planning, efficient decision making system, the role of the private sector, the flexibility of technical regulations and rules (many architects or conservators have different philosophies and ideas aiming at conducting conservation projects and these ideas varies from one project to another according to construction system, stability of the structure, the purpose of the reuse and the adaptive reuse etc).

Questions 7 asks about the MAJOR results (crucial points) that you recommend us (CHANGES leadership and project) to high light and to stress in our final report. We will be happy to gain from the Flanders SWOT experience.

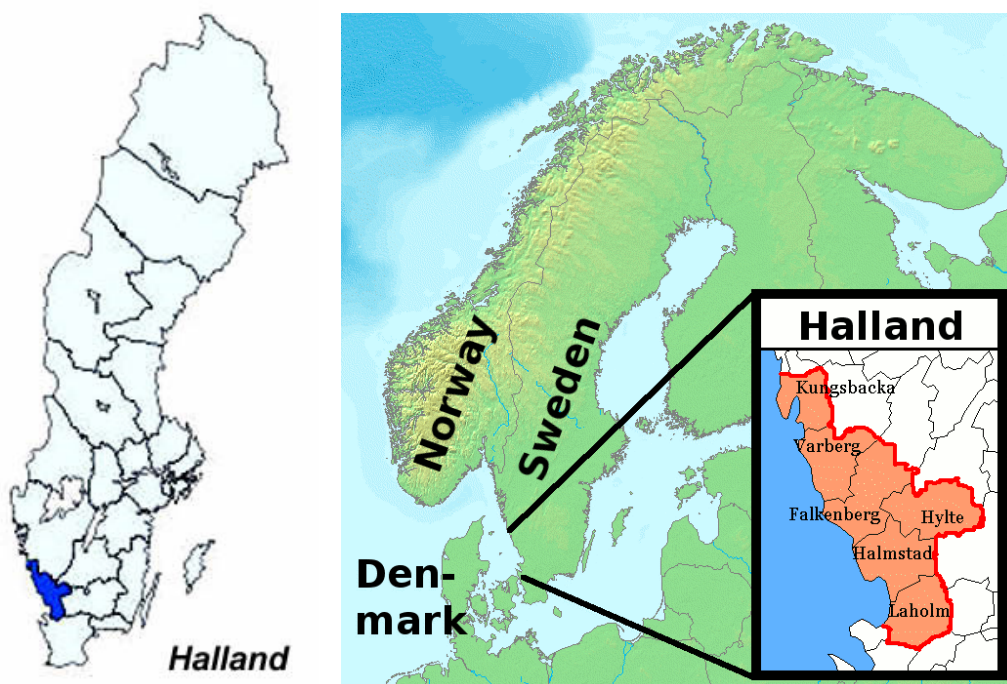
Question 10 is more academic and the idea is that the government, the market, the owners, the conservators, the municipality etc. usually decide which historic conservation we need in isolation from the national and regional cultural sustainable development plans. We argue that the traditional track which current conservation practices follow considers cultural heritage can play a marginal role in the development schemes and strategies which drives conservators and academics to face the challenge of this thread and push them to struggle for protection and the development activities within the field of cultural heritage. On the other hand, we can see that theatre, arts, music, etc. take a very interesting place in the national and regional cultural development plans and the cultural institutions (governmental and private) looking to these branches as pressure of demand.

The question is: how can one make such shift in the field of conservation. Shift from marginalized place in the development plans to become one of the major player in these schemes. Shift from "supply" to the community to be a "demand" as an answer to the community needs.

THE HALLAND MODEL

The Halland model managed to bring different actors to share and to trade their values and interest through face-to-face negotiation, bargaining in one collective forum to engage in consensus-oriented decision making. Despite that trust building and shared understanding shows that these forums focus on “small-interim wins”, the model needs to be development to face the shortage of financing and deficiency of successful public policy.

The Halland Model for sustainable building conservation is a theoretical and practical-experienced model aiming at nurturing regional development based on sustainable principles. The Region of Halland is situated in the west coast in the south of Sweden. The regional joint venture, the Halland Model, includes workforce development, the construction industry, the historic built environment sector, real estate owners, local and regional authorities and trade unions.



The conservation projects (the footing and grounds of the Halland Model) were started during 1990s recessions aiming at increasing the total volume of construction and to absorb the unemployed construction workers within the projects' activities. The main objective of the scheme was: "Save the jobs, Save the craftsmanship, Save the buildings". A fourth motto was introduced already in the first year: to establish new activities aiming at inclusive, sustainable and innovation-driven development on the improved premises. The model was soon developed into a regional cross-sectoral joint-action network aiming at sustainable growth. The aim also was strengthening competitiveness, sustainability including use of renewables and reuse/recycling of materials, adaptive re-use of the conserved and restored historic buildings, and development of planning building conservation initiatives and investments.

The Halland Model was initiated as an application oriented theoretical platform and a new historic conservation model, providing adequate approaches to solve the economic challenges in a sustainable approach (Gustafsson, 2009). A basic and entrepreneurial model is developed where the "trading zone" is defined as an active arena for negotiations and exchange of services or a field of force corresponding to the actors' policies, values, facts and resources.

The region of Halland has been applied as the research methodology due to the fact that it was identified as heritage conservation area based on Halland Regional Museums which reported on approximately forty

historic buildings at risk, to be suitable for conservation in the framework of the Swedish government stimulation and fund package aiming at revitalizing labour market sector within the construction industry. Yin (2003) defines the case study research method as an experiment which investigates a contemporary phenomenon within its real – life context. In this project, the researcher seeks to answer of the hypothesis by selecting small geographical area as the subject and investigate contemporary real-life phenomenon through analysis of a limited number of events. The information gained mostly comprised of opinion based on facts, personal experiences with Halland model project, supporting data, information and objective evidences.

In the Halland Model, more than 1,200 building construction workers and apprentices were employed and then trained in traditional building techniques operating in conservation projects at about 100 historic buildings at risk, under supervision of skilled craftsmen and conservation officers. Selected objects include castles, windmills, industrial sites, dwellings, warehouses, theatres among others.

After the completion of conservation work the improved premises made new functions available inspiring the start of several new businesses. The chosen buildings were seen as resources to be taken advantage of and to develop. Preserved built environments are often seen as attractive for dwelling and if used properly they can be an integral part in trade activities and other businesses and even increase their market value. This is one of many added values which have come out of the model. About 150 contractors and suppliers have been involved and about 350 new jobs have been created directly depending on the execution of the Halland Model and about 200 indirectly. The Halland Model has been exported e.g. to Russia, Poland, Lithuania and Iceland as regional project for sustainable development and the experiences of the Halland Model has been disseminated in several conferences in other parts of the world.

The overarching Halland Model gives good examples on managing of environmental and economic performance without diminishing the cultural value and social history in built heritage (Ferilli, Gustafsson and Sacco, 2017). Adaptive re-use of historic places, spaces, and spatial implies that the concept is not only building on the three pillars of sustainability i.e. environmental, social and techno-economic, but also manages to enhance the five capitals: human, environmental, social, financial and manufactured capital as described by the Royal Academy of Engineering in London (The Royal Academy of Engineering, 2005). The Halland Model has a direct and indirect effect and multipliers within local community and regional levels.

Besides that, in gaining primary data the researcher also conducted constructed interviews and goal-oriented interview among community members, workers, buildings owners, local labour market board, municipal authorities, construction sector, heritage sector etc. From the personal observations and experience of the author (Gustafsson, 2009) and interviews, the researchers know how reliable the data is and that it is up-to-date. Understandings gained about different concepts and issues of heritage conservation from secondary data were accumulated and compared with the findings from the author's observations and stakeholders' interviews. Study on implementation and application of conservation plan by municipal authorities and the project leader were also conducted. From the case study and literature review, an evaluation of the current strategies and mechanism of the Halland model used by selected municipal representatives was done.

Through the author observations conducted on designated buildings and sites, evidences of cultural, social, and economic activities can be addressed. Halland building conservation model has been targeted cultural, social, and economic buildings with significant historical values within the area of study. Throughout the observation and interviews it was found out that these buildings have an architectural significance that makes the character of Halland's historic image.

Field research tool

Research on relation between conservation of cultural heritage and sustainable development, based on multidimensional cooperation with a multi-problem-oriented approach, and demands the use of sound qualitative methodology and different research tools in order to explain multi-stakeholder collaboration and coordination includes representatives from trade union, labour market, construction industry, academic

society and the civic sector. Research on such comprehensive joint-ventures and on finding an adequate way of studying the diverse relations and decision making within different systems of policies and values requires an interdisciplinary theoretical approach based on several disciplines, with wide perspectives dealing with sustainable development.

The objective of post-modelling research and analysis is to advance the model to meet the current challenges related to sustainable integrated conservation approach, strengthening regional competitiveness and sustainable regional development. The aim of the interviews are to obtain views from local community, labour market, heritage fields, municipal representatives, buildings owners, and academicians about the key issues surrounding the sustainable historic conservation and its impact on regional development. In support of this aim the objectives of the interviews are to investigate whether integrated historic conservation is more likely to achieve the sustainable tenets and to have consensus among stakeholders that historic environment sector can create a proactive role and being leading component in regional development policy. To pursue these objectives, it was decided to ask relevant stakeholders to the following questions:

- How necessary is historic places in their physical characteristics and their social life for a community cultural pride and identity?
- How policy makers and local community can utilize historic conservation to promote economic growth and make provision for development to meet the economic and social needs of the community?
- Over the past several years, would you say that the quality of historic conservation in Sweden has gotten better, remained the same, or gotten worse?
- Conservation policy has wide effects results in conflict. Some of the obvious sources of conflict are between: developers and conservationists, owners/investors and conservationists, local authority departments competing for limited funding, and elected members and local authority professionals. How useful to solve this conflict?
- In the context of growing unemployment in Europe, Halland Model shows the impact of heritage on the job market seems particularly relevant. How can conservation-related construction, repair, and maintenance jobs be designed as policy for regional development?
- How can historic conservation be financed? What mix of private and public resources, i.e. public-private partnerships, should be used?
- How can political support to historic conservation be generated and maintained?
- How can a national policy in support of historic conservation be established?
- How can the affected population participate in the formulation and execution of conservation schemes?
- In your opinion should Halland Model has the opportunity to be a potential strategy for Smart, Sustainable and Inclusive development in Europe?
- Concerning (international) conservation principles; which had the highest quality: the Halland Model projects, conservation projects only financially supported by the heritage sector or ordinary conservation projects? - Why?
- What kinds of challenges were the participants facing?
- How can experience from the Halland Model contribute to increase knowledge about designing, leading and organising complex cross-boundary projects?
- The participating actors had their own agenda, but how was it possible to create common objectives, and how was it possible to achieve targets set?
- Why and how were specific decisions made?
- Are there any questions or issues that you feel we should have asked about?

Research question

Peter Galison introduced the concept of trading zone as a useful instrument for understanding innovation processes in the field of science (Galison, 1997; Balducci and Mäntysalo, 2013; Gustafsson, 2009; Salvador Muñoz Viñas, 2005; Sverker Sörlin, 2001) regarding to the trading zone, and it evaluates the sustainable

effects Halland model and historic conservation projects on boundary-spanning challenges for regional development, strengthening competitive and innovative advantages of the region. The research design allows the paper to address the following research questions:

1. Does built cultural heritage has a positive regional development impact as a result of the special value created by building conservation projects?
2. Does “trading zone” as an active decision-making sphere can be compatible with the rise of the economic and political worries in Europe?
3. How can collective decision-making process be enhanced into to present economic and political environment for knowledgeable and collective “deciding and acting”?

Trading Zone

Conservation project involved in sustainable development can be compared with a trading zone, where different actors present their values and goods to achieve the established goal.

The basis of the metaphor “trading zone” is anthropological studies about how different cultures are capable of exchanging goods, despite differences in their language and cultural system. The decision to conserve a historic building is a complex process based on cultural, historical and political aspects. It may be described as a successfully concluded articulation of meanings and values. The trading zone is a lively commercial, scholarly scientific and political marketplace where various traditions, methods and languages related to the actual stakeholders involved have to be understood and combined. When a trading zone exchange occurs, a common language of communication is developed across the borders between different disciplines and practices (Gustafsson, 2009).

The trading zone may be regarded as having an intermediate position between a theory-conceptual level and daily practice. In the trading zone, values of different policies were translated to be understood as resources for different actors. The various values were expressed in different units. To understand the trading zone in this context, several theories handling various structures and systems are needed, e.g. judgement within appreciative systems, policy-making and receptive contexts, theories of values, conservation principles, resource-based economy studies, collaboration theories and action research. The facts are understood as regulations as well as the outcome from the conservation projects, and not least, that all of it actually was realized, manifested and not just an arbitrary estimating model.

Ronald Beiner (1983) made an important contribution to understanding how to deal with human affairs and judge the common world when he examined the discourses of Aristotle and Kant, as well as the works of Arendt, Gadamer and Habermas. Beiner combines the transcendental perspective of Kant, by which to promote an account of formal constitutive features of politics as such, with the substantive features of political life of Aristotle, by which to fill the content of a formal delineation.

“Here, attention is called to the contemplative, disinterested dimension of Kantian judgement in contrast to the active, praxis-oriented dimension of Aristotelian judgement. Judging, according to Beiner’s interpretation of Kant, is the activity of subsuming particulars or finding the correct concept with which to apprehend a given instance. Judgement is here determinant, where the rule, the principle or the law is given in advance for the assumption, and at the same time reflective where the rule, the principle or the law is lacking and somehow has to be produced from particulars. Thus, judgement can be defined as the activity of subsuming particulars under universals” (Beiner, 1983).



Fig. 1 – The trading zone might be regarded as the hub for negotiations and judgements in a field between policies and resources, and between values and facts.

Building conservation and workforce development

In the long run the cultural, social, aesthetic, historical and educational values of building conservation are more important than the economic value. The economic contributions of cultural heritage conservation need to be among the factors a community considers when thinking its future. But a community without memory is a meaningless place. Historic resources are the physical manifestation of memory. Cultural, social, aesthetic, historical and educational values are building blocks of quality of life. Historic preservation is not about cities being the museums of the past; historic preservation is about using heritage resources to build quality of life for future.

Donovan D. Rypkema (2010) states that heritage conservation has multiple values: cultural, aesthetic, educational, environmental, social, historical, and others. A more recent addition to this litany of values is the economic value of heritage conservation.

“For years, this contributing component of value was considered too crass and too demeaning to the underlying importance of the historic resources to merit serious discussion. Even today there are heritage conservation purists who dismiss the measurement and advocacy for historic preservation on economic grounds as degrading and insulting to the metaphysical, immeasurable qualities and importance of humankind’s built patrimony” (Rypkema, 2010).

Cultural heritage has multiple benefits of Europe today and any of those benefits are economic. Studies over the last decade have identified the major measurable of the economic impacts of heritage conservation including jobs creation and household income.

For most professionals in the economic development field, the top priorities are creating jobs and increasing local household income. The rehabilitation of historic buildings is particularly potent in this regard. The costs of new construction in the US and Europe will be half materials and half labour. The costs of rehabilitation will be 60 to 70% labour with the balance being materials. This labour intensity affects a local economy on multipliers levels.

The Swedish International Development Agency has funded projects in the West Bank in Palestine where they’ve found that every \$100,000 project typically provides 3,000 to 3,500 workdays, with labour constituting around 70% of the total expenditures. In Australia, they’ve concluded that heritage conservation is more labour intensive and also stimulates the development of traditional trades and skills (Amiry, 2005).

Based on data from Regional Multipliers: utilizing Regional Input-Output Modelling System (RIMS II), Donovan Rypkema calculated the impacts of historic conservation on job creation. He states that a million dollars

spent on new construction generates 36.1 jobs, however, a million dollars rehabilitating an historic building generates 40 jobs.

A million dollars of manufacturing output adds \$604,000 to local household incomes. A million dollars in new construction adds \$764,000, however a million dollars of rehabilitation adds over \$826,000 (Rypkema, 2010). In Europe, historic rehabilitation creates 16.5% more jobs than new construction, and every direct job in the cultural heritage sector creates 26.7 indirect jobs. Compare this to the auto industry, where the factor is only 6.3 to 1 (Nypan, 2003).

But there is an even subtler issue regarding jobs in heritage conservation – they are generally well-paying jobs, and globally there is a scarcity of the required skills. A 2010 study in Great Britain identified the need for an additional 6,500 workers in the next twelve months to meet immediate demand (National Heritage Training Group, 2005).

The Norway Directorate of Heritage identified a huge backlog of necessary maintenance work and too few trained people to do it. The restoration and revitalization of the old city neighbourhood of Darb al-Ahmar in Cairo provided significant employment and job training; at its peak, it employed 400 workers daily (Aga Khan Trust for Culture, 2005).

The significance and the opportunities for restoration artisans cannot be overstated. In England an estimated 86,000 people are employed to preserve nearly 4.5 million historic houses and another 550,000 historic commercial buildings. In France, there are more than 40,000 craftsmen working on repairs and maintenance of cultural heritage. The Aga Khan Trust is funding projects in the Islamic world that are reviving traditional skills, generating new jobs, and providing on-the-job training.

In Halmstad, Sweden, restoration work within the Halland Model has put long-term unemployed back to work and provided training for immigrants, apprentices, and women (UN-Habitat, 2005). It is clear that heritage conservation is the most economically impacting in public and private works projects and ultimately heritage conservation generates economic development and provides good jobs.

The Halland Model was a project directed towards building conservation and labour market development. Unemployed construction workers were trained and skilled by the traditional buildings techniques before and within their practices of their conservation works. The objectives of the project were: save the jobs, save the craftsmanship, save the historical buildings, and achieving regional sustainable development.

Heritage conservation and sustainable development

The models for economic development and conservation management planning can be integrated to evolve a new model wherein heritage serves as the core of development process. The process moves through five phases – awareness, appreciation and engagement of stakeholders; trading zone, negotiations and agreement; sustainable and smart planning; conservation and protection; and utilization. The awareness and engagement phase can be established through a socio-cultural and socio-economic mapping activity of the community.

The trading zone and negotiation phase can be implemented through community organizing which engenders community solidarity and through capacity building which installs technical and decision-making empowerment. The conservation and protection phase can be realized with a heritage charter, legislation or guidelines and financing. And the utilization phase can be conducted through educational programming to produce education value or project feasibility study to produce economic value (fig. 2).

Heritage conservation and sustainable development framework

The Heritage and Sustainable Development framework is the foundation that begins the process from heritage awareness and stakeholders' engagement moving to consensus on heritage appreciation and then to heritage protection and finally to heritage utilization. This movement transforms the user from basic affection to multidimensional actions. To ensure the sustainability of heritage conservation and development, stakeholders and users must go through each of the steps of the process in flatter decision

making way within the trading zone. Many heritage and development programs dwell on one phase and never move to the next or without having a consensus within the trading zone.

The heritage and development framework requires five phases. Each phase has set activities. Heritage awareness and stakeholders' engagement is established through the cultural mapping goals and objectives, broken down into investigations' establishing the significance of a heritage resource in terms of cost-benefits analysis and win-win game. Trading zone and negotiations is generated through stakeholders' discussions, community participation and professionals' capacity-building, equipping the community with values and skills to conserve a heritage resource which leads to positive consensus on heritage appreciation. Heritage conservation and protection is policy making, realized through setting of guidelines, development of a charter to secure and protect heritage, its significance and its contemporary use as it addresses a need of the community. Heritage utilization is effected through project feasibility studies that would contextualize heritage and its significance and transform it into revenue or value added generating endeavours.

This heritage conservation and sustainable development framework is designed and deduced based on the Halland Model which was operationalized in a reference tool and framework for policies decision makers.

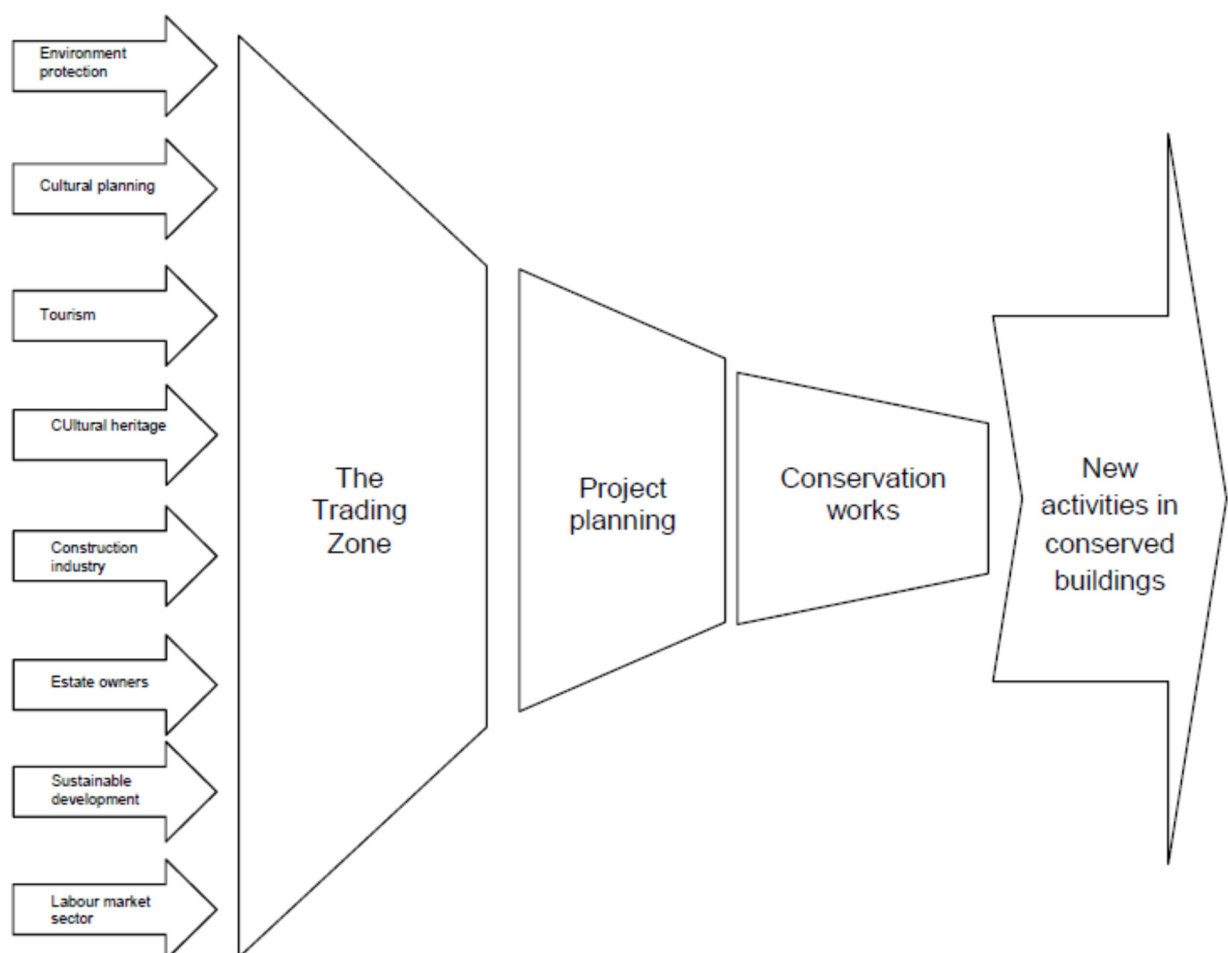


Fig. 2 – Sustainable conservation management planning as integrated model wherein heritage serves as the core of development process.

The figure shows the process of regional development programs based on the trading zone principles. The process starts with planning procedures within each sector/industry. In the trading zone, negotiations about different policies, values, facts, resources and activities result in the selection of conservation projects. Consequently, feasibility studies are realized, which provide the foundation for project planning, including

surveys of quality and quantity, etc. After the finished conservation work, new activities were made available to take place in the improved premises.

Swot Analysis of the Halland Model

SWOT analysis: an introduction

SWOT analysis is a method, used in strategic planning, originating from management fields, but widely used in other fields of strategic planning, including historic conservation. It is used to assess the development potentials and general circumstances, context for the development. The results of the SWOT analysis are basis to formulate strategies and are used in the beginning phase of strategy formulation or models development, where key directions of the strategy are selected. SWOT analysis is therefore very basic and generalized method in historic conservation planning and development.

In this study, the researchers utilize SWOT analysis as an option to study the Halland Model which is already been defined and implemented. A SWOT analysis is then used to define the strategy of evaluation for a development project, which concretizes general objectives of historic conservation. SWOT analysis is qualitative and subjective in its nature, no exact methods are used during executing swot analysis and its results are not hard data. Main objective of a SWOT analysis in this study is to position cultural heritage and historic conservation into its environs and wider development circumstances.

Structure

There are two variants of the structure of the SWOT analysis possible. According to both structures the development factors are divided to positive and negative factors, i.e. factors that are favourable and factors that are averse to the building conservation outcomes. First variant of the structure then divides the factors according to their origin: internal factors stem from inside the Halland model projects area, external factors stem from outside the projects area. To make distinction between external and internal factors it is very important to define an object of strategy and therefore object of the SWOT analysis. In this study, the Halland model is an object of the SWOT analysis, thus all the factors, stemming from inside the historic conservation projects implemented as part of the Halland project, are internal and all the factors, stemming from the historic conservation projects, but from outside of the project area, are external. The second variant of a structure divides the development factors according to the time dimension: actual and foreseen. Within the Halland project, the dimensional variables were the era of machine-based economy and the foreseen temporal dimension is the era of knowledge based economy.

Internal factors can be in certain degree directly influenced (developed, reduced) by the actors that conduct SWOT analysis. External factors are trends, circumstances and events, over which actors have no or negligible influence (situation of a national or global economy, national policies, legal system etc.). External factors can be observed, predicted and be taken into account at conceiving of strategies. Often it is difficult to differentiate between internal and external factors. Direction of a factor is also case dependent: one factor with the same. Characteristics can be positive in certain circumstances or negative in other circumstances.

Procedure

SWOT analysis for Halland model was carried on in interviews and focus groups of participants presented, exchanged and developed ideas on development factors regarding the Halland model conservation projects. The interviews and focus groups were consisting of experts, workers, policy makers, buildings owners, developers, conservationists and community representatives. The team was interdisciplinary and cross-sectoral. The Halland Model SWOT analysis is a participative SWOT and it considers a useful tool at conducting the participation process.

Swot analysis of historic conservation projects

SWOT analysis is one of the most widespread methods of strategic and development planning in regional and urban development. It allows early estimation and systematization of development factors. It can be used as a tool in participative process; moreover, it encourages discussion among experts. It is fast to execute and cost efficient and therefore suitable for specific projects.

Swot variables of sustainable historic conservation

In the previous era, historic conservation projects used to follow ad-hoc and disjointed approaches in the main aim of historical conservation was to improve sanitation and water supply, reduce overcrowding, or otherwise improve the living conditions in older housing areas and such improvements do provide the least satisfactory environment. However, a better environment also implies a satisfying of social, economic and cultural life for those who make use of the space.

The Halland model focuses on building conservation, revitalization and rehabilitation of historic as a holistic-comprehensive sustainable approach and not only individual buildings. The model advocates policies that emphasize the importance of a comprehensive and integrated approach to planning for historic fabric, and especially the need to consider complete conservation/rehabilitation areas, not just individual buildings. The Halland model approach raises a variety of crucial issues and questions as follows:

Political aspects

- How can political support be generated and maintained?
- How can national and municipal policies in support of historic conservation of urban be established?
- How can the affected population and different stakeholders participate in the formulation and execution of conservation plans and schemes?

Cultural aspects

- To what extent can building conservation contribute to the strengthening of indigenous cultural traditions and forms?
- What is the role of historic buildings or areas, their physical characteristics and their social life in the local (or national) culture?
- Can historic buildings become an area of special tourist interest?

Social aspects

- How can local community participate effectively in the building conservation process?
- Does building conservation generate regional workforce development?
- How can low-skilled or unemployed construction workers be part of the economic development strategies?

Economic aspects

- How can building conservation be financed?
- What mix of private and public resources, i.e. public-private partnerships, should be utilized?
- How can older property use and spaces compete with new ones?
- How can the contribution of the historic areas of the region economy be consolidated?
- Which economic role could heritage tourism play in this context?

The following broad SWOT analysis considers some of the strengths, weaknesses, opportunities and threats in the Halland building conservation model and projects. The issues highlighted at the stakeholders' who were identified broad issues related to the above mentioned variables which mostly overlap with sustainable historic conservation themes.

Strengths (S)
Presence of historic buildings stocks spread throughout Sweden and Europe with interesting significance.
Proactive institutional and policy framework, the number of stakeholders and sectoral strategies has increased in recent years.
The project succeeded to save jobs in the regional construction market and managed to adjust the unemployed construction workers and absorbed them in heritage conservation market.
The project succeeded to develop and to revitalize the craftsmanship.
The project succeeded to protect and to save historical buildings and the rich history.
Initiated holistic-comprehensive approach instead of incremental-disjointed approach.
Shifted the paradigm of historic conservation from single-objective to broad sustainable vision.
Developed the process of negotiation on building conservation, bargaining, and decision making (trading zone).
Urban and regional development catalyst and increasing cultural activities.
Raising public awareness, attract the interest of private sector, buildings owners, and local authorities' interests.
Generate sustainable economic development (economy holding its own).
Protecting cultural identity and strengthening the sense of pride to the local community.
Trading zone elevates the cooperation team work to raise fund.
Education outcomes were generated from the Halland model.
The project served as start-up proactive foundation for the current smart-specialisation strategies in sustainable historic conservation.
Locally available specialist contractors used to work on historic buildings.
Good mix-use medium and small commercial premises.

Weakness (W)
Lack of interest from other Swedish regions to implement the Halland Model.
In the trading zone, it is difficult to know who supposed to be in charge.
Stakeholders from out of heritage fields are still not enthusiastic to building conservation specially, where historic buildings located in land parcels with high value and price.
Heritage tourism cannot compete in every place.
The heritage offer is undervalued and many local authorities look at heritage not always as a potential asset.
Local Authorities and private sectors is limited primarily to support or to promote historic conservation.
Community fragmented through change, lack of sense of belonging.
Out of town retail vs. retail in old core for commercial historic buildings.
Fragmented stakeholders with different interests.
Lack of public strategies and policies aiming at adapting historic conserved areas to be an inclusive hubs and innovative cluster augmented by creative class and agglomerated heritage industry.
The Swedish labour policies and the national employment board laws and regulations.

Opportunities (O)
Swedish cultural heritage capital can play as driver of regional development and sustainable growth.
The Halland Model serves as an instrument to educate policy makers that saving historic buildings has development effects and multipliers.
Integrating cultural heritage in workforce development and labour market policies and plans.
The Halland Model can be applied in other EU countries as a tool to absorb the unemployed skilled-refugees.
Benefits from private sector and national funds and the private sector represent a resource that can be used to

improve management of heritage.
Stakeholder's integration in policy and decision-making process and their interrelationships can leverage to improve heritage conservation and management.
The model serves as catalyst for cultural agglomerations, clusters, and innovative industry.
The special and unique brands of the variety of cultural heritage leads to a unique competitive advantage.
An opportunity to initiate the national institute for vocational education and training in the field of crafts and historic conservation.
The Model offers an opportunity for entrepreneurial businesses in heritage industry.
EU and national resources are available to help streamline the sector of historic conservation by amending legislation and developing research and institutional capacity.
Heritage has the potential to be positioned as a prime economic driver of heritage tourism.
EU universities are a good resource for creating new capacity of heritage conservation and management through the introduction of educational programs.
Local communities are available to assist and support heritage conservation.
Heritage conservation knowledge and Halland model transfer can be enhanced and applied through twining programs among Swedish cities, EU cities, and other cities in the developing countries.
Media, national workshops, and seminars can be used to help educate society on the significance of heritage significance and heritage conservation field.
The Halland Model shifted the conservationist's notion on historic buildings from values significance to the notion of heritage as community economic and sustainable assets.
The Halland Model reformulated definition historic conservation from its tradition goals and technical level to the level political process and decision-making hierarchy (economic crisis and refugees).
The Halland Model functions as building trust instrument among stakeholders.
The model is visionary roadmap for regional development through historic conservation; however, it follows the flexible action plans.

Threats (T)
Different political policies and strategies in the EU region with different views towards cultural heritage
Shifted economy from machine-based economy to knowledge-based economy
Cultural heritage to continue representing less interest in the EU governments priorities.
Taxes exemptions and historic designation to continue monopolized by local municipalities
Fluctuations in the economy and labour market that changes policies and strategies.
Political decisions and governments agenda which influences national and local authority's plans and priorities (weakness of political motivation to support heritage conservation and use)
Political system and hierarchy of budgeting which is more centralized and there is no room of flexibility to be done on local and municipal level.
Multi-sectoral policies and strategies fail to adequately diversity the historic conservation offer and make it more recognizable, from which negative context effects on investment.
Insufficient connection with national development strategies and lack of strategy in resource allocation for development of historic conservation by local authorities.
Absence of intermediate level of government, responsible for historic conservation and decentralized regional/provincial historic conservation and management offices in charge of historic conservation funding and promotion, could hinder the ability to coordinate inter-municipal initiatives.
Loss of heritage assets due to lack of adequate planning, funding, and conservation incentives.
Large scale development (urban sprawl and new buildings)
Difficult with all cities' major industries those using heritage buildings in decline.

Lack of consistency among heritage specialists on historic conservation's interpretation and appeal.
Continuous lack of appreciation of full diversity and complexity of spatial qualities, historic fabric, and sustainable values of historic conservation.

Shifting collective decision-making sphere to collective-collaborative governance model

A conflict among different stakeholders on the preservation of historic urban fabric, place, and site from one side and development changes on the preserved character has formed the central discussion for conservation in meaning and practices. The conflict has expanded from the dispute on heritage and conservation values to become an argument about decision making, management, and planning of historic place or area. This article evaluates the Halland Model and the trading zone notion in terms of studying the current conflict among the stakeholders and argues for a sustainable governance approach to manage and planning of heritage decision-making process based on communicative, collaborative and cooperative actions together within the Halland and Trading Zones models.

To those who are seeking practical solutions to building conservations problems, The Halland Model and the Trading Zone may offer the theoretical answer. However, there are operational procedures which might be invited. Developing skills in translation, in constructive approach, in collective and understanding actions to be able to realize the potential of strategies understood as cooperative-collective discussion, addressing, and working out and to prepare the stakeholders to act in respect of common concerns about the sustainable development role of historic conservation in a certain region.

Development of The Halland Model needs to change the mind-sets and practices evolved within the trading zone arena to identify the stakeholders' potential within a new communicative, dialogue-based, and cooperative governance system. Long life skills are so needed in order to take into the collective thinking in respect to the historic conservation's public concerns in a creative process. In this contemporary knowledge-based economy and the rise of different multidisciplinary-dynamics societies, conservatives and the opposition of "development" in its way to collapse, and through developing a cooperative, communicative, and collaborative governance process of The Halland Model or Trading Zone notion can develop as a future-progressive force not only to make sense together, but also to govern together.

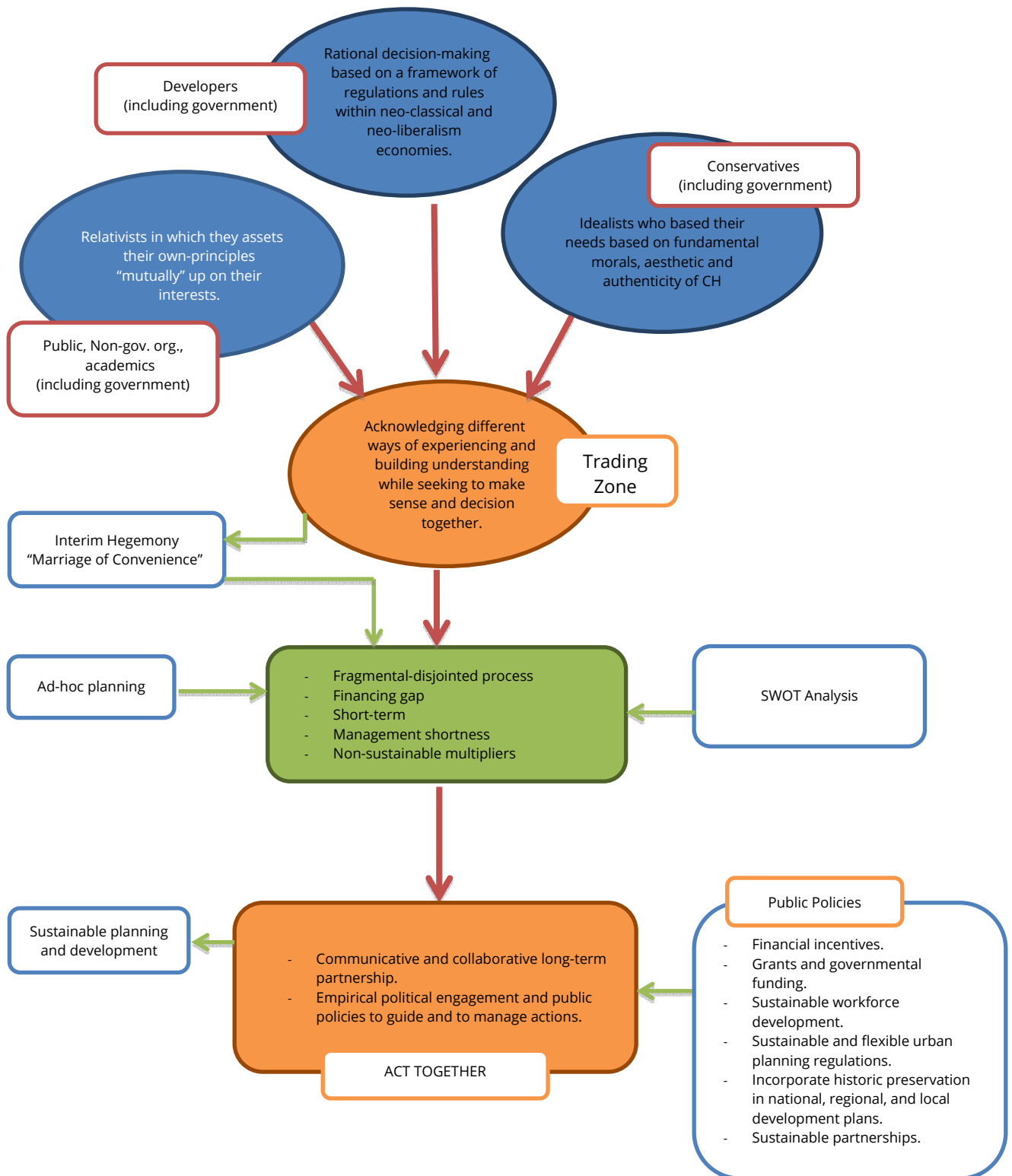


Fig. 2 – Roadmap and theoretical framework for Halland Models' enhancement.

Collaborative, communicative, and cooperative governance process of The Halland Model or Trading Zone notion have emerged as a response to the failure of decision-making process and the lack of consensus on the importance role of heritage conservation among the engaged parties as well as due to high cost of politicization of rules and regulations. The model argues that the focus is on decision-making in the cooperative, communicative, and collaborative manner where groups of specialists, organizations, systems

of public institutions, private sector, and common making decisions. The actors work collectively in distinctive ways, using particular processes, skills, and capacity for the provision of public goods.

Despite the Halland Model and trading zone notion propose collaborative forums aiming at reaching a consensus-oriented decision making and the models focusing on public policies and issues, the models managed to drive the actors to engage in “positive-sum bargaining” and succeeded to encourage them to develop cooperative short-term alliances. Thus, the result of both models lead to ad hoc communication and cooperation and they failed to transfer conflicts into long-run cooperative governance.

In this study, our main intention to utilize the SWOT analysis of The Halland Model in order to treat the weak points and obstacles to understand how we can enhance the governance part of the model. Although scholars in policies and strategies who are studying governance systems had already made very important theoretical notions, however, no one studied or standardized a governance theoretical collaborative, cooperative, and communicative approach of heritage sustainable development.

We studied the impacts of the Halland model over the past 25 years and we used the SWOT analysis to develop the Halland model not only as a sound idea but how to fill the gap of good governance cooperative and collaborative act together. The model enhancements are derived by the earlier experience and the evaluation of the model outcomes. We studied and tried to understand the conditions under which the stakeholders and actors cooperate within the trading zone. How they achieve consensus and agreement? Which process and in which negotiations’ atmosphere? By finding answers for our interview questions, we discovered that trading zone interested and satisfied with the outcomes rather than policy and process outcomes.

Figure 3 provides a visual representation of our central enhancement steps. The model has three broad improvement components-developing capabilities and capacity; planning, building vision and strategy; and win-win policy making. Each of these broad components can be disjointed into more detailed components and tasks. Trading zone and The Halland Model have treated as the core of the enhanced governance model, while these three components represented as major contributions for the innovative-collaborative process. The following describes the three components in more detail which form the innovative-collaborative process of The Halland Model.

Developing capabilities and capacity

This part of the model enhancement aims at facilitating and encouraging the cooperation among stakeholders. Breaking the division and removing the pre-history conflict helps the stakeholders to have a shared vision for what they would like to accomplish through collaboration on mutual respect basis. The ambition of this phase is to create power balance between stakeholders within the trading zone hub. The balance among stakeholders can be created through building the capacity of the fragile partners to have an equal footing with other stakeholders. The process aims at constructing a process by strong actors.

Additionally, leadership considers as a critical component in bringing parties together and to lead a cooperative-collaborative spirit and process. Successful mediator leads to constructive negotiations. Leadership can set and maintain clear ground rules, building trust, facilitating dialogue, and exploring mutual understanding. Lasker and Weiss (2001) argue that collaborative leaders must be skilled in terms of promoting an active participation, ensure sustainable and control over the dialogue, and facilitate productive group dynamics.

Institutional or organisational building refers to building the capacity of those fragile stakeholders. Empowering weaker representatives helps to bring a balance of power among stakeholders and gives meaningful and positive participation. Institutional building also refers to formulate accurate and constructive protocols, ground rules for cooperative and collaborative process. Trading zone must be inclusive for all potential partners and this leads to a process where policy outcomes and decisions represents a broad-based consensus. Non-inclusive representation threatens to undermine the legitimacy of policy outcomes and doubts the decisions taken by the trading zone forum.

On the other hand, trust building among the stakeholders is important aspect of the early collaborative and cooperative process. Dialogue and negotiation, and bargaining can be quite difficult to encourage and to cultivate without building understanding and trust among the stakeholders. Trust is the core of the process of breaking down stereotypes and other barriers and it helps to build mutual respect and creates a commitment to the process.

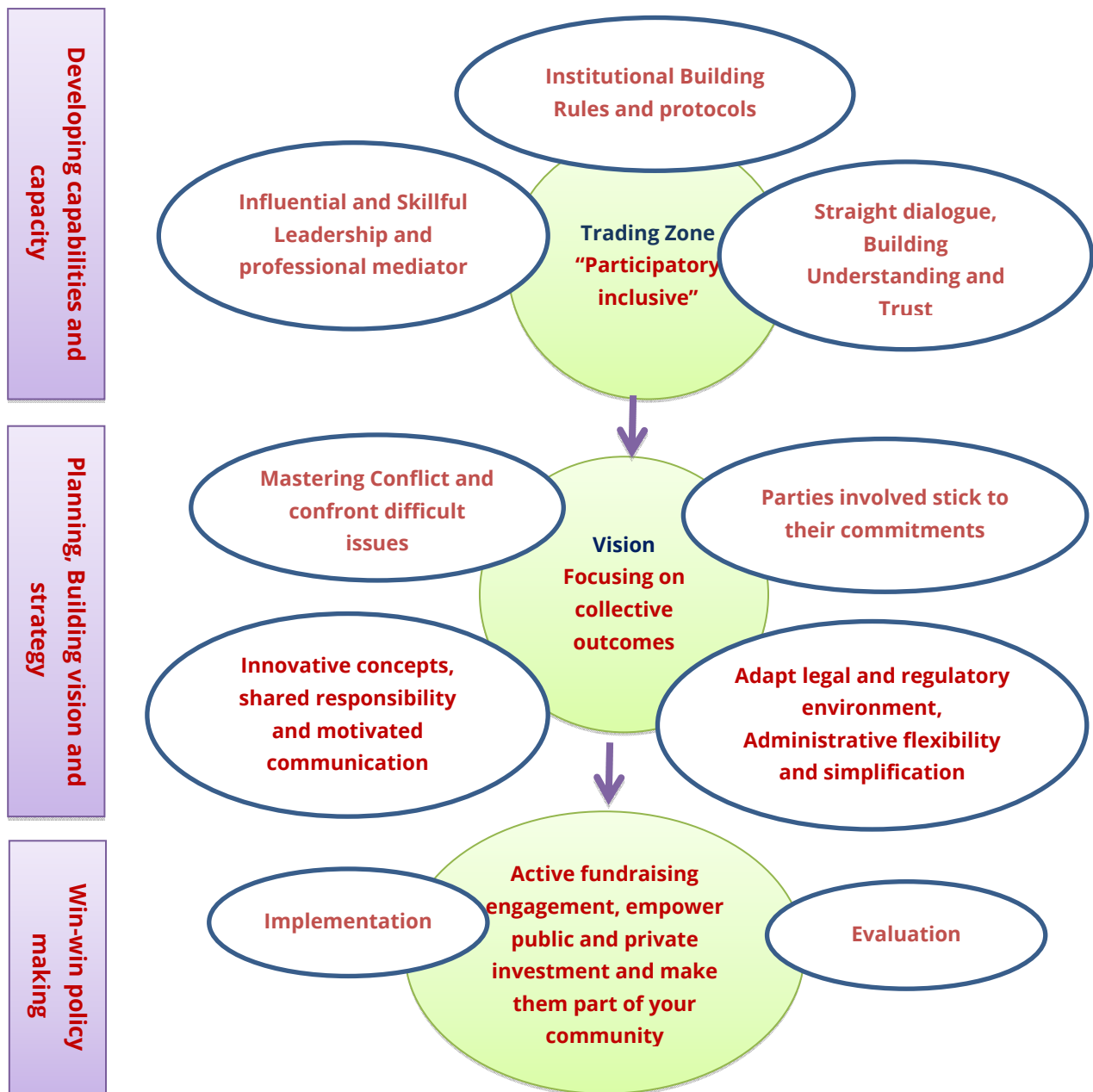


Fig. 3 illustrates enhancement process and policy outcomes (Innovative-Collaborative Governance).

Planning, building vision and strategy

It is difficult to achieve constructive planning and building shared vision with conflict among partners. Conflict needs to find a solution that satisfies stakeholders and this leads to deal successfully with the conflict. In this collaborative and cooperative model, it proposes to handle the conflict through avoidance of or position-based competition. In this approach, stakeholders in conflict do not deal with their differences and they hold to their positions and try to prevail their power over the other fragile one. The problem of this competitive approach is that one stakeholder win and the other lose. As a result, relationships be weakened

and commitments to consensus in decision making may be weak. Thus, this model proposes interest-based problem solving approach. This approach means that there is a margin for stakeholders who have conflict to sit down together and to find a solution by dialogue about their mutual concerns and interest. The stakeholders feel more likely that the decision-making process has been a fair one and they tend to be more committed to carrying out the agreements made.

Commitment relies on trust and respect for stakeholders' different perspectives and interests. Commitments form clear, transparent, and fair procedures in the right decision-making process. Additionally, commitment creates mutual confidence among stakeholders that the procedures have integrity and fairness.

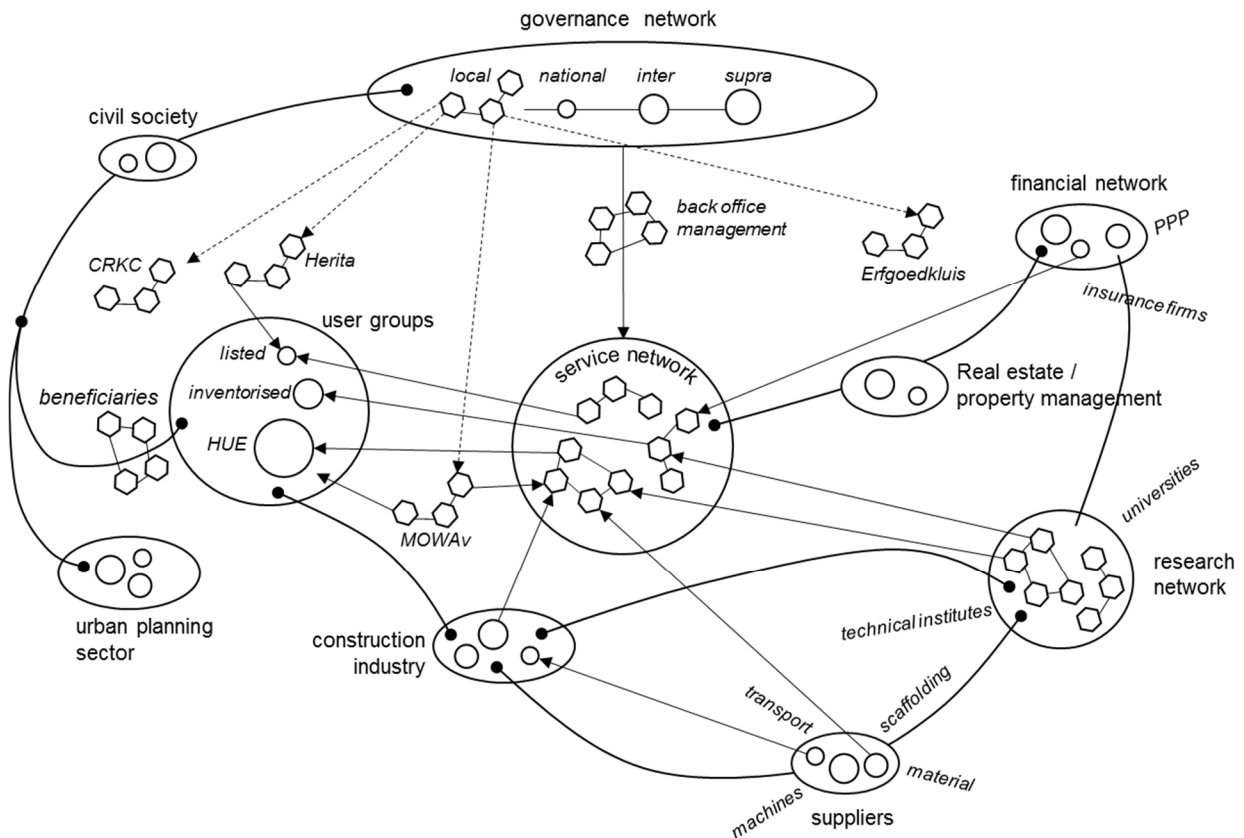
The researchers suggest that good planning and cooperative and innovative vision and strategy are more likely to ensure when the possible purposes and advantages of collaboration are relatively concrete and when win-win approach gained from collaborative-collective decision making.

Win-win policy making

Successful and productive outcomes of the collaborative process may represent tangible outputs and practical evidence for the stakeholders and it keeps up the progress and the momentum that leads to sustainable and durable cooperation. Win-win outcomes allows all the stakeholders to gain from their decision-making and encouraging them towards continuing working together towards finding solutions to their barriers that result in bringing satisfaction for partners. The win-win atmosphere maintains the relationship among different partners and encouraging them to focus on interests not positions, rights, or stereotypes. This approach equips different partners and helps them to generate a variety of options and solutions based on an objective and interest-based standards which offer gains to the stakeholders.

MONUMENTENWACHT VLAANDEREN

The focus of the KU Leuven team is on the conservation practices of Monumentenwacht Vlaanderen. Herewith it should be stressed that the scope of this organisation, as well as the research was on the implementation of maintenance interventions rather than large scale restoration and conservation projects.



A schematic overview of the multi-actor network of the built heritage sector in the Flemish region.
(Scheme concept based on Geels, F. 2002. Technological transitions as evolutionary reconfiguration processes: a multi-level perspective and a case-study, Research Policy 31: 1257–1274).

ACTORS	GOALS	POLICIES / INCENTIVES	ACTIONS	RESOURCES
Flemish Heritage Agency	To uphold the general state of conservation of the protected and inventorised built heritage To valorise and create awareness for the historic building stock.	Law and policy framework to define maintenance responsibilities and provide financial premiums and practical advice.	Legal protection (of immovable heritage; movable and intangible heritage is the responsibility of another agency and another minister in the Flemish Government); Maintenance premiums; authorization of conservation interventions (often including maintenance); authorization of maintenance plans; enforcement of heritage law; brochures and information for owner-managers.	Legal: prepares laws/decrees for responsible minister; Financial: Flemish Region Human capital: Employees dispose of knowledge heritage preservation principles and policy + external advice and knowledge through networking
Monumentenwacht	2 principal assignments: on the long term the organisation is to realise a change in mentality through information and sensitisation of local owners-managers and on the short term arrest decay of historic structures by enabling minimum intervention through periodic monitoring	supporting private and public built heritage owner-managers in the preservation of their properties through regular inspections and fostering awareness on the importance of maintenance; service is provided at cost which is lower than the cost of the service (thanks to financial support of Provincial administration and Flemish Government; see: resources)	Visual inspections and condition reports; carrying out small interventions on site during inspections to avoid consequential damages; “example interventions” for owners-managers; “aftercare” includes an explanation and interpretation of the inspection report or attending (site) meetings; maintenance brochures; general awareness activities for the large public on maintenance and monitoring.	Financial: Flemish Region, Provincial authorities, membership fees Human capital: the monumentenwachters dispose of knowledge on the quality and durability of materials, construction techniques, maintenance requirements and the results of incompatible interventions + external advice and knowledge through networking
Owner-managers: Private	Maintain functional performance of property; in some cases avoid additional costs due to deferred maintenance; in some cases preserve the heritage values of their property	Responsible for the good maintenance of the protected historic building (zorgplicht) Balance between cost, functionality, appreciation, personal bond to the property and maintenance quality expectations	A variety of the following actions are applied by owner-managers: maintenance interventions and plans, membership of Monumentenwacht, regular inspections by Monumentenwachters or contractors, yearly maintenance	Financial: private resources; maintenance premiums by Flemish Region and in some cases provincial or even municipal authorities; beneficiaries Human capital: do-it-yourself, prior knowledge of house defects

		Incentive: (in some cases) get profit from the use of a heritage building in good state of preservation.	actions (e.g. cleaning gutters), applying for maintenance premiums; sometimes curative actions (restoration) are needed.	+ external advice and knowledge through networking; sometimes financial support for curative actions. Sometimes: revenues
Owner-managers: Public municipalities <i>(Please note: public municipalities have specific duties – outlined under POLICIES – as local governments towards built heritage located within their competent area. In addition, they can be owners of built heritage properties. The ACTIONS outline how they deal with these properties.)</i>	Maintain functional performance of property; in some cases, avoid additional costs due to deferred maintenance; in some cases, preserve the heritage values of their property	'Zorgplicht' obliges administrative authorities to take into account heritage characteristics of inventories properties during their activities; 'motiveringsplicht' ensures that the administrative authorities clarify to what extent and how the heritage values were dealt with; 'informatieplicht' was installed in context of inventories property transfer; Incentive: get profit and/or visibility	The 308 Flemish municipalities have a joint debt of 10.14 billion euro. To remedy their respective debts, several municipalities opt within their 'beleids- en beheerscyclus' to sell the built heritage properties which are no longer useful for their local services. The current budgetary constraints cause built heritage investments to be postponed and certain commitments to be halted. On the other hand, the different maintenance partnerships and teams on provincial and municipal level initiated throughout the 2000s continue to exist; local authorities can organize themselves as (local) heritage communes, develop local policies	Financial: Flemish Region and in some cases European funds Human capital: some larger municipalities have a own heritage service with employees who dispose of knowledge on local specificities and building technology + external advice and knowledge through networking
Owner-managers: Church fabric	Maintain functional performance of property; in some cases avoid additional costs due to deferred maintenance; in some cases preserve the heritage values of their property	Churches are obliged to provide a 6-year maintenance plan with budgeting to the local authorities; Volunteers strive for a balance between cost, functionality (depending on number of churchgoers), appreciation, personal and religious bond to the property and maintenance quality expectations	Most of the following actions are applied by church fabrics: maintenance interventions and plans, membership of Monumentenwacht, regular inspections by Monumentenwachters or contractors, yearly maintenance actions (e.g. cleaning gutters), applying for maintenance	Financial: Flemish Region and local authorities and beneficiaries Human capital: + external advise and knowledge through networking

			premiums	
Contractors	Maintain a stable enterprise; productivity growth	Few companies are specialised in maintenance of historic buildings; current market organisation is not focussed on maintenance	Maintenance interventions upon demand of owner-managers	Financial: Company resources Human capital: employees with expertise and knowledge on historic materials and techniques – there is a growing lack of skilled craftsman in the sector + external advice and knowledge through networking
Architects	Maintain a stable enterprise; productivity growth	Few architects and offices are specialised in maintenance of historic buildings; current market organisation is not focussed on maintenance	Draft maintenance plans, almost never involved in maintenance interventions	Reports and sensitisation activities of Monumentenwacht; Financial: Company resources Human capital: employees with expertise and knowledge on historic materials and techniques + external advice and knowledge through networking
Civil society	Heritage valorisation, policy pressure initiatives, awareness raising actions	Heritage value preservation	Open Monuments day, newsletters and social media, objections in a case dealing with demolition and spatial planning	Monumentenwacht (sensitisation) activities Financial: Flemish Region crow-funding, European funds, membership fees, beneficiaries Human capital: employees and volunteers with people and social skills + external advice and knowledge through networking
Research network	Generate and enhance knowledge; develop expertise; international cooperation	Knowledge for societal benefit, preservation of heritage, academic results	Setting up (international) research projects, applying for grants, conducting fundamental and applied research, disseminating and valorising knowledge, study days, consultancy	Financial: European, National, Regional funds, beneficiaries of the heritage sector (e.g. contractors, banks, ...) Human capital: researchers + external advice and knowledge through networking

Question 5 and 7

Strengths	Weaknesses
<p>Conservation Quality: long-term beneficial effect on physical authenticity and integrity of historic structures; early warning system for long-term damage accumulations; awareness of evolution on the state of conservation of the building.</p> <p>Enhancement of Capacity / Skills: 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.</p> <p>People / Community involvement: 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.</p> <p>Impact on the market: potential to set-up agglomeration economies by pointing out the actual maintenance demand; Meerjarenonderhoudsplanung met kostenraming (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.</p> <p>Impact on decision making: large scale data on the maintenance needs entail a valuable decision-making source.</p>	<p>Conservation Quality: inspections and assessments are solely based on visual inspections instead of in-depth diagnosis; sometimes long period in between inspections due lack of staff.</p> <p>Enhancement of Capacity / Skills: difficult to find good monumentenwachters because they have to operate within a very specific mental framework that supports sometimes challenging communication with laypersons and entails feasible minimum strategies over 'ideal' standards and a superficial acquaintance with thousands of structures over an in-depth relation with one single structure.</p> <p>People / Community involvement: Inspection reports are not always implemented due to lack of awareness or financial constraints.</p> <p>Impact on the market: there is a need for a maintenance focussed market and organisational forms.</p> <p>Impact on decision making: the scope of impact on decision making is limited to providing valuable decision-making information.</p>
Opportunities	Threats
<p>Conservation Quality: Integrate more in-depth diagnosis, keep record of maintenance interventions (technical information).</p> <p>Enhancement of Capacity / Skills: Incentives and opportunities for training people to become monumentenwachters.</p> <p>People / Community involvement: Incentives for actions and more awareness raising on maintenance benefits.</p> <p>Impact on the market: keep record of maintenance interventions (economic information), incentives to create a maintenance market (e.g. organisation formats, financial incentives, new forms of service platforms and contracts).</p> <p>Impact on decision making: more in-depth data for decision making, prove that socio-economic viability of maintenance to create a larger impact in the sector.</p>	<p>Conservation Quality: The quality of the inspection report depends on the expertise of the monumentenwachters, Loss of knowledge on materials and techniques can lead to deficient inspection reports.</p> <p>Enhancement of Capacity / Skills: The lack of qualitative training opportunities can lead to a lack of monumentenwachters.</p> <p>People / Community involvement: increased awareness could lead to a practice solely based on do-it-yourself, which could affect the conservation quality.</p> <p>Impact on the market: in case of more in-depth diagnosis, MOWAv will become a direct competition of more established actors in the sector.</p> <p>Impact on decision making: The existence of the MOWAv model is depended on public resources and therefore depended on the interest and values attributed by decision makers.</p> <p>Lack of integrated maintenance policies based chain awareness that understand the role and contribution of all necessary "players" and that favours proper linking between them to come to an effective implementation. "Today Monumentenwacht as a good monitoring "partner" is a too isolated link in a not existing chain".</p>

The MOWAv model demonstrates that the additional operational costs for implementing a regular inspection approach can become an efficient resource expenditure if the inspections target the heritage building stock, rather than individual historic structures (example of system approach of preventive systems). To operationalise this larger scale MOWAv 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, but 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.

The available monitoring data indicate the efficiency of this approach in site management and its long-term beneficial effect on physical authenticity and integrity of historic structures. 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. Thereby, the new long-term maintenance cost analysis service of MOWAv enables an optimal investment of financial and societal resources in maintenance interventions and spending resources to resolve the most urgent issues within available budgets.

Despite MOWAv's capacity and efficiency in terms of quality protection and indirect innovative economic process, its current model requires additional methods of operation in terms of skill building, market organisation and public participation to effectuate long-term impact and sustainability.

Complementary, theoretically sampled examples of MOWA models and consecutive mechanisms indicate prospective methods of operation:

- **Activating a maintenance market:** the UK MOWA pilot was set up by 'Maintain our Heritage' (MoH), a mainly voluntary pressure group established in 1999 to raise awareness on preventive conservation in the UK. In line with the pilot results, English Heritage and the Heritage Lottery Fund provided financial support for a number of maintenance initiatives. One specific initiative aimed at directly stimulating the maintenance market was GutterClear, a collaboration between MoH and the Diocese of Gloucester aimed at developing a simplified and replicable gutter and roof inspection and clearance service. In practice, the GutterClear scheme promotes a direct communication between church councils and contractors. Herewith, the church council has to contact a local contractor and ask a quote for a building inspection and gutter clearance and after only after completion a reimbursement of the VAT can be asked from the GutterClear scheme. Since 2007 the scheme is operational without additional funding, but very strong and persistent marketing of the service are essential. The capacities and process required for the scheme prove replicable as a number of other similar GutterClear schemes are now operating in various other English Dioceses.
- **Skill building:** In 2014, following an extensive development process by the Stirling City Heritage Trust (SCHT), a 5 year Scottish MOWA pilot project was established. The 'Traditional Buildings Health Check Scheme' (TBHS) is initiated by Historic Scotland in partnership with Construction Industry Training Board (CITB) of Scotland. The latter is a governmental organisation dedicated to education and training in the construction industry. Consequently, the Pilot scheme consists of 2 main mechanisms, i.e. the SCHAT covers the design, delivery and management of the MOWA membership service and Historic Scotland's Technical Conservation Group covers the training element of the project.
- **Public participation:** a cluster of specific post-MoH initiatives provide a complementary approach in terms of increasing awareness and actively involving owner-managers and local communities in built heritage maintenance. The initiatives follow the GutterClear scheme and were developed by the Society for the Protection of Ancient Buildings (SPAB) with support of the Heritage Lottery Fund. Since 2001, a National Maintenance Week is organised during the last week of November to encourage owner-managers to take care of their property by means of workshops, specific thematic days such as GutterClear day, networking events and sharing top maintenance tips. Next to this broad Maintenance

Week initiative, the Faith in Maintenance project focused on developing confidence and knowledge among church councils and local volunteers to implement appropriate maintenance interventions and repairs on religious built heritage.

At this moment, no MOWA model that incorporates all mechanisms into one framework is operational.

There is a lack of integrated maintenance policies based "chain awareness" that understand the role and contribution of all necessary "players" and that favours proper linking between them to come to an effective implementation. "Today Monumentenwacht as a good monitoring "partner" is a too isolated link in a not existing chain".

Changes for built heritage management in the Flemish Region

As demonstrated throughout the research, several actors in the Flemish Region accept that 'We have a structural problem with the maintenance of buildings in Belgium. We implement too little maintenance. For all buildings, including monuments. Anything that helps to boost the maintenance market, you should do'. The empirical data collection demonstrated that the different actors have their own contemporary barriers in developing a link between maintenance practices and sustainable development - with the market, (organisational) culture, governance and societal-end functions being the most pressing. The unifying factor in these barriers is the disconnected perspective on long-term planning and ad-hoc maintenance. With the exception of specific respondent groups during the empirical data collection process who called for more continuity in the sector, this disconnection also appears to be present in the current cognitive framework of most built heritage actors. For example, while owner-managers indicate to understand long-term maintenance and in practice implement just-in-time interventions, the government implements a subsidiarity oriented policy in which a more critical attitude of is demanded of them. Considering that the analysis indicated a clear necessity for practical support and knowledge among owner-managers, the current maintenance strategy within the new legislative framework, i.e. management plans, signify mostly additional burdens and will possibly remain limited to long-term 'activity plans' rather than a long-term planned understanding.

Changing the disconnected perspective

'Cost' is currently not only the main influencing factor in the built heritage sector and in extension maintenance process, but is literally ingrained in the cognitive framework of every actor and part of the current regime. Establishing a change towards a link between maintenance practices and sustainable development will therefore not succeed without significant incentives. At the same time, the current economic and organisational space within the Flemish Region is very confined. Direct financial incentives or reserves to gradually develop a long-term, albeit top-down change in the current regime is currently not a viable option.

During the empirical data collection process, 2 possible solutions were suggested by built heritage actors. The first is a short-term, symptomatic solution that directly targets a specific barrier, i.e. within the current maintenance market. To change the demand-supply paradox into a more symbiotic dynamic, maintenance contracts within a wider framework agreement were considered an interesting path. However, in practice and in terms of organisation, this mechanism still requires elaborate research and understanding on different levels. This mechanism is a potential incentive for different actors within the regime and therefore a small but well-focused leverage towards a sustainable development. However, as this leverage is focussed on a symptom where the stress is currently perceived very high, the risk is that initiatives will only work in the short-term and possibly become a constrain in the long-term.

The second suggestion is more a reoccurring direction by built heritage actors and entails a more long-term solution. This direction is essentially to create continuity in awareness, in interventions, in the market and develop a closer local collaboration among actors to enable efficiency and competition. This direction is shared by different sub-groups, i.e. the governance actors aiming towards subsidiarity, the market actors

pointing out a continuity of employment and the cultural sub-regime that endorses the need for preventive conservation. However, the specificities of how this direction can evolve are not clear and anew several barriers can be identified in terms of applicability, possible organisational features, and requirements, i.e. there is a significant gap in knowledge, experience and procedures. Moreover, current formats for local government collaborations are possibly conceived from a too structured thinking process and therefore not open to local dynamics.

During the analysis existing, organisational maintenance service models developed by local actors and starting from a direct demand were identified. The essence herewith is the societal-end function of the service models and direct links to sectors outside of the current built heritage actors, i.e. social economy sector. Whereas these initiatives offer a possible direction, they have not yet proven their long-term effectiveness and the current regime is not susceptible to inter-regime collaborations. Moreover, the empirical data collection demonstrated that new knowledge is required on the quality of social employment in built heritage maintenance activities and that long-term commitment of local actors to a single ambition and the set-up of these collaborations is not evident. Finally, the need for a new organisational culture is not a priority for any actor in the built heritage sector and would require significant investments with a long-term perspective. Investing time and money to develop new skills and service models require an up-front 'costs' which do not provide immediate return.

Herewith it should be stressed anew that the scope of this research is on the implementation of maintenance interventions rather than large scale restoration and conservation projects. The actual dynamics among demand and supply in the built heritage maintenance market are an important factor within the built heritage sector in the Flemish Region. A study commissioned by the Flemish government aimed at mapping the socio-economic return of the built heritage in Flanders indicates that the built heritage sector has a considerable return on investment (De Baerdemaeker et al., 2009). In 2009 a total investment of about 125 million euro was invested in different sectors that benefit the maintenance and conservation of built heritage. The total added value of the economic activity related to the built heritage sector was estimated at 900 million euro. In addition, a built heritage satellite account based on turnover, added value and employment figures enabled assessing the impact of built heritage in specific sectors i.a. to which extent the annual added value of the construction industry is generated by built heritage works.

Input	Operating funds (million euro)	Subsidies (million euro)	Employment (FTE)
Flemish Government	33	125	502
Output	Turnover (million euro)	Cumulated added value (million euro)	Cumulated employment (FTE)
Construction industry	269	235	3066

Table: annual added value of the construction industry generated by built heritage works.

Based on (De Baerdemaeker et al., 2009).

Due to the lack of precise data it is herewith not possible to differentiate between restoration and maintenance works. Nevertheless, it is assessed that from the total amount of 125 million euro, solely 62 million euro is covered by Flemish Government. The remaining amount is provided by other authorities, as well as local built heritage owners-managers. Considering that the study did not include private investments outside the premium circuit, a considerable impact of the restoration and maintenance sector within the BH sector can be assumed. Moreover, the inventory of the Flemish Heritage Agency sets the number of built heritage structures or objects in the Flemish region at ca. 73. 600, implying a vast amount of local built heritage owners-managers who deal with practical issues concerning the maintenance of their properties.

However, when analysing the maintenance market in the Flemish Region, a specific paradox was observed, a paradox of a relatively high maintenance demand and supply, but clearly underdeveloped maintenance market and related services for built heritage. This is due to different tendencies, problems and barriers identified by both owner-managers and contractors. Although MOWAv has taken on a crucial role in the ongoing maintenance dynamics and demonstrates the existence of a demand side in the market, the majority of owner-managers do not indicate a long-term planned attitude. The combination of the demand side requiring mostly sporadically maintenance interventions and a mainly mouth-to-mouth advertising on the supply side has over the years led to a vicious circle. The apparently low demand leads to unmarked supply, which in turn does not stimulate or inform demand.

Consequently, 'we have a structural problem with the maintenance of buildings in Belgium. We implement too little maintenance. For all buildings, including monuments. Anything that helps to boost the maintenance market, you should do' (respondent 05: 1.42.02) In contrast to the late 1990s, there is today a commonly held consensus that the market will not regulate itself and therefore requires diverse and manifold incentives and changes. Current maintenance practices are not conducted according to specific procedures and is frequently conducted without formal contract, supervision or specialised monitoring. Organisational structures commonly used in construction industry, such as stock tenders or specialised maintenance services, are not often considered in context of built heritage. This creates an additional barrier for an operational maintenance market in terms of i.a. applicability, possible organisational features, pricing, and requirements, i.e. there is a significant gap in knowledge, experience and procedures.

The currently only reoccurring direction in this gap is the need for continuity. Continuity in awareness, in interventions, in the market. 'Continuity is essential. If you do something today, it can be magnificent, but you should also take into account how this will manifest itself in time. That also means continuity for the profession, continuity of employment. Someone who works as a craftsman will never be rich, I'm sure, but you can build something that ensures continuous employment. This certainty and value of the profession should be communicated to the younger generation' (respondent 12: 10.20). This overall perceived direction is very much in line with a preventive conservation approach and long-term planned interventions.

However, specifically within the contractors' respondent group, skills shortages and need for qualitative training courses is receiving more attention than organisational problems and other influencing factors. The need for a new organisational culture is, logically, not a priority for contractors and would require significant investments from their side. From the owner-managers demand side, which can clearly benefit from practical support in and knowledge on maintenance, participating in a new organisational structure which is not yet fully established signifies additional burdens. Moreover, the overall organisational culture, i.e. mutual interests and contrasting understandings are pivotal in the PC process, for all BHM actors. The value attached to maintaining one's property or added value of skilled craftsmen logically differentiates from heritage value, a term which was referred to by only few respondents. The limited consideration of the identified issues creates additional tension within the maintenance market.

Finally, it should be stressed that 'cost' can be interpreted as not only the main influencing factor in the maintenance process, but is literally ingrained in every mind-set of every actor and part of the current regime. Consequently, establishing a change within the current maintenance market paradox will not succeed without significant financial incentives. Herewith, it is not clear from where incentives or support can be expected. Most respondents do not have a positive foresight on built heritage maintenance. 'We expect that a downfall is coming. In any case, one is going to be more selective with premiums. One is only going to allocate premiums to real heritage value. It could be that there will be no more subsidies for just roofs' (respondent 07: 1.09.00). In addition, 'the real impact of the crisis is still to be seen. The volume of works has decreased and will continue to decline' (respondent 04: 1.05.34). This implies not only private owner-managers, also 'I'm very pessimistic about the future for works where local governments are the client. We fear a severe downturn of local governments as building patrons' (respondent 05: 1.10.24). In case local

governments fail to accommodate the maintenance needs of their properties, their support in facilitating changes or incentives can be assumed rather limited.

In line with the Cultural Heritage Counts for Europe research, the Leuven team stresses the need for a new resource framework for built heritage projects that starts from extrinsic funding and cross-sectoral development. The CHCfE research demonstrates that direct investments in built heritage do not only contribute to the cultural, but also the economic, social, and environmental domain. Despite its large evidence based value, this downstream' view on resource investments mostly validates the past and current assessment of built heritage impact.

In contrast, the new resource framework should be based on a more 'upstream' perspective on built heritage impact, whereby traditional investment schemes are linked with resources from other sectors. This implies introducing non-heritage funding in built heritage to achieve non-heritage goals, such as social cohesion or reducing unemployment.

In the past similar mechanisms were developed for the maintenance sector in the Flemish Region. Although seemingly unrelated to BHM regime, the early 1990s welfare state reform in Belgium had a large impact on contemporary practices (Kuipers, 2006). Pressures on the social security system led to the introduction of employment strategies which took into account that a large low-skilled and / or long-term unemployed groups needs additional support too function in a normal working situation. In practice, this led to the 'jeugdwerkgarantieplan' (JWGP) to facilitate better school-work transitions. By the end of 1993 MOWAv was specifically asked by the Flemish Minister for 'Monumentenzorg en Landschappen' to act as a project promoter in the JWGP framework. Acknowledging from the beginning the valuable social objective of the project and understanding its potential to demonstrate the beneficial effects of regular small-scale maintenance and management work for BH, MOWAv engaged by creating 75 workplaces in 25 sites. Specifically, a convention was adopted between the Flemish Minister for 'Tewerkstelling' and the Flemish Minister for 'Monumentenzorg en Landschappen' to arrange the salary subsidy in the budget agreement. Additional employment costs for the overall organisation framework, i.e. involving workers counselling, general project management, and participants equipment were settled in a separate convention adopted between the Flemish Minister for 'Monumentenzorg en Landschappen' and MOWAv. Within the JPWG, MOWAv acted as the legal employer and appointed 1 internal project supervisor. However, to enable local support, MOWAV called upon its Provincial NPOs to outsource the actual social and professional guidance to one specific external organisation. Vitamine W VZW in Antwerp, IGO-Leuven in Flemish Brabant, ECCRR VZW in Limburg, VZW Merlijn in Oost Vlaanderen and RISO-WVL in West-Vlaanderen all signed up to assist in recruiting unemployed, advising on the candidate selection, social counselling and professional guidance towards the normal employment circuit. Each local project was responsible to permanently make available technical guidance and material resources. In practice, the local projects focussed mainly on maintenance, management and preparatory restoration works, entrusting the actual restoration works to the traditional building and contractor sector. The scope of the working places were sites owned by public governments, provinces, cities and NPOs but no private BH owners or managers (De Tijd, 1994).

The first unemployed entered the MOWAv JWGP by the end of 1994 and the project ended on 31/12/1995. In terms of overall evaluation, youth prospection through the VDAB was soon perceived unproductive and inaccessible, while other more local recruitment channels like municipal 'Plaatselijk Werkgelegenheidslijsten' (PWA) proved successful. Nevertheless, as previously noted MOWAv achieved a high success rate because the JWGP was conceived as a social work experience project, rather than pure financial benefit as some of the other project promoters. The implementation of permanent local employment counselling was a pivotal mechanism, however, a similar level of technical support was not achieved within the JWGP MOWAv. The post-evaluation observed that especially in the starting phase there permanent technical guidance on site, preferably by mentors with youth or social work experience, is required. Whereas the organisational structure determined that MOWAv was the legal employer of the youngster and not the local guidance, this was not always the case. Moreover, the contracts between MOWAv and the local projects did not explicitly

specify what permanent technical guidance entails. The specifications were limited to 'daily employment, and in particular the technical guidance and perfection of x number of youngsters during the works. These works entail common management and maintenance works or works in preparation for a restoration. The works are not in competition with the general construction and restoration sector. They do not require special skills from the young participants and are customized to their individual capacities. The possibility for social support and training is facilitated; work will be adapted for all weather conditions. The works do not affect the buildings and their surroundings in their historical or other value. If necessary, advice will be asked in advance from the competent authorities (including the 'Bestuur Monumenten en Landschapzorg') and / or experts in the field' (Overeenkomst MW-JWGP/94/LP/08, art. 1, intern document MOWAv, as included in Jennes and Struyven 1996: annex 5).

In terms of efficiency for the BH sector, i.e. production hours by the FTEs vs invested resources and expenditures by local projects, the final balance is positive. Despite this structure, it can be assumed that the organisation lot-size depending on set-up cost can be optimised, i.e. employing an efficient number of participants to reduce counselling and guidance costs. In terms of effectivity, i.e. post-employment impact, 1 month after the JWGP 40% of the youngster were employed, 6 months later 47%, 12 months later 42%. Considering that the inflow in the normal economic circuit was higher in comparison to both other JWGPs and a control group of non-JWGP employed youngsters under the age of 25, the MOWAv JWGP results entail an overall positive gross-effectiveness (Jennes and Struyven, 1996). Moreover, the JWGP is a job creation model in which participants are provided with an indefinite duration contract with a normal salary, which is a strategy focussed on subsidising the labour demand and in essence limits an inflow to the regular labour market (Seynaeve et al., 2004).

In terms of the ST-regime development, the JWGP represents 2 very important tendencies. On one hand, a wide range of actors observed the added value of the low-skilled and long-term unemployed- BH synergy. On the other hand, as the KBF was closely involved and invested resources in the anticipated MOWAv JWGP pre-funding problems, the organisations network was considerably enlarged to include various training and education projects and local BH organisations.

However, as the world economy was hit by a series of crises and recessions, other approaches to fund built heritage gained increasing attention in the public and private sector. This induced an instrumentalisation of cultural heritage policies and a recognition of built heritage in other policy sectors. This is reflected in the 1995 Flemish government budget draft which states that resources for protection are indeed necessary to maintain the quality of our surroundings but also for the employment sector (Vlaams Parlement, 1995). Consequently, the main focus gradually shifted from small maintenance works to the large economic impact of the restoration sector and the Flemish Government moved away from the link with social economy.

Today, due to continued economic and social pressure, other more independent initiatives are taking place on a local scale, such as 'Sociaal Ondernemen Brugge' Sobo @ Werk vzw. This is a NPO established as a social work place in 2004, after a fusion with the special youth care organisation 'de steiger' (Steunpunt Arbeidszorg West-Vlaanderen 2016, Sobo @ Werk vzw 2016). The NPO works according to the roundtable 'Arbeidszorg' vision text, an initiative established in 2000 by the KBF and 'Samenwerkingsverband Sociale Tewerkstelling' (SST), the Flemish umbrella organisation for social work places and labour care centres (Ronde Tafel Arbeidszorg, 2016). Funded by the Province West-Vlaanderen, Sobo @ Werk vzw is active in the region of Bruges and has a special division dealing with cleaning works in large constructions. This mechanism originated from the employment gap of disadvantaged groups, in particular women. In collaboration with MOWA West-Vlaanderen, many church managers were convinced of the mutual benefits and at present approximately 80% of the local church fabrics calls on the NPO to maintain their heritage. The preventive cleaning works are implemented according to the MOWA West-Vlaanderen reports and guidelines (Provinciale Ontwikkelingsmaatschappij West-Vlaanderen, 2013).

The position of these new activities outside of the 'main' regime actor routines probably provided the required situation to develop innovative services and combining different resources. In concerto, local actors

introduced new organisational service models and even roles, i.e. (1) monument maintenance teams funded by the province and operational in multiple locations within an arrondissement, (2) social economy funded NPO maintenance teams on city scale, (3) 'leerwerkbedrijven' or apprenticeship companies as successors of the WEP+ mechanism. These initiatives appear to have a more impact as they are created from a direct demand, are less focussed on large restoration and more related directly to the social economy sector. Whereas most of these initiatives are rather recent, it difficult to predict their long-term sustainability.

MONUMENTENWACHT IN THE NETHERLANDS

In the Netherlands, interactions with monuments have been seen for a long period as more than only preserving historic fabric. On the one hand, in the last decades a shift has been implemented regarding subsidies, favouring maintenance instead of large scale restoration projects, with the idea that by this policy large scale restorations would be the exception. In order to implement this policy, initially extra subsidies were handed out in order to improve the state of conservation of (important monumental) buildings to achieve a level of conservation which would allow only maintenance. In this context, Monumentenwacht has been contributing to this change with insight in the state of conservation and stimulating owners to carry out maintenance for more than 40 years.

On the other hand, Dutch society and Heritage Care Agency are open towards adapting and re-using historic buildings. Some of these have become international icons for conservation / re-use (Backer, Camp, and Dicke, 2005; Meurs and Van Thoor, 2011) and can be seen as a cultural export of the Netherlands (Meurs and Steenhuis, 2017). Adaptive re-use increased significantly in the last 10 years in the Netherlands; the motivation is less finically driven, but is a combination of the following factors: the quality of design of adapted buildings, a bottom-up approach with an empowered citizen reflecting local needs, sustainability (circular economy), and the added value of identity for citizens (Meurs and Steenhuis, 2017: 5). It is seen as an “important pillar of the creative industry” (Meurs and Steenhuis, 2017: 8)

Regarding the design quality, architectural education includes since more than a decade ‘transformation’, combining design, heritage values and conservation techniques, inspiring students to interact with the built heritage while being aware of social and economic boundary conditions (Kuipers and De Jonge, 2017). The sheer quantity of vacant buildings (Kuipers and De Jonge, 2017: 28) makes this task broader than only conservation projects.

A successive step after adaptive re-use, large scale conservation or restoration works should be maintenance, where the monitoring work of Monumentenwacht should be structurally planned, independent of the type of intervention and ownership. However, the benefits of this this phase still requires more awareness amongst custodians of historic / existing buildings.

Thanks to MW the overall quality of monuments is kept on a good level. This is also due to the training and education of craftsmen, and the control of contractors’ work by Monumentenwacht.

For clarification, our research focuses on the role and activity of an organization – Monumentenwacht – and not on conservation projects: from the research information emerges on the conservation process.

Monumentenwacht (MW) activities are at the basis of the conservation process, and not necessarily of conservation projects.

The actors vary depending on type of monument and owner:

- Only the owner and Monumentenwacht.
- Owner / Monumentenwacht / contractor.
- Conservation teams (boards) incl. the owner, user, an architect, different contractors, advisors of the Dutch Heritage Agency, Monumentenwacht.

The goals and objectives of MW North Brabant are to support owners to maintain historic buildings and act preventively.

Monumentenwacht North Brabant actively tries to remain independent from the restoration market.

This is supported by the Province, which understands the importance remaining independent from the market and the government ¹, and therefore gives funding. To maintain their quality, inspectors are trained within the organization and their knowledge regularly updated.

Owners act depending on:

- Type of building and responsibility.

¹ Here, Monumentenwacht North Brabant deviates from the Flemish set-up, where it has become part of the government.

- Funding.

Monumentenwacht North Brabant: the main asset are monument inspectors (Monumentenwacht Noord-Brabant, 2014). By choosing craftsmen instead of engineers or architects, the costs of the inspections are contained².

Monumentenwacht North Brabant is financed by grants, membership fees, and costs for the inspections. For the province of Noord-Brabant, the yearly membership fee for 2016 is 55 €, and for the inspections and writing of the report, an hourly fee of 28,50 € is charged (Monumentenwacht Noord-Brabant, 2016). It receives yearly subsidies from the province and from the Molenstichting (Foundation for mills), in 2014 these were in total 1.417.593 €. In the same year, 133.815 € from membership fees, and 478.778 € from inspections were generated. This means, that ca. 70% of its income is based on subsidies. As it is a non-profit organisation, MW does not charge VAT for the inspections.

Owners: The owners' investment varies. Maintenance of rijksmonumenten (national) monuments is supported in two ways in the Netherlands. For monuments with a housing function, up to 80% of the maintenance costs can be deducted from the yearly personal income tax. Hereby, maintenance (onderhoud) is defined as replacement or repair of parts of the national monuments in order to maintain or make the building functional, including works due to overdue maintenance. For monuments without a housing function, owners can apply for a six-year grant within the national decree BRIM (Besluit rijkssubsidieëring instandhouding monumenten). This decree, however, excludes gemeentelijk (local, municipal) monuments. However, for private owners or smaller parishes, the financial burden of maintenance can be too high to carry out essential works as subsidies do not cover 100% of the costs.

Owners of iconic buildings like large churches or cathedrals can additionally to subsidies raise funding / receive donations, rent the building for activities (concerts, visitors, selling of souvenirs etc.). This allows them to involve more experts in the conservation process (restoration architect, advisors, specialist contractors etc.).

Privacy can be a problem in the elaboration of the results of the research.

In order to better understand and especially quantify (also economically) the interventions more data for research would be necessary. In most cases no documentation of the interventions (material used, costs, methods...) is kept.

The questionnaire we are currently preparing is meant to gain more information to support our statements (more response – quantitative data).

Private owners of dwellings and small monuments and municipalities possessing local monuments, often seek the guidance of the inspectors of MW, only.

In case of larger objects, such as large churches, a board consisting of the owner, user, restoration architect, a Monumentenwacht inspector, and of a representative of the Dutch heritage care agency will decide about interventions.

Generally speaking MW indicates the necessary interventions to preserve the building and its materials, techniques, identity: transformation and adaptive re-use involve more actors, who need to consider the material and immaterial values of the building.

SWOT Analysis Monumentenwacht Nord Brabant

Strengths

- Experience and craftsmanship of Monumentenwacht inspectors.
- The possibility to climb on buildings / roofs.
- Immediate repair of minor damages in hardly/not easily accessible locations, preventing further damage and hence limit costs of repair.

² In this aspect, the Dutch system varies from the Flemish system.

- The independent position of MW, creating respect from different parties (owners, contractors, government).
- Low costs and threshold for owners to become a member.
- Good relationship between owners and inspectors.
- The capacity to inspect monuments at least every second year, if not yearly.
- Common problems of historic buildings allow the gathering of large data on degradation, and improve the efficacy of the interventions.

Weaknesses

- Investigations on the damage signalled are not always carried out.
- Different types of damage found are handled separately, even when connected as being caused by the same mechanism.
- Reports do not address explicitly threats towards building elements with a high cultural value.
- The knowledge of MW does not cover all material types, especially those introduced during the late 19th early 20th century; yet this problem is being addressed with the continuing education of their inspectors.

Opportunities

- Statistical data about the monuments and their state of conservation (Erfgoedmonitor), and monitoring the effect of policies related to the technical state of the monuments.
- Long-term data on the progress of damages and the efficacy of interventions.
- Creation of a patient file documenting damages, known causes (e.g. external reports handed over by owner) and types of interventions in order to monitor the monument and learn from experience.
- Increasing involvement of owners (incl. knowledge dissemination, workshops etc.).
- Show owners the importance of a well-supported diagnosis and documentation.
- Show owners the need for scientific investigations and the expected financial advantage.

Threats

- Some owners rely on the authority of MW reports for deciding on the intervention on their building.
- As the damage symptoms are not analysed in the context of the entire building (exterior, interior, different elements), relationships between damage symptoms might not be noticed and thereby their severity misjudged.
- Empathy with the owners and giving more support/advice outside their reference.

In the case of projects like long term conservation of iconic buildings or transformation of existing monument, Monumentenwacht needs to be permanently involved. That means that Preventive Conservation should be an integral part of the planning,

The philosophy of conservation for The Netherlands, as developed and supported by RCE – Cultural Heritage Agency of the Netherlands and ERM Dutch foundation for a recognized restoration standard in the preservation and restoration of historic buildings and sites should be translated into a clear sequence of steps to be taken by the owners of monuments.

Infrastructure needed for conservation and maintenance:

- Experts are needed, more people should be trained as specialized advisers.
- Material research: create more possibilities (labs, ...) to have affordable and good quality research carried out.

Historic building conservation implies the involvement of different specialists, tackling history and (historic and technical) value of the building and preparing the base for the interventions (incl. transformation).

The sustainability of the building needs involvement of experts, architects and specialized craftsmen and other stakeholders.

In the Netherlands, the focus on cultural and historical values since the Belvedere Nota (Ministerie van Onderwijs Cultuur en Wetenschap, 1999) and Nota over het architectuurbeleid (Ministerie van Onderwijs Cultuur en Wetenschappen et al., 1996) has strengthened the position of Heritage and made its preservation an essential part of any project.

In the Netherlands, the re-use of historic buildings is often part of regional planning. For example the re-use of the 'Leerfabriek', a Leather factory in in the centre of the town Oisterwijk, is a way of tackling the problem of ceased industries and reviving towns which were depending on the industry. In case of the studied cathedrals, their importance for the Netherlands is a reason why they have received additional subsidies.

In another case, the owner was a foundation, investing in heritage with the intention to generate money for their investors. Heritage has been understood as a resource for city branding.

VALTELLINA CULTURAL DISTRICT

The partnership of the VCD was established by Sondrio provincial administration, municipalities (Morbegno, Sondrio, Tirano, Valdidentro), mountain councils (Morbegno, Sondrio, Tirano, Alta Valle), others boards, associations and foundations involved in the development of local economy, tourism and culture. The project also involves funders such as Sondrio Chamber of Commerce, local banks, an electricity production company and some regional administrations of the nearby Switzerland territory.

The project leadership was assigned to Fondazione di Sviluppo Locale (Local Development Foundation), a Foundation that is owned by all the partners and funders of the project.

The goals of Valtellina Cultural District are:

- to identify the role that the cultural landscape and heritage have in the development strategy of territory;
- to develop the identification and awareness of local communities;
- to enhance the cultural heritage;
- to make a system of cultural activities.

The Cultural District was developed paying attention both to the contents and to the economic resources, with a special attention to activate specific tangible interventions with the characteristics of economic feasibility, representativeness and capacity to create tangible and intangible networks on the territory.

The project develops specific work packages aimed to conservation works, preventive planned conservation, maintenance activities, skills/capacity enhancement, community involvement, and valorisation activities.

In Italy during the last 30 years there was a relevant decrease of the public resources used to fund cultural projects and this fact has forced the project partners to provide an increasing amount of their own resources in the recent projects. In the study area this trend is well explained by the following data:

- **“Legge Valtellina”** project (1990-2002) for a total amount of € 35 MLs funded with 75% of external resources (from the state) and 25% of resources of the partners.
- **“Antica Pieve di Mazzo”** project (2006-2009) for a total amount of € 1,991,000 funded with 59% of public resources (from cariplo foundation) and 41% of resources of the partners.
- **“Palazzi Besta”** project (2009-2010) for a total amount of € 345,000 funded with 56% of public resources (from cariplo foundation) and 44% of resources of the partners
- **“Valtellina Cultural District”** project (2011-2015) for a total amount of € 8,290,000 funded with 43% of public resources (from Cariplo Foundation) and 57% of resources of the partners

The human capital is set up by the local group involved in the VCD feasibility study (about 7 persons with the following specializations: coordinator, economist, lawyer, engineer, architect, public administrator, marketing expert + secretary) and by the local group involved in the VCD management (about 7 persons with the following specializations: president, accountant, referent for the tangible assets, referent for the intangible assets, secretary, historical, marketing expert + staff).

A relevant aspect is the full cooperation of the consultants that developed specific work packages of the project and of the technicians of the public administrations that coordinated the activities on the territories.

The good outcomes of the VCD experience are based on the opportunities provided by the territory in which the District was settled. In Valtellina there is a strong and clear integration between cultural heritage and landscape and the territory is coherent and the people recognizes his identity, although sometimes it is not properly defined. Furthermore the territory has proved to be ready to process complex development projects mainly thanks to the experience gained on other previous projects

Local and regional authorities are available to work together, although mostly on tangible assets. The project was also developed with a strong proactive involvement of supervisory boards: Superintendents (Architectural and Cultural Heritage) and also Denkmalpflege, that is the key element of the adequacy of the developed work.

It was helpful for the development of the project the fact that the project itself was based on very clear methodological guidelines provided by Cariplo Foundation, suitable to pursue a wide and adaptable grid of

goals that were defined by local teams. Anyway, the experience has shown that the territory has initially struggled to recognize the endogenous quality of this project, especially because of the opposition in the local culture sector. This problem was limited with a wide activity of presentation and sharing of the project and operating to enlarge the partnership trying to be as inclusive as possible.

In Valtellina already exists a touristic model based on skiing and on second homes that nowadays is obviously outdated; this consideration is shared, but large capitals are yet invested in that direction, rather than in other innovative and sustainable sectors such as Heritage valorisation.

A relevant weakness of the project was the quality of the management, both external and internal to the District: there is lack of effective representativeness in the persons who should institutionally represent the territory, and this makes it difficult to recognise the true needs and the effective available resources to properly implement the project. At the same time on the internal side it was weak the actual belief of the project management and it was weak also the will to invest in future projects useful to give continuity to the activities of the Cultural District.

Moreover, a relevant difficulty was due to the administrative upheavals that occurred in Italy over the recent years, such as the abolition of the provincial administrations that has caused the gradual missing of the reference territorial authorities that initially sustained the start-up of the District Project. This problem was overcome by the settlement of the Local Development Foundation, that was set as an independent entity.

Another weakness for the project is due to the fact that Cariplo foundation in the first three years has invested huge resources in the project, but it does not provide resources to ensure the effective start-up of valorisation activities for three additional years

The tangible goals are a powerful means of aggregation of the local interests around the project, but the importance of investment on tangible assets has sometimes overshadowed the need to operate also in a robust manner on intangible assets

It was also important to increase the reputation of the project involving training activities that have been widely shared.

The partnership succeeded to be as inclusive as possible and the VCD have brought a significant increase in reputation through its activities.

It has an important significance the fact that there are a number of following projects that were developed on the territory from different subjects starting from the same key words of the VCD. This fact certifies that the seeds of the Cultural District are sown in depth and are sprouting in a positive way.

In the following table there is a synoptic view of these projects:

Key words	Maintenance	Conservation	Valorisation
Cultural landscape	+++ project	cultural landscape of media Valtellina	
Cross border cooperation		CPREproject	ConValo Re

- CPRE project : Planned Conservation in the Rhaetian Alpine common space.
- +++ project : #MorePositiveSigns.
- Conservation and valorisation of the cultural landscape of media Valtellina.
- ConValo Re project: Conservation and valorisation in the Rhaetian Alpine common space: cultural heritage and Cultural Landscape of Valtellina and Valposchiavo in the framework of UNESCO.

The recommendations for the listed purposes have to be related to the weakness our project has revealed:

- It is necessary to have a strict control on the quality of the management, the belief of the project management in the development of the project and the need to invest in future projects to develop the activities.
- It is necessary to have a strict control on the effective representativeness of the persons who institutionally represent the territory: there is the necessity of a careful and correct preliminary analysis of

the true needs and the effective available resources of the territory - there is also the necessity to have public administration suitable to be involved in broad and long-term planning projects.

- There is the need to have longer period of start-up of the project that, according to my experience, requires at least 6 years to become actually operational.

Each one of the actors involved within a development project has his own specific goal:

- Public administrations are interested in the large area development.
- Municipalities are especially interested in the execution of tangible interventions.
- Foundations are interested according with their own goals (historical studies, cultural development, conservation of landscape etc.).
- Other entities are interested in touristic development or agricultural development or craftsmanship development.

The fundamental purpose of a large area project is to hold together all these expectations and direct them towards common goals.

In the actual global world, there is a strong need to know our own identity, that, according to my opinion, means to understand what are (and where are) our own roots. This is not aimed to close door (or to rise walls) against other people, but it aims to open doors but, at the sometime, to improve the consciousness of our own possibilities and competences.

In this sense Heritage is a part of strategic global plans of development because it is a powerful lever to help people to identify their own culture and identity.

CONCLUSION

Shifting collective decision-making sphere to collective-collaborative governance model refers to the process in which the stakeholders work as a team in a cooperative-collaborative way in terms of governance system. The process expands the democratic participation, increases the benefits, and reduces the management and decision-making costs. The continuous process of collaborative and cooperative governance gives the opportunity for the stakeholders to engage in productive dialogue, develop a positive and fruitful relationships, and equip the participants with a variety of long-life learning skills such as; problem solving, team work, negotiation, bargaining, planning, fundraising, and commitment to public interests.

Based on an experience analysis of the Halland Model and a strategic analysis of different historic conservation projects within the Halland project, our findings are largely empirically inductive. In analysing these projects, our goal has been to identify the opportunities that consolidate and facilitate the process of the trading zone collaborative decision-making venue.

Professionals in historic conservation and planning agencies can use the development process of The Halland Model to identify key challenges and limitations to their collaborative planning and decision-making process.

Since 1993, The Halland Model has viewed as a catalyst for sustainable development. The Halland Model states that utilizing “trading zone” as a democratic pluralistic arena in historic conservation’s decision-making process is the catalyst for sustainable regional development. The model developed where the “trading zone” defined as an active melting pot aiming at assisting various actors and stakeholders including; developers, conservators, public sectors, and public representatives for making sense together.

However, in this paper we conclude by emphasizing that the governance process of implementing trading zone philosophy was missed, especially, those variables which related to the durability and governance factors of public sphere. This paper suggests practical process aims at making enhancement for the model in order to achieve an integrated vision of historic preservation within regional development planning process. In this way, collective (cooperative-collaborative) governance sphere “the enhanced model” is constitute by the stakeholders and the members of an inter-communicating community, situated in the particularities of time, place (value and significance), and regulations (historic preservation, development, and planning) aiming at guiding and managing sustainable long-term actions. The enhancement of The Halland Model shows not only how to make sense and taking decisions together, but also working out how to act together.

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