

CULTURAL

HERITAGE

COUNTS

FOR

EUROPE

FULL REPORT

CULTURAL HERITAGE **COUNTS** FOR EUROPE

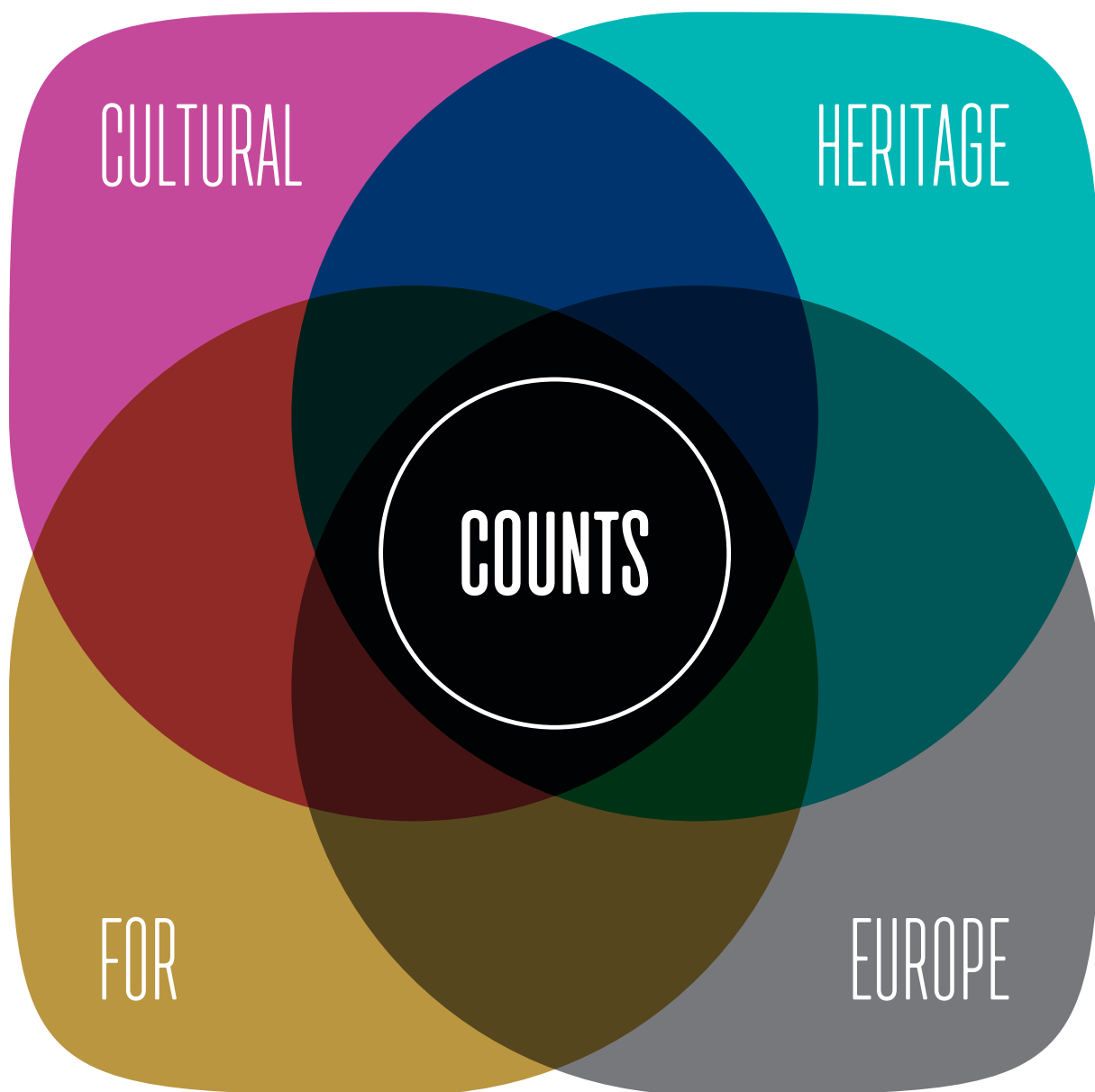


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FULL REPORT

THE CHCFE CONSORTIUM

● EUROPA NOSTRA (The Voice of Cultural Heritage in Europe):

STEERING COMMITTEE: John Sell, Executive Vice-President;
Piet Jaspaert, Board Member and Sneška Quaedvlieg-Mihailović, Secretary General
PROJECT COORDINATION: Louise van Rijckevorsel
and Danaé Anastopoulos-Chaimowicz, Brussels Office

● ENCATC (The European Network on Cultural Management and Cultural Policy Education):

STEERING COMMITTEE: Prof. Dr. Claire Giraud-Labalte, Chair of the ENCATC Thematic Area Understanding Heritage and ENCATC Ambassador
PROJECT COORDINATION: GiannaLia Cogliandro Beyens, Secretary General
PROJECT COMMUNICATION: Elizabeth Darley, Director of Communications

● HERITAGE EUROPE (The European Association of Historic Towns and Regions):

STEERING COMMITTEE: Brian Smith, Secretary General

● INTERNATIONAL CULTURAL CENTRE, Krakow (ICC):

STEERING COMMITTEE: Prof. Dr. Jacek Purchla, Director
PROJECT RESEARCHERS: Joanna Sanetra-Szeliga and Dr. Katarzyna Jagodzińska,
Research Institute for European Heritage

● RAYMOND LEMAIRE INTERNATIONAL CENTRE FOR CONSERVATION at KU Leuven (RLICC):

STEERING COMMITTEE: Prof. Dr. Koenraad Van Balen, Director
PROJECT RESEARCHERS: Aziliz Vandesande, Clara Thys and Dr. Sigrid Van der Auwera

● THE HERITAGE ALLIANCE, England (UK):

STEERING COMMITTEE: Kate Pugh, Chief Executive



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THE CHCFE REPORT

RESEARCH TEAM

ICC, KRAKOW: Dr. Katarzyna Jagodzińska, Prof. Dr. Jacek Purchla and Joanna Sanetra-Szeliga with Przemysław Niedźwiecki and Dr. Karolina Tylus
RLICC, KU LEUVEN: Clara Thys, Aziliz Vandesande, Prof. Dr. Koenraad Van Balen and Dr. Sigrid Van der Auwera with Prof. Dr. Luc Verpoest

EDITORIAL TEAM

Prof. Dr. Claire Giraud-Labalte, on behalf of ENCATC
Kate Pugh, on behalf of The Heritage Alliance
Sneška Quaedvlieg-Mihailović, on behalf of Europa Nostra
Joanna Sanetra-Szeliga, on behalf of ICC, Krakow
Brian Smith, on behalf of Heritage Europe
Aziliz Vandesande, Clara Thys on behalf of RLICC, Leuven

PUBLICATION COORDINATION

Joanna Sanetra-Szeliga, on behalf of the CHCFE Consortium

GRAPHIC DESIGN Radoszek Arts

PROOFREADING Justyna Jochym, Anastazja Oleśkiewicz

TECHNICAL EDITOR Aleksandra Szczepan

PRINT Know-How

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FOREWORD



*Not everything
that counts
can be counted,
and not everything
that can be counted
counts.*

ATTRIBUTED TO
ALBERT EINSTEIN

I am proud to introduce the Cultural Heritage Counts for Europe Report which demonstrates the extraordinary power of our cultural heritage to improve the quality of our lives. In every corner of Europe, the wealth of heritage buildings and sites, historic neighbourhoods and cultural landscapes has the capacity to inspire and enrich us all and to help us foster and nurture a sense of belonging to a wider community.

Cultural heritage is a capital of irreplaceable cultural, social, environmental and economic value. This is true for Europe, as it is for the rest of the world. We know this in our hearts and minds, but the policies and investments necessary to sustain our heritage have to be based on more than profound feelings or strong beliefs. We also need facts and figures to prove and illustrate those convictions. Articulating the value of our heritage by providing quantitative and qualitative evidence of its benefits and impacts, will indeed give more strength to the voice of cultural heritage in Europe.

The thorough mapping and analysis of the Europe-wide evidence presented in this Report deepens and enhances our understanding, knowledge and awareness of the full potential of our cultural heritage as a key resource for sustainable development. This is essential to feed into local, regional, national and European decision making and thus provide a sound basis for effective policies for heritage. Such evidence, similarly, provides intelligible information for investors of all sorts — governments, commercial developers, private owners, philanthropists, civil society organisations — who need to compare options and make choices.

The six partners of the CHCfE Consortium have done Europe a valuable service in demonstrating the economic, social, cultural and environmental impact of our cultural heritage. I commend the collective efforts and combined academic and policy expertise and commitment of all six partners of the CHCfE Consortium. The outcome of this project proves the added value of European cooperation between partners with diverse academic and life experiences from North, South, West, East and Central Europe.

To end, special thanks go to the European Commission for their confidence and support to the Cultural Heritage Counts for Europe project. We welcome the recent unprecedented recognition by the European Union of cultural heritage as a strategic resource for a sustainable Europe. We believe that this Report will provide the EU Institutions and Member States an even more compelling narrative for further developing and implementing a holistic approach to heritage impact assessment and also an integrated approach to policy making with regard to cultural heritage.



On behalf of the CHCfE Consortium,

PLÁCIDO DOMINGO,
President of Europa Nostra

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EXECUTIVE SUMMARY

EXECUTIVE SUMMARY AND STRATEGIC RECOMMENDATIONS

THE CASE

THE PROJECT

The EU-funded project Cultural Heritage Counts for Europe (CHCfE) was launched in 2013 with an ambitious goal: to collect and analyse existing and accessible evidence-based research and case studies regarding the economic, social, cultural, and environmental impacts of cultural heritage, in order to assess the value of cultural heritage which was recognised in 2014 by the EU Council of Ministers “as a strategic resource for a sustainable Europe.” [↗](#) (Council of the European Union, 2014a). The project also aimed to provide conclusive evidence — both qualitative and quantitative — which would demonstrate that cultural heritage makes a key contribution to the *Europe 2020. A European Strategy for Smart, Sustainable and Inclusive Growth* [↗](#) (European Commission, 2010) at the time of its mid-term review.

The CHCfE project provides a response to the position paper *Towards an EU Strategy for Cultural Heritage — the Case for Research* [↗](#) (European Heritage Alliance 3.3, 2012) presented to the European Commission in 2012 by the European Heritage Alliance 3.3, an informal platform of 32 European/international networks and organisations active in the wider field of cultural heritage [↗](#). This paper identified, among others, a pressing need for evidence-based research on cultural heritage to support strategic policy developments both on European and national levels and thus ensure that the EU institutions and member states fully realise the potential of cultural heritage as a driver of sustainable development.

The report of the CHCfE project — with its key findings and strategic recommendations — is presented to the EU institutions and member states at a time when the new European Commission embarks on the implementation of the EU’s integrated approach to cultural heritage [↗](#) (European Commission, 2014), and also as a contribution to the newly defined ten priorities of the European Commission.

The first public presentation of the report takes place on 12 June 2015 in Oslo (Norway) at the conference organised as part of Europa Nostra’s Annual Congress,

in the presence of Mr. Tibor Navracsics, European Commissioner for Education, Culture, Multilingualism and Youth and Mr. Vidar Helgesen, Norwegian Minister for EEA and EU Affairs.

THE CONCEPTUAL AND POLICY CONTEXT

The past few decades have witnessed major conceptual and policy developments at both European and international levels which have recognised the multiple and valuable benefits that cultural heritage brings to society as a whole.

A fundamental transformation of the conceptual attitudes towards cultural heritage started with the first shift, identified in the 1970s, from a conservation-led to a value-led approach to heritage. More recently, there has been a growing recognition, not only across Europe but also in the rest of the world, of the all-inclusive nature of the historic environment, where tangible and intangible assets are no longer perceived as separate from one another. Equally significant, during the 1990s the principles of “sustainability” started to be included more and more prominently in policy documents on cultural heritage, increasingly combined with the objective of “development.”

More specifically, the conceptual framework and inspiration for the implementation of the CHCfE project was provided by the principles and spirit of the Faro Convention, adopted in 2005 under the auspices of the Council of Europe (Council of Europe, 2005) as well as of the Hangzhou Declaration, adopted more recently in May 2013 under the auspices of UNESCO [↗](#) (UNESCO, 2013). The Faro Convention puts people and human values in the centre of a renewed understanding of cultural heritage, while the Hangzhou Declaration recognises the value of cultural heritage as a driver for sustainable development.

The policy shift which led to the CHCfE project is reinforced today by an increased recognition of the importance of cultural heritage at the EU level. This became particularly evident at the Bruges Conference organised in December 2010 by the Belgian Presidency of the Council of the European Union [↗](#) (Council of the European Union, 2010) and also by the Vilnius Conference organised in November 2013 by the Lithuanian President of the Council of the European Union [↗](#) (Council of the European Union, 2013), both with the active participation of all key public stakeholders and civil society.

This policy momentum culminated in 2014 with a series of far-reaching policy documents adopted by the EU Council of Ministers, during the Greek and Italian Presidencies, namely the *Conclusions on Cultural Heritage as a Strategic Resource for a Sustainable Europe* (Council of the European Union, 2014a) (adopted on 21 May 2014) and the *Conclusions on Participatory Governance of Cultural Heritage* [↗](#) (Council of the European Union, 2014b) (adopted on 25 November 2014), as well as by the *Communication Towards an Integrated Approach to Cultural Heritage for Europe* [↗](#) (European Commission, 2014) which was adopted on 22 July

2014 by the European Commission. A further indication of the Commission's increasing interest in the wider potential benefits of cultural heritage is the recent publication, in April 2015, of the report produced by the Horizon 2020 Expert Group on Cultural Heritage. The report entitled *Getting Cultural Heritage to Work for Europe* ↗ (European Commission, 2015) sets out recommendations for an innovative policy framework and agenda for cultural heritage-related research and innovation up to 2020.

In addition, the EU *Council's Conclusions on a Work Plan for Culture 2015-2018* ↗ (Council of the European Union, 2014c) identified cultural heritage as one of its four priorities and indicated the need for the EU to invest in cultural statistics as a prerequisite for evidenced-based policy making with regard to cultural heritage. It is also important to note the "New Narrative for Europe" initiative ↗ (New Narrative for Europe, 2013), carried out in 2013 and 2014, recalled the vital significance of our shared history and heritage for the entire European project.

The same momentum of the policy for cultural heritage can be observed at the wider European level of the Council of Europe. Most recently, the 6th Conference of Ministers responsible for Cultural Heritage, which was held from 22-24 April 2015 in Namur under the Belgian Chairmanship of the Council of Europe, adopted the Namur Declaration calling for a "common European strategy for cultural heritage" to be defined and implemented by the Council of Europe, in close co-operation with the European Union and with intention of due involvement of those organisations representing civil society ↗ (Council of Europe, 2015).

Last but not least, the recent proposal by the EU Council, supported by the European Commission and the European Parliament, to organise in 2018 the European Year of Cultural Heritage provides a welcome challenge and framework for all heritage stakeholders, both public and private, in Europe to join forces and raise awareness of the value and multiple benefits of cultural heritage for economy, society, culture, and environment.

The above-mentioned conceptual and policy developments affirm the importance of cultural heritage as a strategic resource for a sustainable and peaceful Europe. They also demonstrate the determination of the EU institutions to develop and implement an integrated policy approach to cultural heritage. Therefore, it is crucial that the EU institutions and member states (at all levels of governance) invest over the coming years the necessary resources in collecting quantitative and qualitative data on the impact of cultural heritage on the economy, society, culture, and environment as a sound basis for any future EU strategy, policy and action related to cultural heritage.

THE CONSORTIUM

Cultural Heritage Counts for Europe, a two-year project, supported by the EU Culture Programme (2007–2013), was launched in July 2013 by a consortium of six partners — Europa Nostra (acting as project coordinator), ENCATC (the European Network on Cultural Management and Cultural Policy Education), Heritage Europe (the European Association of Historic Towns and Regions), the International Cultural Centre (Krakow, Poland) and the Raymond Lemaire International Centre for Conservation at the University of Leuven (Belgium) — acting as partners, as well as The Heritage Alliance (England, UK) as associate partner.

The members of the Consortium combine the wide range of expertise needed for the effective delivery of the CHCfE project. Three members of the European Heritage Alliance 3.3, namely Europa Nostra, ENCATC and Heritage Europe, have long standing experience of close involvement in EU policy developments related to cultural heritage. They are Europe-wide networks with a large number of members represented, ranging from over 1,200 historic towns and regions (Heritage Europe), 100 educational and training bodies covering the wider field of culture and cultural heritage (ENCATC), to more than 200 civil society organisations with a largely combined membership (Europa Nostra). In addition, the Consortium has benefitted from the invaluable experience and expertise of The Heritage Alliance, a grouping of circa 100 independent heritage organisations in England, which has been actively involved over the past decade in the annual survey of the state of England's historic environment entitled “Heritage Counts”.

Finally, the research team of the Consortium is composed of representatives of two renowned international bodies, with extensive experience in heritage-related expertise and large networks of fellow researchers from Central Europe (in the case of the ICC from Krakow) as well as from Western Europe and beyond (in the case of the RLICC from Leuven). The ICC was founded in 1991 by the Polish government as a national cultural institution dedicated to interdisciplinary research, education, publishing and exhibitions. The ICC pursues its mission of public diplomacy by facilitating international cultural dialogue, taking the wider concept of “Central Europe” as the point of departure for its action and thought on heritage. Whereas, the RLICC, founded in 1976 on the initiative of ICOMOS by Professor Raymond Lemaire, offers an advanced master's programme in conservation through the Faculty of Engineering of the University of Leuven. The RLICC has 40 years of experience in interdisciplinary training, research and consulting in preservation of built heritage throughout Europe and worldwide. Both institutions have cooperated regularly with the European Union, Council of Europe and UNESCO.

THE EVIDENCE

THE SCOPE AND SCALE OF THE SURVEY

The CHCfE survey was conducted and its results were analysed during 2014 by the International Cultural Centre and the Raymond Lemaire International Centre for Conservation, with the support of the Steering Committee composed of representatives of all six project partners. The collection of evidence-based research was carried out through the extensive networks of the Consortium's partners and also through the networks of other members of the European Heritage Alliance 3.3 who were involved where appropriate in the different phases of the CHCfE project.

While endorsing the Faro Convention's broad and dynamic definition of cultural heritage, the CHCfE project focuses on tangible and immovable heritage. However, as demonstrated in this report, the project does not limit its focus exclusively to individual physical properties but covers also movable assets and intangible aspects of heritage provided that they have a clear connection with tangible and immovable heritage assets [↻](#) (cf. [Network of European Museum Organisations, 2015](#)).

The CHCfE survey focused on cultural heritage research where the used methodologies included evaluation of impact and clear evidence, but necessarily excluded many projects that did not assess outcomes in this way. The conducted survey also cannot claim to have necessarily identified all research ever carried out in this field; that would have been unrealistic given the constraints of time, resources, and accessibility. Nor was it possible within these constraints to comprehensively evaluate and extract statistical data collected at the European and national levels given the differing methodologies and definitions of what constitutes cultural heritage.

However, the project identified a large number of significant studies dealing with the impact of cultural heritage and organised the research output into three levels of analysis: macro, meso, and micro. In the macro level of the report (ca 140 studies reviewed), a theoretical framework was established which allows the data to be understood within a broader global perspective. This level, therefore, covers a review of theoretical literature on heritage impact as well as on indicators (both qualitative and quantitative) employed to measure this impact in Europe and in the rest of the world. The meso level entails an analysis of the research that has been done across the European Union (with 221 studies selected for further analysis) demonstrating the wide-ranging impacts of cultural heritage at local, regional, national, and European levels. Finally, the research was completed at the micro level with case studies which provide

real-life evidence that heritage has an impact in one or more of the four domains: economic, social, cultural, and environmental, including a representative sample of exemplary projects which have received an EU Prize for Cultural Heritage/Europa Nostra Awards.

GROWING INTEREST IN CULTURAL HERITAGE IMPACT RESEARCH

The number and type of collected studies reveal the chronological development and increasing interest in cultural heritage impact studies throughout the European Union, as indicated in Figure A. The rate of growth is notable generally and is particularly significant in the case of economic-led studies. While economic studies still predominate, the number of those devoted to social and cultural impacts increased from the 1990s onwards. Environmental impact studies, being a new field of research, are still relatively under-represented.

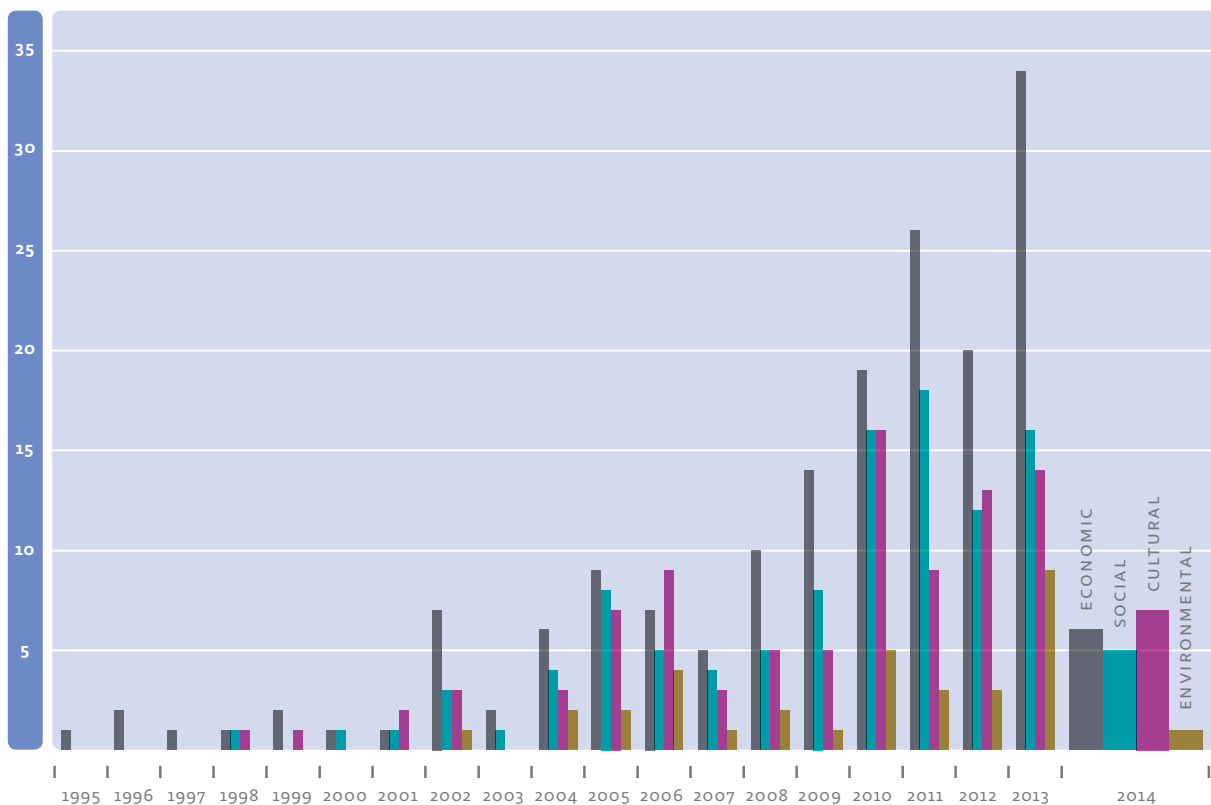


FIGURE A. CHRONOLOGICAL EVOLUTION OF THE IMPACT DOMAINS AS REPRESENTED BY THE SUBMITTED STUDIES

SOURCE: own, based on the survey results.

GEOGRAPHICAL SPREAD OF CULTURAL HERITAGE IMPACT RESEARCH

The survey, which aimed to cover all the EU member states, revealed — perhaps not surprisingly — uneven numbers of conducted studies across the European Union. Particularly, it shows a significant difference in the scope of research and number of studies between the countries that joined the EU before 2004 and those who joined the EU in 2004 and later, with the latter demonstrating a smaller number of available impact studies and research.

For the EU member states from Central and Eastern Europe, history of over 40 years under a command economy still influences the way decision makers think about and manage cultural heritage. Although in some countries there is an evidence of a change in approach towards the assessment of the socio-political impact of cultural heritage (supported, in some cases, by the EU programmes), other countries are still in the difficult process of transition. In the context of preservation of cultural heritage, some of them face the challenge of rapid privatisation as well as a significant conservation deficit caused by a long-standing lack of maintenance and a weak culture of stewardship, while the demands of tourism add significant pressures.

Yet, however uneven the distribution, it is clear that there is significant academic and professional expertise across the European Union (and beyond) that could be shared more effectively to support data collection and develop research methodologies and assessment of findings.

TOWARDS A HOLISTIC APPROACH TO CULTURAL HERITAGE IMPACT RESEARCH

The extensive in-depth evaluation of research carried at the European level clearly indicated — as shown in Figure B — that only 6% of all identified studies were conceived as holistic studies covering all four domains. However, the range of the studies and combinations of fields examined by them demonstrate the ways in which cultural heritage impacts on economic, social, cultural, and environmental domains.

This led to a “mapping” of these studies, summarized in the conceptual diagram (Figure C), which underlines the potential of cultural heritage as a key driver of sustainable development across a wide range of policy areas.

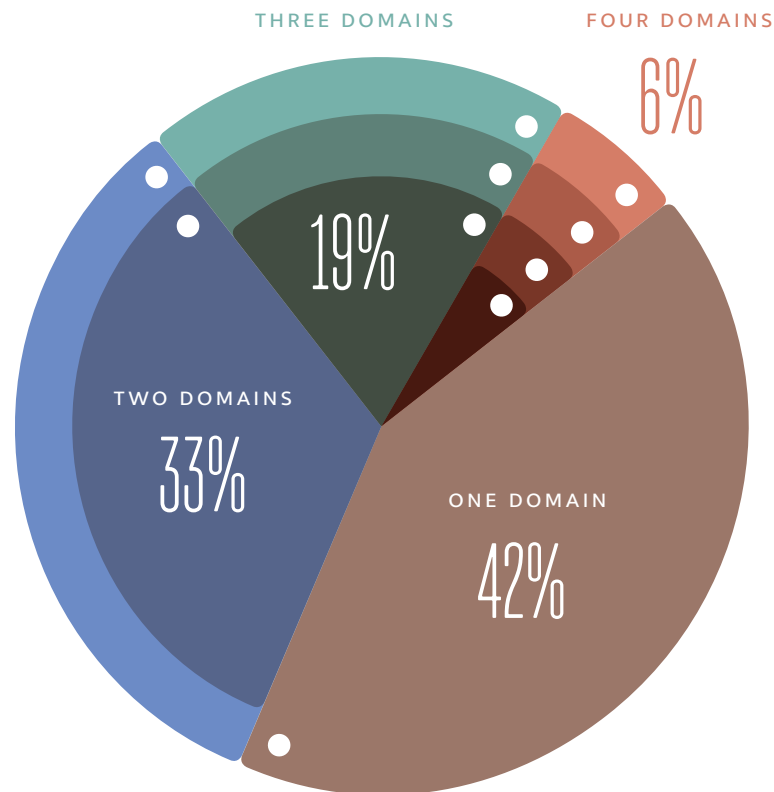
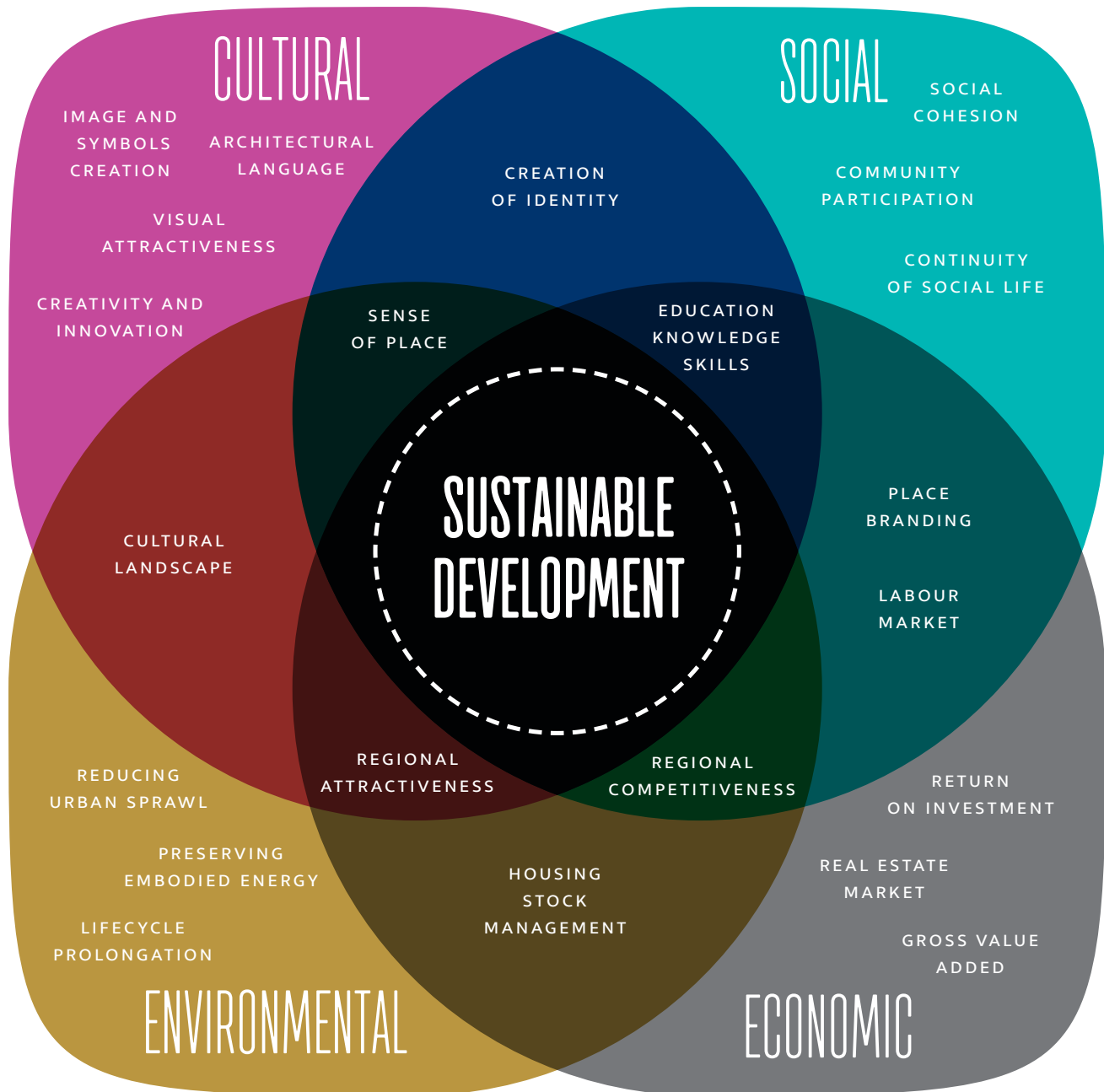


FIGURE B. THE INTERRELATION OF ALL FOUR IMPACT DOMAINS AS IDENTIFIED IN THE COLLECTED STUDIES

SOURCE: own, based on the survey results.

The evidence presented in the report suggests that safeguarding cultural heritage works as a “multiplier” through which investment can have positive impacts beyond that initially intended, thereby increasing the level of benefit and sustainability of the initial investment.

Moreover, the analysis conducted within the CHCfE project shows — as explained in more detail in the conclusions of this report — that potential future investment in cultural heritage from the mainstream policy stakeholders (e.g. job creation programmes, social enterprise investment, environmental services) can be seen in terms of “upstream investment” which has the potential to deliver significant “downstream benefits” as illustrated in Figure C. This can be seen in a comparison with often unplanned but beneficial impacts of upstream investment in preventive medicine, for example healthier lifestyles, which reduce the downstream costs of treating illness and disease. Therefore, the analysis conducted within the CHCfE project flags up the need to raise awareness — both within the cultural heritage sector and the wider policy areas concerned — of the opportunities inherent in this approach and the wider benefits that can be delivered.



❖ **FIGURE C.** THE DIFFERENT SUBDOMAINS IDENTIFIED IN THE COLLECTED STUDIES MAPPED IN THE HOLISTIC FOUR DOMAIN APPROACH DIAGRAM

SOURCE: OWN.

Finally, this analysis provides a key impetus to encourage and ensure that cultural heritage-related research broadens its horizons and embraces a more holistic approach to future research on cultural heritage impact. Such a holistic approach to impact assessment will be essential to support the delivery of an “integrated policy approach to heritage” in the European Union and guarantee that the multiple benefits of cultural heritage are realised in practice.



📍 **Zsolnay Cultural Quarter**

created during the European Capital of Culture project in Pécs, Hungary in 2010. Now one of the main sites impacting the city's attractiveness and brand.

THE 10 KEY FINDINGS

The CHCFE project provides a comprehensive overview of the evidence which clearly demonstrates the wide-ranging benefits of investing in Europe’s cultural heritage. The report references and summarises numerous studies with relevant data and examples that show not only the wide range of cultural heritage benefits but also in some cases its adverse impact. (p. 54) →

The 10 key findings of the project are summarised below with selected examples of supporting evidence.

1 Cultural heritage is a key component and contributor to the attractiveness of Europe’s regions, cities, towns and rural areas in terms of private sector inward investment, developing cultural creative quarters and attracting talents and footloose businesses — thereby enhancing regional competitiveness both within Europe and globally.

EXAMPLE

The **ZSOLNAY CULTURAL QUARTER IN PÉCS (HUNGARY)** has been the central element of the regeneration project of Pécs — European Capital of Culture 2010. It involved one of the largest brownfield cultural investments in Central Europe, following closure of the coal and uranium mines that had generated the city’s main revenue. (pp. 118-119) →

EXAMPLE

The **MOTOR VALLEY CLUSTER NEAR MODENA (ITALY)** demonstrates how the motor sport industry and heritage may enhance regional identity and create a new form of cultural cluster. It gathered motor industry companies, museums and archives, artisan and tourist organisations and sports facilities that together fostered the increase of tourism in the region. (p. 163) →

📍 **Museo Ferrari,**
part of the multi-sector
and multidisciplinary Motor
Valley Cluster that fosters the
competitiveness of the Emilia
Romagna region, Italy.

PHOTO CREDIT:
Turismo Emilia Romagna
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EXAMPLE

Cultural heritage, including post-industrial heritage, is frequently a basis for developing cultural creative quarters, for example the **CREATIVE INDUSTRIES QUARTER IN SHEFFIELD (UK)** and the **TEMPLE BAR IN DUBLIN (IRELAND)**. Degraded districts with rundown buildings, often significant in their design, are visually appealing in terms of ambience and a unique spirit of place and attract various social groups, cultural entrepreneurs and start-up companies (more often than not from the creative sector) looking for favourable conditions for renting space. Regeneration of cultural heritage strengthens the cultural value of the area, plays a vital role in raising the attractiveness of the place as well as contributes to its economic prosperity. (p. 175) →

📍 **Temple Bar,**

Dublin's cultural and creative quarter regenerating the area with cultural events, craftsmanship, monuments, shops and nightlife.

PHOTO: Jim Nix
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**EXAMPLE**

Studies on **DUBLIN** and its “talent hub” strategy based on the livability of the historic city core showed that differentiating the city by way of its cultural and heritage assets and ensuring their authenticity contributed to attracting a young and creative class as well as their potential employers. (p. 162) →

2 Cultural heritage provides European countries and regions with a unique identity that creates compelling city narratives providing the basis for effective marketing strategies aimed at developing cultural tourism and attracting investment.

EXAMPLE

Whilst the primary purpose of the **UNESCO WORLD HERITAGE LIST** is to promote understanding and management of sites with outstanding universal heritage values, inclusion in the list is widely recognised as a brand that acts as a powerful marketing tool. Research on a cross-section of 878 World Heritage Sites identifies twelve key areas in which those sites have socio-economic influence with evidence of impacts including tourism development and inward investment. (pp. 126-127) →

EXAMPLE More generally, investment decisions are mostly taken on grounds of availability of resources in a given location, access to market, potential clients, and costs. The studies analysed in this report indicate that heritage has become part of the city narrative and its brand. The atmosphere of a historic city or even a single historic building conveys the message of long-term credibility, reliability, probity and, in many cases, prestige. (p. 161) →

EXAMPLE Research conducted in **HAMBURG (GERMANY)** proves, for example, that heritage-related locations, such as commercially occupied listed buildings, tend to be treated as prestigious business locations. The studies show that 87% of employees felt that there was a better work atmosphere after moving to a historic building with 73% of clients also indicating a positive reaction. Cultural heritage is a factor in choosing a site for a new investment, especially for IT businesses and those which hire highly qualified staff. (pp. 161-162) →

— **3 Cultural heritage is a significant creator of jobs across Europe, covering a wide range of types of job and skill levels: from conservation-related construction, repair and maintenance through cultural tourism, to small and medium-sized enterprises (SMEs) and start-ups, often in the creative industries.**

EXAMPLE Cultural heritage sector is estimated to produce up to 26.7 indirect jobs for each direct job, much more than, for example, the car industry with a quotient of only 6.3. (p. 154) →

EXAMPLE The number of persons directly employed within Europe in the cultural heritage sector is estimated at over 300,000 but the potential of cultural heritage lies also in inducing job creation in other sectors — indirectly created jobs amount to 7.8 million person-years. (pp. 153-154) →

EXAMPLE The World Bank study (2001) indicates that for every 1 million USD invested in building rehabilitation 31.3 jobs are created, whereas the same amount invested in manufacturing industries brings only 21.3 positions to the labour market. (p. 155) →

EXAMPLE **TATE MODERN IN LONDON (UK)** shows the role industrial heritage can play in transforming whole neighbourhoods. Within only one year, it became the third most visited tourist attraction in the UK and the anchor attraction on the South Bank of London, drawing attention and people to a previously undiscovered and undeveloped area. Between 2,100—3,900 new jobs were created overall in construction, management of the centre as well as in catering and hotels — with £75—£140 million generated within the wider economy of which £50—£70 million was attributed to the impact of Tate Modern itself. (pp. 159-160) →





📍 Tate Modern

located in an adapted power plant building in London with a potential economic impact of between 75 million GBP and 140 million GBP generated in the wider economy and 2,100-3,900 jobs created.

PHOTO: Jim Bowen
cc by 2.0

📍 Tate Modern interior.

Entrance area to the museum and Turbine Hall, a display space for large-scale sculptures and installations.

PHOTO CREDIT: Nick Garrod
CC BY-NC-ND 2.0



4 Cultural heritage is an important source of creativity and innovation, generating new ideas and solutions to problems, and creating innovative services — ranging from digitisation of cultural assets to exploiting the cutting-edge virtual reality technologies — with the aim of interpreting historic environments and buildings and making them accessible to citizens and visitors.

EXAMPLE As shown in the results of the **EPOCH PROJECT**, cultural heritage may stimulate ICT innovation related both to the digitalisation of heritage resources and the need to present them to a wider public using virtual technology. Creating new products and services requires an increased number of high-quality jobs — both in the supply and on the demand side. (p. 175) →

EXAMPLE Cultural heritage can also be a source of innovation itself, generating new ideas and solutions, as depicted in an example of ablative laser technological system developed in **FLORENCE CREATIVE CLUSTER (ITALY)** to clean and protect works of art. (p. 175) →

5 Cultural heritage has a track record on providing a good return on investment and is a significant generator of tax revenue for public authorities both from the economic activities of heritage-related sectors and indirectly through spillover from heritage-oriented projects leading to further investment.

EXAMPLE **AN ENGLISH HERITAGE (UK)** commissioned analysis (covering over a million transactions on the real estate market in the period 1995–2010) of the costs and benefits of properties within or near to a conservation area shows increase in property values of circa 23%. (p. 132-133) Increased return on investment is also shown by research conducted in **BERLIN (GERMANY)** where the external heritage effect embedded in property values in Berlin amounts to as much as 1.4 billion EUR. (p. 132) →

EXAMPLE The **BORGUND STAVE CHURCH (NORWAY)** generates, based on the tax income alone, 628.5% of return on the yearly investment — with maintenance costs of the church estimated at approximately 2 million NOK (about 245,523 EUR) per year with the income from tickets reaching 1.75 million NOK. The study estimates that the church as the main attraction in the region generates some 11 million NOK of income taxes per year. (p. 164) →

EXAMPLE L'Établissement public de coopération culturelle (L'EPCC), the operator of the UNESCO Heritage Site of **PONT DU GARD (FRANCE)**, requires 7 million EUR yearly to maintain the site, out of which 3.4 million EUR comes from the local and regional authorities. L'EPCC earns 3.6 million EUR by providing services to the visitors (restaurants, parking, museum, souvenir shop, tickets). The indirect impact is calculated at 135 million EUR (expenditure incurred by the visitors outside the heritage site) with tax income estimated at 21.5 million EUR (pp. 164-165) →

📍 **Borgund stave church in Norway,**
with estimated 628,5%
of return on the yearly
investment and 11 million NOK
of income taxes annually.

Photo: Bob Witlox
CC BY-NC-ND 2.0



📍 **UNESCO Heritage Site
of Pont du Gard in France**

whose indirect economic
impact is calculated at 135
million EUR and tax income at
21.5 million EUR.

Photo: Tiberio Frascari
CC BY-SA 2.0



6 Cultural heritage is a catalyst for sustainable heritage-led regeneration.

EXAMPLE

Studies show that development strategies based on heritage conservation (such as the EU/Europa NOSTRA award-winning regeneration of the **GRAINGER TOWN IN NEWCASTLE UPON TYNE (ENGLAND, UK)** and initiatives related to historic urban environments of different European cities, such as **KRAKOW, LILLE, LIVERPOOL, AND MANCHESTER**), where an integrated policy approach to heritage is adopted, lead to the regeneration of the wider area. (p. 145) →

EXAMPLE

For example cultural heritage has played a key role in regenerating the **CATHEDRAL QUARTER IN BELFAST (NORTHERN IRELAND, UK)** where investments in the quarter which were not linked to the cultural heritage of the area were shown to have produced little or no effects in terms of increasing the appeal of the area for investors, whereas heritage investment, turned to be a driver for regeneration. (p. 162) →



📍 **Grainger Town**

with a strategy based on the combination of immovable heritage conservation with an urban regeneration project.

PHOTO: Kay Williams
C BY-NC-ND 2.0



📍 **Pszczyna Castle.**

Its restoration had a positive impact on the image of the town, enhanced the sense of pride of the inhabitants and their participation in culture.

PHOTO: Rafal Nalepa
CC BY-NC-ND 2.0

📍 **Jamtli indoor and open-air museum in Sweden**

created positive learning experiences for young people encouraging them to reengage in formal education.

PHOTO: Roine Johansson
CC BY-NC-ND 2.0

— **7 Cultural heritage is a part of the solution to Europe’s climate change challenges, for example through the protection and revitalisation of the huge embedded energy in the historic building stock.**

EXAMPLE Reusing and repairing existing building stock have environmental benefits with increasing evidence that the level of energy efficiency of pre-1890 public buildings at least matches, and sometimes exceeds, the one of the most sophisticated modern buildings. From an environmental standpoint, the embodied energy of existing buildings is one of the most compelling arguments for preserving them. (p. 147) →

EXAMPLE Maintaining and reusing existing structures also contribute to reducing urban sprawl, prolonging the physical service-life of buildings and building parts and supporting waste-avoidance. (p. 80) →

— **8 Cultural heritage contributes to the quality of life, providing character and ambience to neighbourhoods, towns and regions across Europe and making them popular places to live, work in and visit — attractive to residents, tourists and the representatives of creative class alike.**

EXAMPLE Research conducted by the Institute for the Urban Development in **KRAKOW (POLAND)** shows that the successful restoration of Polish historic town centres has shaped the quality of life of local inhabitants, boosted the towns’ attractiveness for tourism, as well as improved the general image of a given town. (p. 120) →

EXAMPLE The case study of the socio-economic impact of heritage in the city of **MECHELEN (BELGIUM)** demonstrates that heritage and its successful preservation are factors that contribute to the quality of life of the citizens. Heritage is identified as being highly valued in strengthening the image of the city in terms of civic pride with 84% of citizens consulted who highlighted heritage as the biggest contributor to the new image of the city. (pp. 214-215) →

EXAMPLE A study conducted across the UK showed a positive correlation between the number and nature of heritage assets in given places and their image and appeal as touristic destinations. Areas benefiting from heritage-led regeneration have strong vitality and are perceived positively by those that use them. In particular, 89% of respondents agreed or strongly agreed that investment had created an environment with an enjoyable atmosphere. 93% of interviewees stated that the investment in the historic environment had improved the image of the immediate project area and 91% of respondents said that the project had resulted in an improvement in the image of the whole town or city. (p. 125-126) →

EXAMPLE The creative class is defined in other research studies as being valuable from an economic point of view as one that attracts investors, especially within the field of new technology and innovation. Research shows that the **creative class in the Netherlands**, for example, chooses work places and places of residence

by taking into consideration aesthetic values, the presence of historic buildings and the beauty of the natural environment. (p.162) →

— **9 Cultural heritage provides an essential stimulus to education and lifelong learning, including a better understanding of history as well as feelings of civic pride and belonging, and fosters cooperation and personal development.**

EXAMPLE Heritage may encourage people who interrupted for various reasons their education to continue gaining knowledge and skills. The **JAMTLI MUSEUM IN ÖSTERSUND (SWEDEN)** — a regional museum of Jämtland and Härjedalen in Östersund — consists of an open-air museum with historical buildings and an indoor museum. In collaboration with the regional archive and the local secondary school it initiated a programme aimed at creating positive learning experiences for young people that resulted in one third re-engaging in school. (p.142) →

EXAMPLE The study on the **CASTLE MUSEUM IN PSZCZYNA (POLAND)** showed that the most common motive for a visit was the desire to spend time in pleasant surroundings but also getting to know the unknown: “Although very often [...] it is more important to rest or to enjoy oneself with family or friends, many people who visit heritage institutions leave them with a sense of having gained new knowledge, new inspirations or having been made curious.” (p.141) →

— **10 Cultural heritage combines many of the above-mentioned positive impacts to build social capital and helps deliver social cohesion in communities across Europe, providing a framework for participation and engagement as well as fostering integration.**

EXAMPLE The connection between the historic built environment and social capital occurs through an enhanced sense of place, triggered by the presence of historic buildings that provides a context in which interactions between people may arise and be strengthened. (p.171) →

EXAMPLE **HERITAGE LOTTERY FUND (UK)** research, for example, shows that participants of heritage projects improved various skills, such as research skills as well as their self-confidence and social and communication skills (through group working, presentation, listening, interviewing, observation), ICT, and technical skills. (p.137) →

EXAMPLE Cultural heritage, therefore, can be an important factor in building social capital by acting as a community hub providing opportunities for bonding and bridging between different age groups, long time and new residents, different ethnic and religious groups — both in heritage sites or museums themselves and in cafes or shops located on the premises. Volunteering programmes provided by heritage organisations can reward participants with such benefits as inter-generational contacts, face-to-face interaction, and a sense of belonging. They also positively influence mutual understanding between people. (p.177) →

THE 5 STRATEGIC RECOMMENDATIONS

The Cultural Heritage Counts for Europe project provides a “snapshot” in time of the currently available and accessible data within the EU member states on the wide-ranging impacts of cultural heritage on economy, society, culture and environment. The 10 key findings of this project present an inspirational and compelling story that confirms — if confirmation is needed — that cultural heritage counts for Europe.

The project findings underpin the policy direction the European Union has embarked on, demonstrating clearly the potential of cultural heritage as a strategic resource for creating a more sustainable and a more prosperous Europe. However, they also show that there are no grounds for complacency: the research base to ensure effective decision-making and policy development is still incomplete and in radical need for investment if the proclaimed goal of an integrated policy approach to cultural heritage is to be achieved.

On the basis of the evidence gathered through the CHCfE project, the CHCfE Consortium presents the following 5 strategic recommendations:

① SUPPORTING EVIDENCE-BASED POLICY MAKING

Within the framework of the on-going EU initiatives on cultural statistics, the EU institutions and member states should:

- adhere to and promote a holistic approach to collecting, managing and interpreting data, both quantitative and qualitative, which can demonstrate the impact of heritage on Europe’s economy, society, culture, and environment;
- make use of the framework provided by this project to identify, define and categorise heritage impact indicators;
- support proper training of practitioners who are responsible for conducting heritage impact assessments and providing cultural (heritage) statistics.

② MEASURING IMPACT

The EU institutions could play a key role in ensuring that cultural heritage impact is measured in a more systematic and holistic way by all relevant stakeholders and operators by:

- identifying and disseminating good practice;
- introducing a requirement for projects which are recipients of EU funds to conduct a holistic impact assessment, measuring both short- and long-term impacts.

③ MONITORING TRENDS

The European Commission should actively help monitor trends related to cultural heritage over a longer period of time in order to inform policy makers at all levels. Any future monitoring mechanisms (possibly in the form of an Observatory) should collect and disseminate studies undertaken in various EU member states. They should also compile and publish regular EU reports on the condition of heritage assets, as well as on the pressures and participation levels related to cultural heritage. These reports should address the key gaps in our knowledge by theme as well as by region.

④ SHARING AND DISSEMINATING DATA

As continuous data collection and mapping is crucial to making informed policy choices for the future, the CHCfE Consortium stresses that:

- the evidence collected through this project should be made widely and freely accessible to all interested parties;
- the survey carried out by this project should remain open-source and capable of being expanded in scope and content;
- regional and local authorities in particular should be encouraged to make use of this project's findings as a capacity building tool and guide to good practice.

⑤ MAXIMISING IMPACT

Consistent with the most recent policy documents adopted at an European level by the EU Council of Ministers and the European Commission and in line with the evidence collected, the CHCfE Consortium stresses the importance of maximising cross-sectorial impacts of cultural heritage in the following ways:

- EU institutions and member states at all levels of governance — national, regional, and local — should adopt and implement an integrated approach to heritage. In other words, they should ensure the mainstreaming of heritage by:
 - integrating the care, protection and proper use of heritage in all related policies, programmes and actions,
 - raising awareness of the downstream benefits that upstream investment in cultural heritage can bring across a wide range of policy areas.
- Participatory governance needs to be reinforced through the structured and systematic inclusion of all stakeholders and civil society in developing strategies and policies for cultural heritage.
- Special focus and recognition should be given to the positive contribution of heritage to regional and local sustainable development — as a strategic resource for “smart, sustainable and inclusive growth” and as a basis for fostering “inclusive, innovative and reflective societies” — in the context of the mid-term review of the Structural Funds (in 2016–2017) and the preparation for the next generation of Structural Funds beyond 2020.

The word "REPORT" is written in a bold, green, sans-serif font. A blue circle is superimposed over the letters "E", "P", and "O". A white arrow points from the "E" to the "P", and another white arrow points from the "P" to the "O".

REPORT



1 INTRO

1 INTRODUCTION

1.1 BACKGROUND OF THE PROJECT

Cultural heritage is central to European identity. It is an undisputable asset of cities, regions and countries whose historical and spiritual value is impossible to express in monetary terms. There is a growing acknowledgement that cultural heritage contributes to various spheres of life — economy, social issues, culture and environment. However, as identified by the European Heritage Alliance 3.3 (a policy grouping composed of 32 European and international networks active in the field of cultural heritage), there is lack of comprehensive and readily available evidence for the benefits of cultural heritage on a European level.

Many studies and projects have been identified, prepared both by and for the academic world, central and regional authorities as well as non-governmental bodies, that present various aspects of the importance of heritage and its influences over the socio-economic context within which it is located. Many of these, however, deal with only selected aspects of the potential impact of cultural heritage. Moreover, close examination of these studies shows that some are based on anecdotal evidence and tend to include dogmatic statements about the importance of heritage that are not always supported by clear evidence or in-depth analysis.

What is absent is a readily accessible and comprehensible overview of the value and relevance of heritage on the European level which would form a credible basis for policy development that is statistically valid and reflects all aspects of the subject. The purpose behind the Cultural Heritage Counts for Europe (CHCfE) project is to begin to address this need by assessing the evidence currently available in existing research and identifying gaps that need to be evaluated in the future. Such an overview is seen as an indispensable starting point for developing an EU strategy for cultural and natural heritage — a strategy that values heritage as a crucial asset and resource and takes full advantage of its potential for the benefit of the European citizens.

1.2 WHAT DO WE MEAN BY CULTURAL HERITAGE?

The notion of heritage was conceived relatively recently in the second half of the 20th century. Earlier signs of conscious respect for the past may be linked with the 18th century emergence of archaeology and art history as fields of science, and subsequently the development of cultural tourism, fashion for antiquarianism, and in the 19th century, with the modern conservation and preservation of historic monuments.

According to contemporary research, heritage consists of a wide and diversified array of past events, personalities, folk memory, mythology, literary associations, physical relics of the past, as well as places to which they can be symbolically linked (Ashworth, et al., 2007, pp. 3, 35, 40). This is why the understanding of heritage is dynamic in nature, being constantly interpreted and changed depending on the passage of time, the change of context, and the public's experiences and expectations. Heritage does not belong to any given group, but it is open — it belongs to all those who wish to identify with it.

“Monument” is a notion similar to that of heritage and is often confused with it. Its definition developed by UNESCO (UNESCO, 1972) clearly shows that it constitutes a part of material heritage; therefore, its reference is narrower than that of heritage. Ashworth (Ashworth, 2002) juxtaposed the notions of heritage and monument protection to indicate the differences between them. In his view, monument protection aims to discover and preserve all that can be preserved (forever), while heritage is limited to the contemporary consumption of the past (it undergoes selection and changes — what is rejected in the present may be considered valuable in the future and vice versa). Permanent, finite and exhaustible resources are being protected, while heritage resources constitute a result of demand — they are infinite and inexhaustible (limited only by imagination). Protection entails the existence of a permanent and universal meaning of the object, whereas heritage accepts changeable meanings dependent on the user. Heritage refers to particular objects; it is linked to the symbolic content that they produce and embraces their non-material dimension. It also constitutes a market product that responds to social needs.

The CHCfE project is based on this dynamic definition of heritage being the past used for both present and potential future purposes. It is this approach to heritage that provides the *raison d'être* of the project and underpins its aim to demonstrate the economic, social, cultural and environmental benefits of cultural heritage to Europe and its citizens. In the CHCfE project heritage focuses on tangible and immovable heritage. It is, however, important to remain aware of the fact that the concept of cultural heritage is inclusive and implies more than only the material aspect. The definition of cultural heritage given in the European Council's Faro Convention from 2005 conceives cultural heritage as a whole i.e. does not differentiate the immovable from the movable and the

tangible from the intangible. Furthermore, the definition refers to the significance of the values of heritage for society.

Cultural heritage is a group of resources inherited from the past which people identify, independently of ownership, as a reflection and expression of their constantly evolving values, beliefs, knowledge and traditions. It includes all aspects of the environment resulting from the interaction between people and places through time (Council of Europe, 2005).

In line with this definition, this report focusses on immovable heritage, not restricting itself to the idea of individual physical properties but considering intangible aspects of heritage and society which experiences, transmits and values heritage and benefits from its socio-economic impacts.

1.3 AIMS OF THE PROJECT

The overall objective of the Cultural Heritage Counts for Europe project is twofold. On the one hand it aims at collecting and analysing evidence for the significance of cultural heritage for the European economy, society, culture and environment. On the other hand, it seeks to raise awareness of the value of cultural heritage for the development of contemporary Europe.

The goal has been detailed into specific objectives:

- to raise the profile and understanding of the importance of cultural heritage for the economy and society;
- to create a network of expertise on these issues which can be mobilised throughout Europe;
- to strengthen the co-operation and networking capacities of the full range of organisations involved in the conservation of cultural heritage;
- to foster communication and partnership between professionals at all levels, including local, national and European authorities and municipalities, educational institutions and heritage organisations;
- to create a comprehensive and readily accessible set of data on the multiple benefits of cultural heritage that will provide the arguments to convince policy-makers of the need to develop a true EU strategy for cultural heritage;
- to identify gaps in information and areas of possible future research;
- to develop recommendations on how data collection can be managed into the future so that trends can be established, indicators updated annually and change measured over time;
- to develop a series of policy recommendations for tapping into the full potential of cultural heritage.

This report aims to demonstrate how the potential of cultural heritage can impact various aspects of life with real life examples in Europe. Moreover, the intention of the project is to present conclusive and persuasive arguments for convincing policy- and decision-makers of the impact of cultural heritage and the multiple benefits of investing in it. In order to achieve this goal, a broad mapping procedure was implemented to collect evidence-based research, conducted in Europe, on the various areas of impact of cultural heritage.

The research encompasses studies conducted throughout the European Union member states. The different historical experience of individual European countries has, however, resulted in differing attitudes towards the evaluation of cultural heritage in Western and Central European countries. The term “Central Europe” is used here and elsewhere in this report very broadly, to refer to the “new” EU member states formerly within the “Eastern Block”.

1.4 STRUCTURE OF THE REPORT

The report consists of several levels of research findings reflecting the different types of documentation and evidence available. It starts with the macro level (Chapter 2), in which a theoretical framework is established allowing the data to be placed in a broader, global, perspective. It, therefore, covers a review of international theoretic literature on heritage impact and indicators (both qualitative and quantitative) employed to measure this impact. This is followed by the meso level (Chapter 3), which is the main research part and aims to map studies on the impact of cultural heritage in the EU member states. These studies include documents, research articles published in academic journals, reports from research projects and academic book publications. The report is completed with the micro level (Annex) which contains two case studies discussing in detail examples where heritage succeeded to have an impact in the economic, social, cultural and/or environmental domain and an analysis of the impact assessments done by the winners of the EU Prize for Cultural Heritage/ Europa Nostra Awards.

1.5 PREVIOUS INITIATIVES

In the preliminary phase of the project several initiatives were identified with a similar purpose to this report. They include:

- *Impact Evaluation of Museums, Archives and Libraries: Available Evidence Project* (Wavell, et al.) prepared in 2002 at the Robert Gordon University in Aberdeen. It includes an analysis of texts from the UK about the impact of museums, archives and libraries.

- *Economics and Historic Preservation: A Guide and Review of the Literature* by Mason (2005). This paper reviews the available research on the economic value of historic preservation and provides an overview of the methods applied to assess this value.
- *The Economic, Social and Environmental Benefits of Heritage Conservation: An Annotated Bibliography* by Harel. It provides an overview of impacts of heritage conservation and was prepared for the Heritage Resources Branch of Saskatchewan Culture, Youth and Recreation of Canada (2006).
- *The Costs and Benefits of UK World Heritage Site Status: A Literature Review for the Department for Culture, Media and Sport* prepared by PriceWaterhouseCoopers (2007).
- *The Social and Economic Value of Cultural Heritage: Literature Review* by Dümcke and Gnedovsky made for the European Expert Network on Culture (Dümcke & Gnedovsky, 2013). This document aims to present a broad and diverse list of documents. It summarises altogether 87 texts written in Europe about the impact of heritage on society and economy.

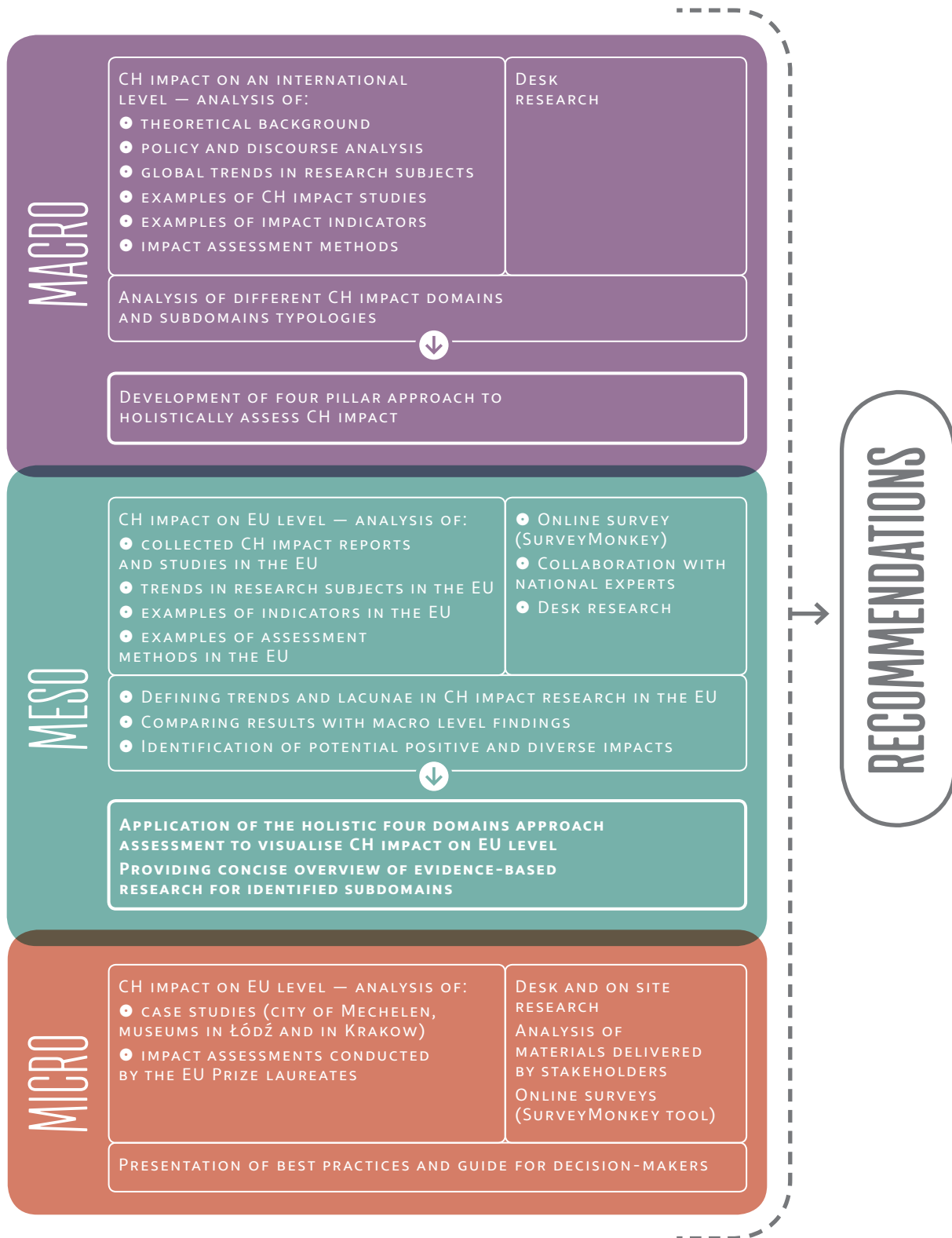
All these reports, whilst very helpful, were based on approaches with similar but different aims to those set up for this project. Firstly, many of them were limited to only listing some of the available research without a detailed analysis of the content and their meaning for policy development. Second, in many cases they deal with only some aspects of impact (usually economic and social) or cover only a limited geographic area of research. As some of them were commissioned by specific bodies, the focus of their approach reflected the purposes of the commissioning institution.

The aim of this report, however, is not only to map existing evidence for cultural heritage impact on various aspects of people's lives in the EU as a whole but to also analyse the findings of the collected studies and structure them into a credible overview of cultural heritage benefits. Last but not least, the CHCfE report's purpose is to identify the gaps in the existing research on heritage impact and to provide recommendations for further investigation. Taken together, the overarching purpose of the report is to inform and influence decision makers to ensure that the important contribution of cultural heritage to Europe is fully reflected in European strategies and policies at all levels.

1.6

OVERVIEW OF THE METHODOLOGY

The research was conducted by two teams: the Raymond Lemaire International Centre for Conservation in Leuven, Belgium and the International Cultural Centre in Krakow, Poland. Figure 1.1 presents the overview of the methodology implemented by the teams.



🔗 **FIGURE 1.1.** OVERVIEW OF THE PROJECT METHODOLOGY

SOURCE: OWN.

MACRO LEVEL

In the first stage of research (the so-called macro level), worldwide literature on the potential impact of cultural heritage (CH) was collected and analysed. The aim was to identify the current trends and findings in the field, in order to construct a theoretical framework for further work.

MESO LEVEL

Next, the European level was analysed (the so-called meso level), which constituted the major part of the work. Literature from the European level was collected in three ways: by using an online survey, by collaborating with experts (this method was used mainly to collect Central European evidence), and by desk research.

The online survey was based on a questionnaire of 24 questions, asking for specific information on the content, scale, and methodology of impact research in each particular case. It required to provide bibliographic information of each given study, location of the research, definition of the category of cultural heritage (either immovable or cultural heritage in general), information on impact domains and subdomains, methodologies and indicators used to assess the impact, as well as a short summary of the arguments developed in the respective study. Preparation of the questionnaire was preceded by an analysis of the macro level findings and translating them into a scheme of data collection on the European level. The tool used for gathering this data was an online survey provided by SurveyMonkey (a development cloud-based company that supplies customisable online surveys). The main reason behind this choice was the tool's capacity to conduct ad hoc data analysis, sample selection and bias elimination. The tool allowed the researchers to interrogate the complete set of collected data, which facilitated the proposed analysis and provided the possibility to set up a digital database of the collected European studies dealing with the impact of immovable heritage. Representatives of institutions working in the field of culture and heritage, academics and organisations' employees were encouraged to fill in the online questionnaire. The survey was set up in December 2013 and was open for uploading studies since that time until September 2014.

In order to cover Central Europe, a region of great language diversity and less experience in conducting impact studies, the second method of collecting data was employed, namely collaboration with national experts. The cooperation was established with scholars specialised in various aspects of research on cultural heritage management, whose role was to search for texts in their native language and insert them in an English language survey form with sections analogous to the ones in the online questionnaire available via SurveyMonkey. These forms were then studied by the ICC, and the ones relevant to the project were uploaded in SurveyMonkey. On October 17, 2014, a "Central European Round Table on Cultural Heritage" was held in Krakow, where experts from the region and colleagues from Western Europe had the chance to discuss, analyse, compare and contrast as well as verify the findings.

The next stage of the meso level was the analysis of the material uploaded in the online survey and found via desk research. During this phase, the RLICC focused mainly on the social and the environmental impacts, whilst the ICC's principal focus was the analysis of the economic and the cultural impacts of cultural heritage. The main aim of this work was to identify subdomains of cultural heritage impact on the European level and provide research-based evidence of that impact for each of the subdomains. To illustrate the impact of cultural heritage, a holistic four domains approach, based on the Hangzhou Declaration, was used. Due to the interrelated nature of many of the domains and subdomains, researchers of both teams collaborated to ensure descriptions of the subdomains were consistent throughout the study.

— MICRO LEVEL

The final phase of analysing evidence for cultural heritage impact was to provide case studies that would illustrate possible approaches to assessing the impact of cultural heritage. In the end it was decided to choose case studies from countries where the research project teams' home institutions were based.

The RLICC chose Mechelen as a case study, a city in Flanders characterised by its outstanding cultural heritage.

The Polish team selected the renovation and modernisation of the Gallery of Polish 19th-Century Art (a branch of the National Museum in Krakow, modernised in 2008–2010) and the conversion of the 19th century factory building for Muzeum Sztuki in Łódź — a new venue of the Museum of Art.

As a third and final case study, it was decided to include an analysis of the winners of the EU Prize for Cultural Heritage/Europa Nostra Awards and their approach towards assessing the impact of their projects. ⊗





📍 **Beautifully renovated
Grand Hall of the Liszt
Academy of Music
in Budapest.**

2015 Winner of a EU Prize
for Cultural Heritage/
Europa Nostra Award
(Conservation).

PHOTO: Rudolf Klein





MACRO LEVEL

2

MACRO LEVEL. CULTURAL HERITAGE IMPACT: THEORY AND DISCOURSE ANALYSIS

2.1

INTRODUCTION

This chapter provides a theoretical overview of the available literature on cultural heritage, both at the European level and internationally, identifying key trends in the theory and discourse that have emerged in this field of research. The opportunity is also taken here to examine cultural heritage definitions and concepts as well as the range of methodologies available to assess the impact of cultural heritage economically, socially, environmentally and culturally.

Although the idea of assessing the impact of cultural heritage is relatively recent, the concept itself is related closely to the timeless elements of “values and valuing”. The notion of values has always been the rationale underlying heritage maintenance and conservation. Therefore, efforts to conserve something will only be made when some value is attributed to it. De la Torre and Mason argue that, although tradition has always been appreciated, the current interest in heritage values is caused by the democratisation of heritage and its growing importance in today’s society (2002). Others suggest that a permanent scarcity of funds for heritage management and conservation is now becoming increasingly urgent. Consequently, policy makers seek for (or, the heritage sector argues for) justification for allocating funds to heritage by attributing socio-economic values to it and by measuring its socio-economic impact. Indeed, the costs of heritage are an obvious burden for governmental budgets, whereas the benefits of its maintaining are often intangible and difficult to capture in conventional terms (McLoughlin, et al., 2006a, p. 43).

This has led to a remarkable shift in heritage discourse in contemporary policies. It altered from a conservation-oriented (or object-oriented) approach to a value-oriented (or subject-oriented) one. More often, the value of heritage has been emphasised by arguing that it has a significant social and economic impact on society. Additionally, impact studies can enhance the significance of a heritage site in the future by pointing to advantages and shortcomings (McLoughlin, et al., 2006b, p. 18). This shift towards a more instrumental cultural policy, which justifies public expenditure for culture on the grounds of the advantages

that it brings to the nation (be they economic, social, related to urban regeneration, employment, etc.), is, according to, for example, Belfiore (2002, p. 91) and Vestheim (1994, pp. 57-71), a vital trend. Vestheim (1994, p. 65) defined this upcoming tendency of instrumental cultural policies in the 1990s as the trend “to use cultural ventures and cultural investments as a means or instrument to attain goals in other than cultural areas” such as wealth and job creation, and, more currently, social cohesion and community development. Moreover, this discourse was supported by a growing body of academic research, identified by the Cultural Heritage Counts for Europe project. In these documents, most attention tends to be attributed to the economic value of heritage. This perspective, however, evoked criticism in the heritage sector, since economic rhetoric alone can undermine the cultural and social rationale for heritage management and preservation. As a consequence, a new phase has begun to assert itself: today, the societal function of cultural heritage is also increasingly emphasised. Culture has the power to connect people and become a strategic tool for the safeguarding of the identity and the authenticity of places and local communities. The pursuit of an inclusive society is an objective to which heritage can contribute. A closer integration of economic and social values of heritage for sustainable growth and social cohesion seems to be the goal. Heritage becomes a source of democracy and well-being (Lazzaretti, 2012, pp. 229-230).

2.2 CULTURAL HERITAGE – DEFINITION, AND POLICY/DISCOURSE SHIFTS

Until some decades ago, cultural heritage management had mainly concentrated on the conservation of historic buildings, archaeological sites and works of art. This perspective assumed that cultural heritage included the tangible fabric of the past. Early examples of international heritage policies and law underscore this observation. The 1954 UNESCO Convention on the Protection of Cultural Property during Armed Conflicts still used the notion of cultural property, defined as:

movable and immovable property of great importance to the cultural heritage of every people, such as monuments of architecture, art or history, whether religious or secular; archaeological sites; groups of buildings which, as a whole, are of historical or artistic interest; works of art; manuscripts, books and other objects of artistic, historic or archaeological interest; as well as scientific collections and important collections of books or archives or of reproductions of the property defined above (UNESCO, 1954)

The aim of the convention was to protect this property from physical destruction. The Venice Charter (1964) also focused on the built heritage, its cultural value (“applies not only to great works of art but also to more modest works of the past which have acquired cultural significance with the passing of time” (ICOMOS, 1964)) and its physical conservation.

Initially, international heritage policies were thus mainly oriented towards the question of what to protect and what to preserve for future generations. Such attitudes sharply contrast with current trends concerned with the development and value of cultural heritage for society. Today, heritage policies do not only focus on the preservation of the physical aspects of cultural heritage. The values attributed to the heritage and its intangible components have been increasingly considered. One can now begin to observe the introduction of a holistic approach towards heritage management (or landscape-based approach as expressed by the UNESCO Historic Urban Landscape Recommendation), taking into account preservation aspects as well as socio-economic impact, intangible features of heritage, sustainable development and environmental aspects, inclusion of different stakeholders and heritage communities, etc.

The most significant shift in heritage discourse concerns the very definition of cultural heritage. Traditionally, cultural heritage was considered as property and emerged as an object of protection. The aforementioned 1954 Hague Convention was the first international attempt to legally protect cultural property. A definition was drawn on the basis of international consensus and in the framework of the aim of the convention: preserving cultural property during armed conflicts. This definition, therefore, had to assume that cultural heritage could be endangered and destroyed during armed conflicts. Consequently, only tangible objects were conceived as such, because solely this kind of heritage might be threatened by physical destruction. Other UNESCO instruments of that time treated cultural heritage in the same way and thus as property. The UNESCO Recommendation Concerning the Preservation of Cultural Property Endangered by Public or Private Works (1968) is a case in point here: it protects cultural property, particularly immovable heritage that may be affected by building works.

Although the definition from the 1972 UNESCO World Heritage Convention applies only to immovable property, such as monuments, sites and cultural landscapes, it nevertheless reflects a move away from the conception of heritage as property alone. A collective and public interest in heritage was recognised, above private property rights and economic interests (Forrest, 2010, p. 25). A sense of obligation to preserve cultural heritage inherited from the past, whose value transcends national boundaries, emerged. The later evolution of the guidelines of the World Heritage Convention is particularly interesting. Criterion III for Outstanding Universal Value was defined as “to bear a unique or at least exceptional testimony to a civilization which has disappeared” in 1983 and in 1996 it became “to bear a unique or at least exceptional testimony to a cultural tradition or to a civilisation which is living or which has disappeared” (WHC 13/01). Thus, historicity tended not to be that important anymore and the intangible cultural heritage of living traditions was increasingly appreciated as contributing to the outstanding universal value of the World Heritage Property. Especially after the Nara Document on Authenticity (1994), this shift started to become officially established: the intangible in cultural heritage was increasingly mentioned and distinguished from the tangible. This culminated

in the adoption of the UNESCO Convention on the Safeguarding of Intangible Cultural Heritage (2003) and even more in the case of the Council of Europe Framework Convention on the Value of Cultural Heritage for Society, where the division between the tangible and the intangible was abolished and a more holistic definition proposed. We can even observe a shift towards an all-inclusive historic environment in the context of historic urban landscapes, where cultural heritage objects and experiences of intangible cultural heritage are not to be seen as separate things. This vision has been propagated by the UNESCO Historic Urban Landscape Recommendation.

Although the shift in the cultural heritage discourse from an object or conservation-oriented approach towards a subject or value-oriented one went hand in hand with the evolution towards an all-inclusive cultural heritage definition, some harbingers of a more value-oriented approach might have been observed much earlier. Already in 1915, Patrick Geddes argued in his famous book *Cities in Evolution*, in regard to cultural heritage, that “if town planning is to meet the needs of the city’s life, to aid its growth, and advance its progress, it must surely know and understand the city” (Veldpaus, et al., 2013, p. 6). However, mainly under the influence of modernism and the Congrès International d’Architecture Moderne (CIAM), development and heritage theory took separate paths. In order to encourage urban development, old neighbourhoods had to be demolished and rebuilt, and only exceptionally prestigious buildings could be spared. The preservation of cultural heritage was thus considered as opposing development. This vision was enshrined in the Athens Charters (1931 and 1933) (Veldpaus, et al., 2013, p. 7).

Nonetheless, that tendency started to alter again in the 1970s and 1980s. The 1976 UNESCO Recommendation Concerning the Safeguarding and the Contemporary Role of Historic Areas states:

— [i]n addition to this architectural survey, thorough surveys of social, economic, cultural and technical data and structures and of the wider urban regional context are necessary [...] and the reciprocal links between protected areas and surrounding zones (UNESCO, 1976).

However, these demands were still solely based on a conservation-oriented approach, since “valid safeguarding plans cannot be prepared without such analyses” (UNESCO, 1976). The UNESCO Mexico City Declaration on Cultural Policies (1982) focused on the cultural dimension of development by arguing that “balanced development can only be insured by making cultural factors an integral part of the strategies designed to achieve it” (UNESCO, 1982). Whereas in 1994, the Nara Document on Authenticity stated that “the protection and enhancement of cultural and heritage diversity in our world should be actively promoted as an essential element of human development” (UNESCO, 1996). Also the ICOMOS National Committees of the Americas Declaration of San Antonio (1996) emphasised the social value of cultural heritage and concluded that “protecting social value is complex because so many separate interest groups may be involved” (ICOMOS, 1996). Moreover, the economic values were underscored, although with a narrow focus on tourism.

During the 1990s, the word “sustainable” started to appear more often in the documents regarding cultural heritage policy and in more than half of the cases was combined with “development” (Veldpaus, et al., 2013, p. 11). Léa and Brodhag (2004) traced the origins of the concept of sustainable development in the Club of Rome in the early 1970s. In 1987, the World Commission on Environment and Development (WCED) specified sustainable development as “development that meets the needs of the present without compromising the ability of future generations to meet their own needs” (WCED, 1987, p. 43). From now on, approaches to sustainable development have mainly focused on ecological, economic, and human or social dimensions. The report of the World Commission on Culture and Development *Our Creative Diversity* (UNESCO, 1995) already referred to sustainable development. Nevertheless, according to Throsby, the report still adopts the standard interpretation of the term as related to environment or ecology, since the references to sustainability are largely confined to the chapter on environment. Throsby argues that a link between culture and sustainability is only suggested and not taken further. In his article on sustainability and culture from 1997 Throsby calls for liberation of the word “sustainable” from its environmental connotation and proposes to use it in “its substantive intrinsic sense connoting long-term self-supporting viability of any type of system.” In that sense, culture itself can be seen as sustainable (Throsby, 1997, pp. 10-11).

Today, cultural heritage is perceived particularly as an important vehicle for development, since “cultural tourism contributes to economic development,” “cultural heritage builds social cohesion,” “mobilizes communities around its care and management,” etc. (UNESCO, 2010). The Convention for the Protection and Promotion of the Diversity of Cultural Expression (adopted on 20 October 2005), that also covers cultural heritage, explicitly encourages the “integration of culture in sustainable development” (art. 13). Pyykkönen (2012, p. 555) even argues that “one might justly conclude that binding cultural expression to developing countries to the global market economy is one of the core missions.” In 2011, The Paris Declaration on Heritage as a Driver for Development was issued by ICOMOS. Similarly, UNESCO’s Historic Urban Landscape Recommendation (2012) proposes an integral approach and considers urban heritage endowed with “a social, cultural and economic value.” “The active protection of urban heritage and its sustainable management is a condition sine qua non of development,” states the recommendation, and it “fosters economic development and social cohesion in a changing global environment;” “conservation has become a strategy to achieve a balance between urban growth and quality of life on a sustainable basis.” Also interesting is the emphasis on the environment, which is rather new in heritage policies:

Concern for the environment, in particular for water and energy consumption, calls for approaches and new models for urban living... Many of these initiatives, however, should integrate natural and cultural heritage as resources for sustainable development (UNESCO, 2012).

In short, the recommendation promulgates the landscape-based approach. This is a holistic perspective which considers heritage, or the site, not as a goal in itself, but as placed in social, economic, ecological and cultural context. The recommendation establishes a management approach which leaves room for assessing vulnerability to socio-economic pressure and impact of climate change and for integrating the outcomes into a wider framework of city development. Furthermore, UNESCO participated in the “Rio+20” UN Conference on Sustainable Development in June 2012, which was mainly focused on human development. The outcome document of the conference acknowledged, among other things, the importance of investing in cultural tourism and “the need for conservation, as appropriate, of the natural and cultural heritage of human settlements, the revitalisation of historic districts, and the rehabilitation of city centres” (A/RES/66/288, par. 130-131, 134).

In May 2013, this all culminated in the Hangzhou Declaration (*Placing Culture at the Heart of Sustainable Development Policies*). This declaration proposed to consider culture as the fourth pillar of sustainable development, equal to the economic, social and environmental pillars. Regarding heritage in particular, the declaration states for instance that the “rehabilitation of cultural heritage and cultural activities should be promoted to enable affected communities to renew their identity, regain a sense of dignity and normalcy” and “inclusive economic development should also be achieved through activities focused on sustainable protecting, safeguarding and promoting heritage” (UNESCO, 2013).

Heritage policies of the Council of Europe also shifted from a conservation-oriented approach towards a value-oriented one. This new approach is enshrined in the adoption of the Framework Convention on the Value of Cultural Heritage for Society in 2005, which underlined the socio-economic value of cultural heritage. This trend was also observed in the recommendation on “reconciling heritage and modernity,” made by the Congress of Local and Regional Authorities of the Council of Europe (2006), which stated that cultural heritage contributes to: the creation of democratic society; the improvement of principles and methods for the sustainable development of local cultural and landscape resources; the promotion of integrated sustainable spatial development policies through the pooling of information and good practice at European level; and finally to more profound consideration of the social impact of cultural heritage and its citizenship role.

Although UNESCO and the Council of Europe were more prominent in the implementation of this policy/discourse shift, the European Commission did not remain silent. The London Declaration of the European Commission Conference on *Sustainable Europe’s Cultural Heritage* (2004) for instance stated:

— [c]ultural heritage plays an essential role in the global position of Europe, and in enhancing the integration process of new enlarged Europe with its complex diversity and that it has considerable impact in many areas of economic and regional development, sustainable tourism, job creation, improving skills through technological innovation, environment, social identity, education and construction (European Commission, 2004).

More recently, in May 2014, the Council of the European Union adopted *Conclusions on cultural heritage as a strategic resource for a sustainable Europe* which present a holistic approach to cultural heritage and recognise it as a resource for enhancing the social capital in Europe. Further, the *Conclusions* endorse the economic impact of cultural heritage and its possible role in achieving the Europe 2020 strategy goals for smart, sustainable and inclusive growth. Following the EU Council, the European Commission adopted in July 2014 a communication entitled *Towards an integrated approach to cultural heritage in Europe* (COM (2014) 477 final). This policy document has a similar vision and understands cultural heritage as an asset in economic growth and social cohesion. It supports Member States to utilise the different resources for cultural heritage available under EU instruments and calls for stronger cooperation at the EU level.

2.3 VALUE VERSUS IMPACT

The Cultural Heritage Counts for Europe project aims at gathering data on the meaning of cultural heritage for various domains of life. In this context the following notions, frequently used interchangeably, are employed: value, benefit, and impact. Therefore, before continuing, a short overview of the definitions of the proposed terms is necessary. The concept of “value” is defined by several authors. Mason (2002, p. 7) describes it as

— *morals, principles, or other ideas that serve as guides to action (individual and collective); and second, in reference to the qualities and characteristics seen in things, in particular the positive characteristics (actual and potential).*

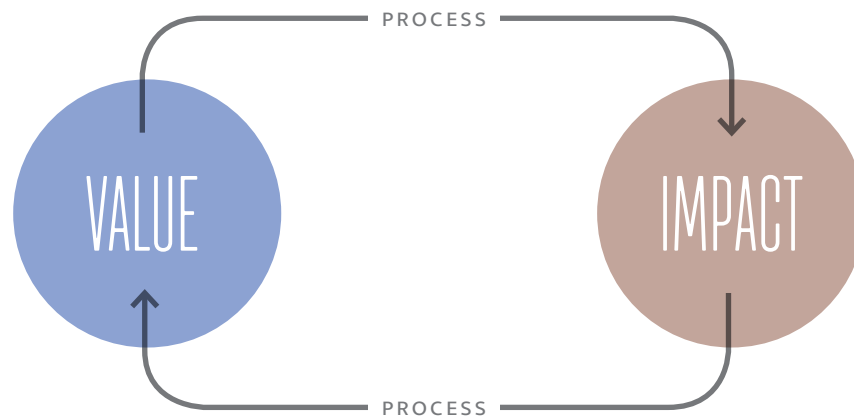
Another way of defining value is one proposed by the Institute of Field Archaeology and Atkins Heritage based in the United Kingdom (2004, pp. 13-14). The study refers to other accounts where value is considered as “an estimate or a recognition of worth” and proposes to consider value as “intrinsic worth with the potential to be realised into a benefit.” It does not handle the concept of “impact,” which tends to be understood similarly to “benefit.” For benefit, as presented by Mourato and Mazzanti (2002, p. 53), is “anything that increases human well-being.” In a way it is similar to “impact.”

While impact may be defined as

— *[a] dynamic concept which pre-supposes a relationship of cause and effect. It can be measured through the evaluation of the outcomes of particular actions, be that an initiative, a set of initiatives forming a policy or set of policies which form a strategy (Landry, et al., 1993).*

So, when put within the framework of cultural heritage, the value of heritage refers to what given sites mean to people, while the impact of heritage is their real influence on a region’s economy and society. Both terms are not predefined, but should be conceived as processes, susceptible to change. The impact of a project for example may alter as subsequent events develop. The relation between

values and impacts of heritage is twofold; values can affect impacts which in turn can lead to the elevation of the values, since an increase of heritage impact will evolve into a higher valuation of heritage. For instance, heritage is valued as a cultural asset, therefore people go and visit it, and this generates economic impact. This again can lead to a higher valuation of the good. Nevertheless, it has to be remembered that although values and benefits are increasingly attributed to cultural heritage, they must be taken (by owners, local communities, the authorities) rather than always derived only from the specific characteristics of heritage. One needs to keep in mind that, more often than not, steps need to be taken in order to trigger the impact potential of cultural heritage. According to Pendlebury et al. (2004, p. 12), cultural heritage must be considered as an opportunity space in which regeneration may occur. It may thus not be taken for granted that heritage generates impact *per se*.



❏ **FIGURE 2.1.** RELATIONSHIP BETWEEN VALUES AND IMPACTS

SOURCE: OWN.

In order to grasp all possible contexts where cultural heritage may count for Europe, this report will present both the values that society attaches to cultural heritage and the influence/impact of cultural heritage on its economic, social, cultural and environmental context. The authors quoted in this report may use terms “value” and “impact” interchangeably, however, they will not be corrected and hereinafter their ideas and conclusions will be presented as originally employed by them.

One may consider possible impacts of cultural heritage as a consequence of its diversified nature. An interesting study in this regard is the one by Bowitz and Ibenholt (2009, pp. 3-4), where they distinguish different types of impacts:

- input-output effect: products and services offered by the local economy to the heritage site, such as food supply, energy, and maintenance and which thus generate incomes for the suppliers;
- multiplier effect (Keynesian effect): effects which develop when the higher local incomes increase the demand for local goods and services and in turn increase the revenues of companies providing these goods and services;

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- acceleration effect: short-term influence (only when an investment project is being implemented) resulting from the increase of local deliveries which give rise to input-output and income multiplier effects;
- ancillary spending: visitors' spending increases income of companies providing goods and services for the visitors (accommodation, gastronomy, etc.) which in turn gives rise to second order multiplier and input-output effects;
- derived effects: existence of a cultural heritage attraction influences creation of other tourist and cultural attractions leading to ancillary spending, input-out effects and multiplier effects; derived effects may also include export of goods, services, and skills;
- gravitation: existence of cultural heritage or investing in cultural heritage makes a region more attractive for new residents (migration to the region) and investors (new firms); their arrival results in multiplier effects;
- "non-economic" effects: e.g. stronger identity for the residents;
- counteracting effects: displacement effects, wear and tear caused by visitors to the site and a rise of infrastructure costs (the need for increased infrastructure investments).

2.4 ADVERSE IMPACTS

It has to be taken into account that impacts generated by cultural heritage are not always positive. An unwanted and unanticipated result of taking a particular action in the field of cultural heritage may sometimes occur as well. Klamer and Zuidhof (1998, pp. 33-34) claim that

[economic impact] studies tend to overestimate the economic impact, since they usually leave out the negative effects of cultural projects (traffic congestion, the loss of economic value due to regulation) and, more importantly, they misstate the multiplier effect.

Usually such impact studies analyse how a euro invested in a cultural heritage project generates benefits, they rarely, however, pay attention to the fact that this euro first had been taken out someone's pocket (i.e. a taxpayer) who cannot spend it freely anymore. Another important issue here is alternative uses of this euro, which could, if spent on something else, potentially bring more benefits.

McLoughlin et al. (2006a, p. 54) point out two-faceted characteristics of some of the impacts. The impact on the quality of life might be seen from two perspectives: on the one hand, as a positive one with cultural heritage sites providing venues for the population and the increasing feeling of stability; but on the other hand, indirectly, it could feed the process of gentrification. Similarly, the cultural heritage-led regeneration of a given area might both result in clear benefits for both individuals and whole communities (e.g. new public spaces, opportunity for job creation, enhancement of local pride), but at the same time

it may cause gentrification, exclusion, and displacement of those who do not fit the new narrative. The key aspect of regeneration is to counteract continuous degradation of the space, which is based on cooperation with local communities and economic entities. This aspect distinguishes it from gentrification which also leads to desirable urban effects (regeneration of city space) and economic effects (growth of real estate prices), but not social effects (there is actually the outflow of original residents). In her publication on Krakow's district Kazimierz, Murzyn discusses several changes observed in the district, some of them having a destructive impact on local residents. She comments on conflicts that arose between different actors and their various interests:

— [among the most severe disparities is the clash between the district's purpose as an attractive place of leisure and entertainment catering to all Cracovians, visitors to the city and students, and its residential function. New functions and establishments are oriented mainly towards the external customers. The comfort, quality and level of life of the long-term residents have not improved, but in fact deteriorated (Murzyn 2006, p. 462).

Another issue, mentioned in Section 3.8.1, is that listing a building as a monument leads in many situations to an increase of the price of land and property. That can be seen as a positive impact by the owners but as a negative impact by people who rent the space or would like to buy it. It may also lead to the rise of local costs of living (e.g. prices in local shops).

Moreover, cultural heritage can play an integrating role and lead to social inclusion, but it can also cause social exclusion. For example, in some cases, cultural heritage is used in the formation process of exclusive national sentiments as it may happen before and during armed conflicts (e.g. during the Balkan wars) (Van der Auwera, 2014, p. 37). There are European countries where some of the heritage sites do not unify but repel members of the community (e.g. site of the battle of Culloden in Scotland or the Auschwitz-Birkenau concentration camp — so called dissonant heritage) (Ashworth & Turnbridge, 1996). Even the educational impact of heritage sites, whose users learn about their and others' past and tradition, can be jeopardised by the feeling of being excluded caused by the impression of elitism (McLoughlin, et al., 2006a, p. 54).

Some of the negative effects are not produced directly by cultural heritage but rather by the way it is used. This especially goes for tourism whose increase (for example as a result of a renovation project) may result in larger traffic, more noise and pollution as well as degradation of the heritage site itself, etc. Environmental impacts can be either intra-site or inter-site. The former includes the possibility of site degradation due to a large number of visitors and site congestion (reducing the quality of experiencing the heritage), while the latter deals with pollution (due to increased transport) and congestion in the locality of the site which affects the quality of life of the residents (McLoughlin, et al., 2006a, p. 56).

2.5 TOWARDS A TYPOLOGY OF IMPACT

As already mentioned, we can distinguish different impact domains and sub-domains. However, in order to map European studies on the impacts of cultural heritage, it is necessary to apply a certain typology. In the literature on the impact of cultural heritage different categorisations are used. Their variety is exemplified in Table 2.1. They mainly “describe the same pie, but slice it in subtly different ways,” as Mason states it (2002, p. 10), therefore, their analysis, comparison and aggregation might serve in creating an integrated, holistic approach towards the impact of cultural heritage for the CHCfE project.

📌 **TABLE 2.1.** AN OVERVIEW OF TYPOLOGIES OF HERITAGE VALUES/IMPACTS

AUTHOR OF A TYPOLOGY	PROPOSED TYPOLOGY OF HERITAGE VALUES/IMPACTS					
[RIEGL, 1903]	age	historical	commemorative	use	newness	
[LIPE, 1984]	economic	aesthetic	associative-symbolic	scientific	social (incl. spiritual, political, national, other cultural)	
[FREY, 1997]	monetary	option	existence	bequest	prestige	educational
[ENGLISH HERITAGE, 1997]	economic	educational and academic	resource	cultural	recreational	aesthetic
[MASON, 2002]	economic values: use values non-use values: existence option bequest			socio-cultural: historical cultural/symbolic social spiritual/religious aesthetic		
[MCCARTHY, ET AL., 2004]	instrumental effects		social effects		individual effects	intrinsic effects
[MCCLOUGHLIN, ET AL., 2006a]	economic: direct indirect induced		social: cultural identity inclusion/access education		individual: direct use indirect use non use	environmental: aesthetics pollution congestion

<p>(YUNG & CHAN, JULY 2012)</p>	<p>economical: economic viability job creation tourism cost efficiency compliance with statutory regulations</p>	<p>social and cultural: sense of place and identity continuity of social life social cohesion and inclusiveness</p>	<p>environmental and physical: environmental performance retain historical setting and patterns infrastructure townscape</p>	<p>political: community participation supportive policies transparency and accountability</p>
<p>(GIELEN, ET AL., 2014)</p>	<p>economic</p>	<p>cognitive</p>	<p>health</p>	<p>experience</p>
etc.				

SOURCE: OWN.

The overview presented in Table 2.1 is neither exhaustive nor exclusive, but it shows clearly that different authors use different typologies. Any classification of that kind could serve only as a starting point but would need to be adjusted and revised for each project and/or setting (Mason, 2002, p. 11). The approach proposed by the Cultural Heritage Counts for Europe project — that is to be presented below — despite intentions to encompass all values and impacts, might also need adjustment when used for a specific project.

2.5.1 FOUR PILLAR APPROACH

Careful examination of the various impact typologies identified, along with the evolution in policy discourse concerning the impact of cultural heritage, demonstrates that a division into the four pillars of sustainable development (as presented in the Hangzhou Declaration) serves as an appropriate base for the development of a comprehensive approach to assessing the impact of cultural heritage. The four pillars of sustainable development include the following areas of potential impact: economic, social, environmental and cultural. This classification may *grosso modo* overlap with the typologies described above and, therefore, contain all aforementioned categories.

As presented above, the literature review enabled the identification of a list of potential impact sub-domains and values associated with and derived from cultural heritage. The next step was an attempt to compare, aggregate, organise, and divide the impact subdomains and values into the four main domains of impact that make up the four pillar approach. This, however, proved to be impossible since there was considerable overlap between many of them; most sub-domains could be classified under more than one domain. For example, education is of both cultural — because heritage knowledge and values can be transmitted — and social value, as the knowledge about cultural heritage can foster identity and the feeling of belonging. Moreover, it might be treated also as holding economic value — for example conservation skills or traditional tech-

niques could be seen as a driver for local development. Table 2.2 illustrates this multidimensional approach by listing the sub-domains created by the authors of the report in the course of the literature analysis and indicating which of the four domains they belong to.

TABLE 2.2. POTENTIAL AREAS OF CULTURAL HERITAGE IMPACT

	ECONOMIC	SOCIAL	CULTURAL	ENVIRONMENTAL
IMAGE AND SYMBOLS CREATION			⊕	
VISUAL ATTRACTIVENESS			⊕	
ARCHITECTURAL LANGUAGE			⊕	
CREATIVITY AND INNOVATION			⊕	
SENSE OF PLACE		⊕	⊕	⊕
CULTURAL LANDSCAPE			⊕	⊕
REDUCING URBAN SPRAWL				⊕
PRESERVING EMBODIED ENERGY				⊕
LIFECYCLE PROLONGATION				⊕
EDUCATION	⊕	⊕	⊕	
SKILLS	⊕	⊕	⊕	
KNOWLEDGE	⊕	⊕	⊕	
CREATION OF IDENTITY		⊕	⊕	
REGIONAL ATTRACTIVENESS	⊕		⊕	⊕
SOCIAL COHESION		⊕		
COMMUNITY PARTICIPATION		⊕		
CONTINUITY OF SOCIAL LIFE		⊕		
PLACE BRANDING	⊕	⊕		

LABOUR MARKET	⊕	⊕		
REGIONAL COMPETITIVENESS	⊕	⊕		⊕
REAL ESTATE MARKET	⊕			
GROSS VALUE ADDED	⊕			
RETURN ON INVESTMENT	⊕			
TAX INCOME	⊕			
HOUSING STOCK MANAGEMENT	⊕			⊕

SOURCE: OWN.

Consequently, a corresponding diagram was developed, based on the four domains and including the different sub-domains.

As presented in Figure 2.2, there is a room left for further adjustment and additions as well as for adapting the model to individual cases. It is believed that when all values and potential impacts are taken into account, cultural heritage, if properly managed, can contribute to sustainable development. Hence, the four pillar approach as a strategy in heritage management can lead to sustainable development. It is important, however, to take also into account that heritage is largely influenced by its dynamic context. Therefore, the four pillar approach, drawing on the dynamic holistic impact framework proposed by McLoughlin, Sodogar and Kamiński (2006a), will eventually evolve into a more comprehensive model — holistic four domain approach (on the elaboration see Section 3.2.).

The authors point out the fact that the scope and level of cultural heritage impact is interdependent with its context, stakeholders, and the very nature of the body that is running a given heritage site (responsible for its management and decision making), as well as the *raison d'être* of the cultural heritage site itself. Figure 2.3 shows in more detail what is meant by each of the elements of the proposed framework. While assessing the influence of cultural heritage, it seems valuable to analyse first of all what the purpose of a given site is: how its mission and its objectives are formulated. Consequently, one must look at the stakeholders and their interest concerning the site, as well as their influence on the site. Characteristics of the body that runs the site also influence potential impacts (e.g. the way decisions are taken, what the managerial strategy is, etc.). And, last but not least, there is the macro- and microeconomic context that should be scrutinised. Having examined these four elements, one might get a clearer picture of the impact of cultural heritage in a given case, its potential, positive and negative aspects as well as reasons behind specific outcomes.

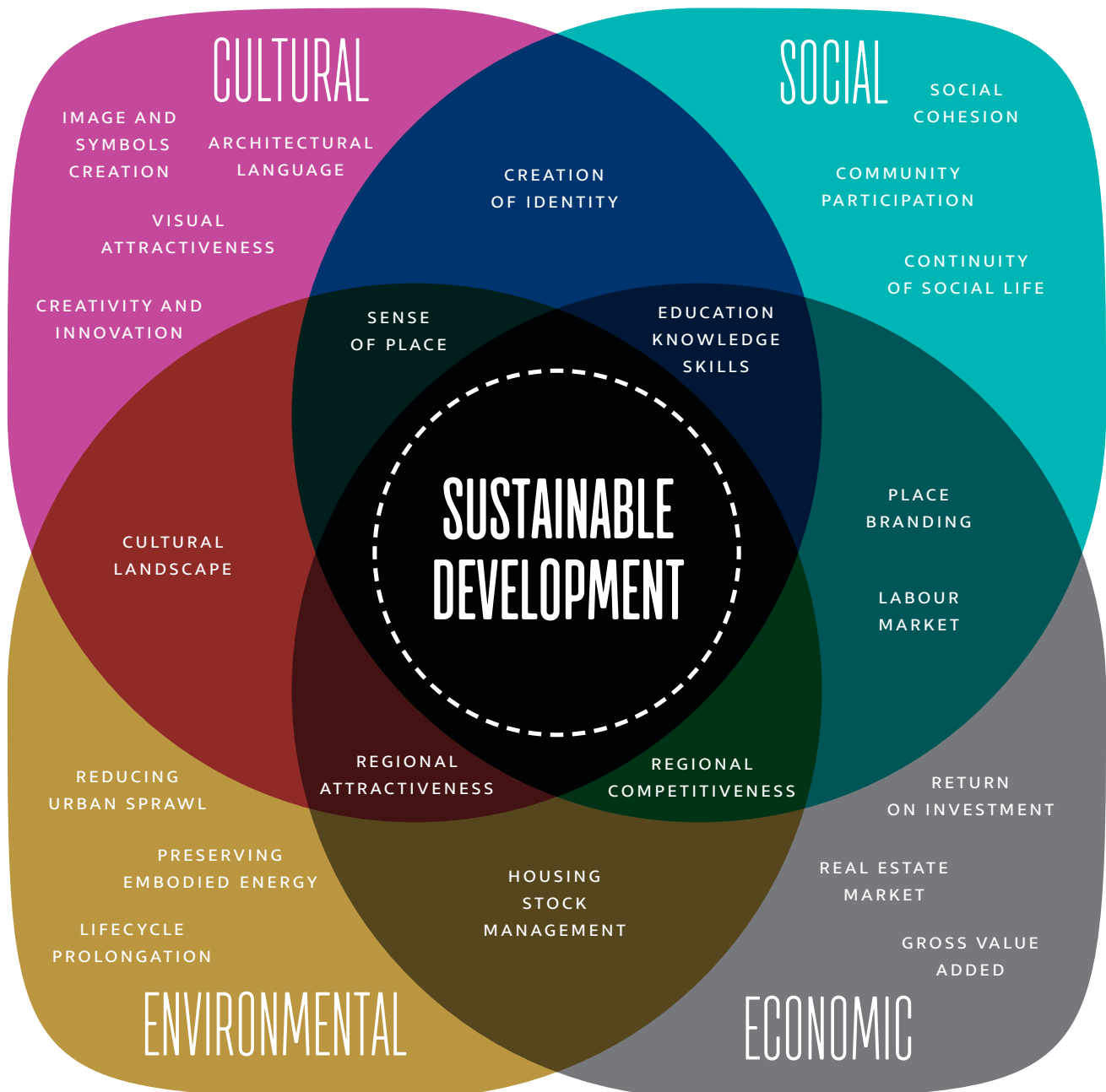
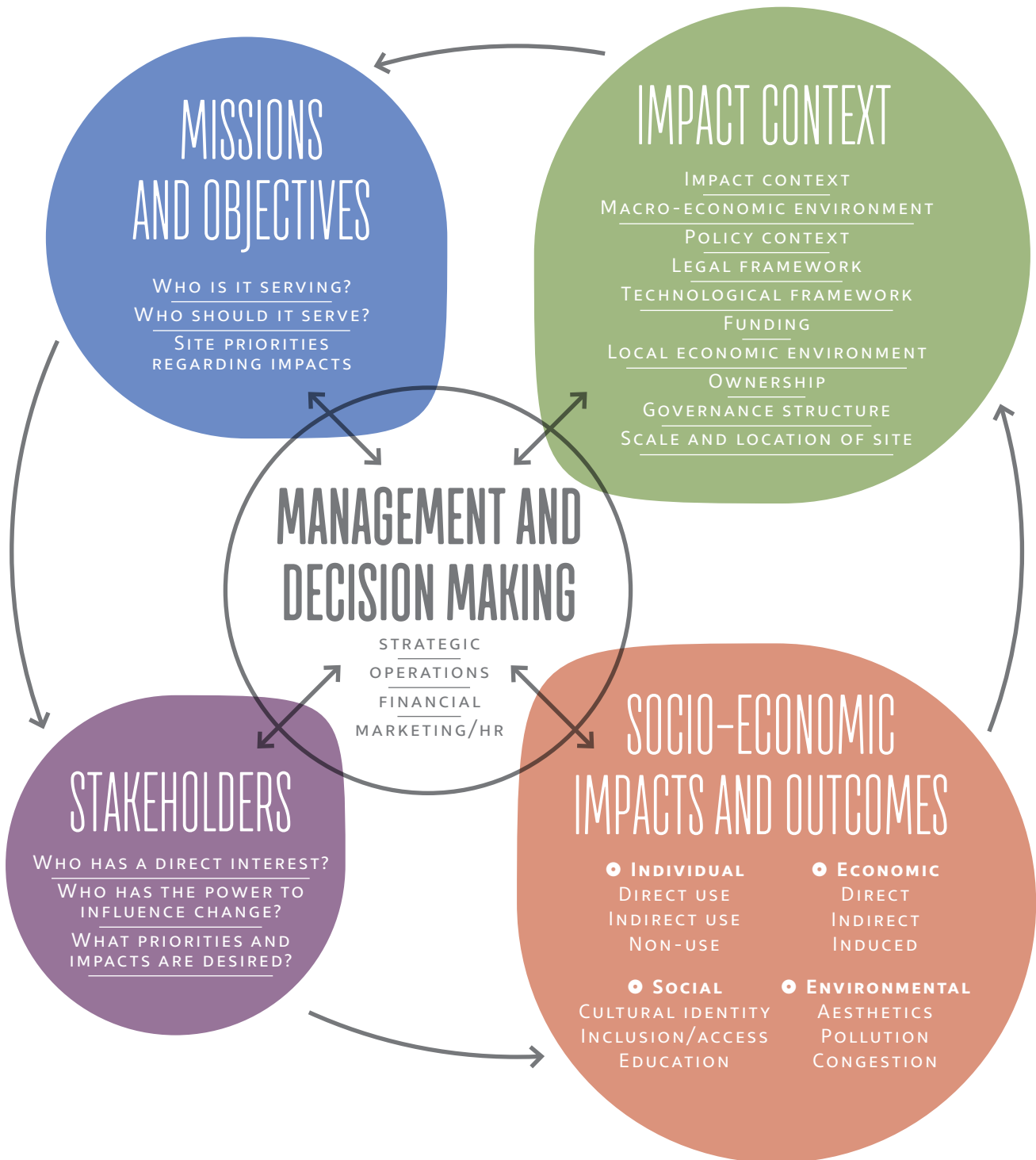


FIGURE 2.2. HOLISTIC FOUR DOMAIN APPROACH TO THE IMPACT OF CULTURAL HERITAGE

SOURCE: OWN.



🔗 **FIGURE 2.3.** DYNAMIC, HOLISTIC IMPACT MODEL FOR CULTURAL HERITAGE

SOURCE: McLoughlin, et al., 2006a, p. 44.

2.5.2 ECONOMIC IMPACT

WHY DISCUSS THE ECONOMIC VALUE OF HERITAGE?

In the light of what has been said above one might ask whether a discussion on the economic value of heritage is necessary at all. The theory of public goods sanctions the need to incur costs on the protection and promotion of heritage. However, it does not suggest what kind of costs would be justified, or how to calculate the expenses and the benefits of the expenditure. At least for this very reason, one should take a closer look at the efforts of economists to assess the value of heritage. Such publications are still a relative novelty, yet they often draw on the economics of environment, which as a field of research has emerged earlier and, due to the similar nature of researched goods, has developed useful tools and methods.

As the World Bank suggests, cultural goods have economic value and a potential that can be grasped, assessed, as well as increased by adequate policies and effective valuation (2001, p. 55). However, as Mourato and Mazzanti (2002, p. 51) point out, cultural assets, since they are not being traded in the market, are valued by society in a way external to markets. Results of this market failure can be severe, including underfunding and reliance on public support (and therefore being left at the mercy of politicians). They go on explaining that:

If the alternative to economic valuation is to put cultural heritage value equal or close to zero, the cultural sector would, as a result, be severely damaged. Ignoring economic preferences can lead to undervaluing and under-pricing of cultural assets. This, directly and indirectly, reduces the amount of financial resources available to cultural institutions relative to other public priorities (p. 68).

Therefore, some way of attributing value to cultural heritage is important. It has, in fact, been increasingly recognised as a part of cultural policy in works by Frey (2000), Throsby (2011) or Navrud and Ready (2002), just to mention a few.

Such an approach, however, still awaits implementation on many levels of political decision making. Pūķis, among others, points out the necessity of research on benefits stemming from public expenses on cultural heritage, presents a means of structuring the central budget of Latvia, and emphasises that heritage is featured there only in the section on expenses and as such, it considered a burden, leading to the incomprehension of the potential, including economic potential, of heritage (2011, pp. 11-12). This situation is quite common, especially in Central Europe, yet the introduction of projects supported by the European Structural Funds forces some changes in the approach to heritage and, more widely, to culture as a pro-development value.

The literature review provides us with at least three existing approaches to valuing cultural heritage (Economics for the Environment Consultancy, July 2005):

- estimation of cultural value while ignoring economic value;
- determining economic value and ignoring the cultural value;
- assuming that the total value of heritage comprises both cultural and economic value (see for example Throsby, 2011).

Many specialists in the domain of culture and heritage (non-economists) tend to claim that it is inappropriate to try to assess the economic value of cultural heritage (usually equated with financial value) and treat it as a sign of incomprehension and underestimation of the “real” value of heritage. This approach raises an important issue — what if there is a heritage asset not appreciated by the general public but valued highly by a small group of experts? In such a case economic logic might disregard the need of conserving such an asset. “It is partly this fear (that popular opinion might not favour the conservation or protection of assets that those ‘in the know’ might) that explains some of the suspicion about the notion of economic value,” notes Economics for the Environment Consultancy (July 2005, p. 15). However, the arguments raised to support this fear — that the general public does not have enough knowledge (and therefore their views should not be considered) — also seem unacceptable in a democratic society. Another type of claim supporting the idea of abandoning the economic value assessment focuses on the concept that heritage as such is priceless and it should be treated in moral not monetary terms. But if the benefits are presented in a non-monetary way and the costs in a monetary term, how can a rational decision be taken? As Economics for the Environment Consultancy (p. 12) argues, all decisions have consequences (costs) and when making them, one conducts an economic valuation either explicitly or implicitly. Even if we consider that heritage assets have the intrinsic value independent of any human valuation (an issue debated by philosophers), for the policy consideration it is important to establish what this value is.

Standard economic approaches ignore cultural values not because of their lack of importance, but rather because they are not considered as separate values. Instead they are seen as determinants of economic value or the motives for value (Pearce, et al., 2001). The cultural values exist and transfer meaning to people but the question how to allocate resources for heritage protection or how to prioritise remains. Obviously, critique of such a standpoint can be based on an argument that for example spiritual values cannot be reduced to monetary terms only.

Without getting deeper into the discussion, it seems adequate to sum it up by acknowledging that although Klamer and Zuidhof (1999, p. 23) are right noting that

the ultimate concern [of culturalists, defined by the authors as people dealing with heritage who come from such disciplines as anthropology, sociology, history, geography; a frequently used synonym is “humanists”] is that economists and economic practices

insufficiently appreciate the wide range of values of cultural heritage [...]. Economists, conversely, complain about culturalists who fail to acknowledge the economic realities regarding cultural heritage and efforts at conservation.

It is Mason (2007, p. 10) who finds a good way out of the dispute. He underlines that

— *[w]hile heritage professionals may regard economics as a remote and alienating discourse, it would be ludicrous not to include economic values from our planning, management and decision-making frameworks. The question should be how.*

He goes on (pp. 16-18) to explain why the specialists in the field of heritage should not disregard economics. Whether we like it or not our world is market-centred and assessing the value of heritage in monetary terms is important politically as it legitimatises expenditure on its conservation. As the resources are scarce it may seem important in some cases to have economic research done to answer questions about efficiency or priorities. One should also not forget that economics have both philosophical and mathematical traditions, although the latter seem to dominate the contemporary discourse.

Throsby argues that economics should acknowledge that there is a fourth distinctive category of capital, besides physical, human and natural: cultural capital. This can be defined as “the stock of cultural value embodied in an asset [...] which may give rise to a flow of goods and services” (1999, p. 6), that have both cultural and economic value. There could be a causal connection between the two. For example, the economic value of a building stems from its physical value, but in case of a heritage building, its economic value might be increased by the cultural value (clients may be willing to pay more exactly because of it). Heritage assets are, therefore, characterised by both economic and cultural values. Consequently, Throsby claims that any project undertaken in the field of cultural heritage does not only refer to economic capital but to cultural capital as well, and therefore, both types of capital and their impacts and benefits should be evaluated (2001, p. 77).

CULTURAL HERITAGE — PUBLIC, PRIVATE AND MERIT GOOD

In order to understand how cultural heritage is or might be treated in strategic thinking and decision-making processes, it is important to clarify that cultural heritage assets are economic goods — commodities or materials that satisfy people’s (consumers’) wants and needs and provide them with a certain utility. For a number of reasons, however, heritage goods differ from most commodities exchanged on the market. As Nijkamp (2012, p. 77) notes, “[c]ultural heritage should not be defined as a ‘soft’ or ‘qualitative’ good. It is observable, visible, and measureable in nature and should essentially be treated in the same way as ‘normal’ economic good.” However, some of its characteristics make it distinct, since in most cases cultural heritage is not reproducible as it is associated with certain historic, cultural, political or socio-economic events or goods of the past.

Apart from the antiques market or some historic buildings traded on the real estate market, most heritage goods are not exchanged on the market.

Cultural heritage assets are usually described as public or quasi-public goods with a non-exclusive and non-rival character. The economic concept of public good should not be confused with the expression “the public good,” which usually denotes the collective ethical notion of “the good” in political decision-making. Neither should it be associated with its provision by the public sector. According to the definition (Gravelle & Rees, 2004), pure public goods are non-excludible, which means that users cannot be excluded from enjoying a certain good (e.g. sightseeing a historic city centre), and non-rival, that is that two different people may enjoy it simultaneously without reducing each other’s enjoyment. Cultural goods vary in their degree of excludability, considering, for example, visiting a museum with a paid admission. This attribute is important as economic theory claims that private, profit-driven markets will not be able to produce enough non-exclusive goods. Many cultural heritage goods display intermediate levels of rivalry, like in the case of a popular heritage site overcrowded with visitors. Such a place would be called a congestible public good and, in some cases, it might be necessary to limit access due to protection considerations (Ready & Navrud, 2002, pp. 3-5). This is why many cultural heritage goods fall into a category of quasi-public goods.

The concept of cultural heritage as providing economic good can raise external factors that need to be considered. These are unintended benefits or costs (spillovers) generated by an economic good. They affect people who are not its direct consumers and are not accounted for by market transactions (hence the name — they are external to the workings of the market). As benefits generated by cultural heritage are difficult to capture through conventional market mechanisms, there might be a tendency to undersupply this type of goods. There is also the “free-rider” problem related to cultural heritage, occurring in situations when people have access to a good yet do not pay for it. Private for-profit providers are not to be expected to supply enough of such goods. Therefore, it is the role of the government (or sometimes non-profit organisations) to provide the society with them (the same goes for other public goods, such as clean air).

Cultural heritage can also be treated as a merit good, which according to Cwi (1980, p. 39), is a good that “some persons believe ought to be available and whose consumption and allocation are felt by them to be too important to be left to the private market.” The main difference between a merit good and a public good is that the former does not take into account consumers’ will. Their support by the state requires value judgement and may interfere with consumers’ preferences.

Some goods display characteristics common to public, merit and even private goods. Such might be the case with cultural heritage. Without going further into a theoretical discussion on definitions, it is worth referencing Ver Eecke (1998) who advocates considering all these characteristics when discussing arguments for public funding of culture. In a similar way to his statements on the arts, one

may assume that arguments for public support for cultural heritage could be presented in private goods terms (e.g. economic impact studies), public good terms (e.g. contingent valuation studies) and merit goods terms (e.g. qualitative historical studies including value judgements).

The complicated character of cultural heritage and the specificity of the heritage sector led Mazzanti (2002, pp. 540-541) to claim that cultural goods should be described as multi-dimensional (linking features of merit, public and mixed goods), multi-attributed (attributes understood as services and functions generating economic benefits from the cultural capital) and multi-valued resources (internal – use and non-use – and external values). See figure below.

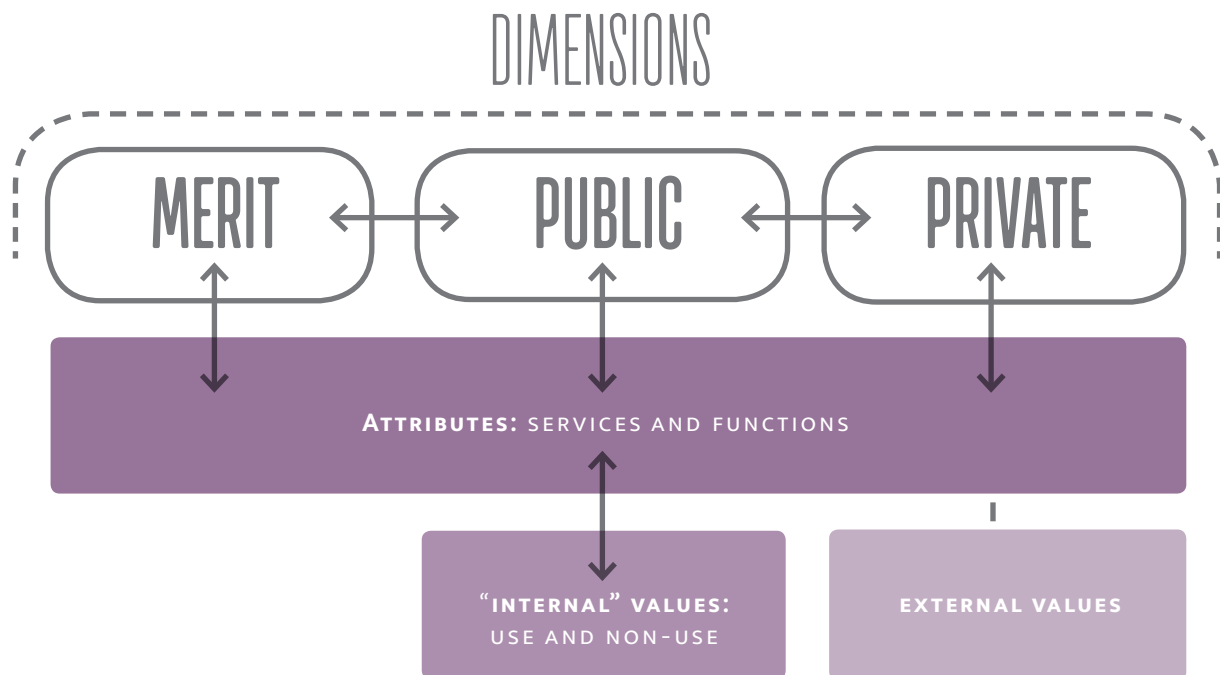


FIGURE 2.4. CHARACTERISTICS OF CULTURAL HERITAGE GOODS — CONCEPTUAL FRAMEWORK

SOURCE: Mazzanti, 2002, p. 541.

Within this framework the concept of public value is important. This notion was developed by Moore and Bennington (cited in National Trust and Accenture, 2006, p. 10). They argue that there is a need for public institutions which deliver high quality customer oriented service and thereby offer value for money of taxpayers. They conclude that governments should have clear, long term goals expressed as desired outcomes. The model of public value generally adopted by the heritage sector identifies three equally important values:

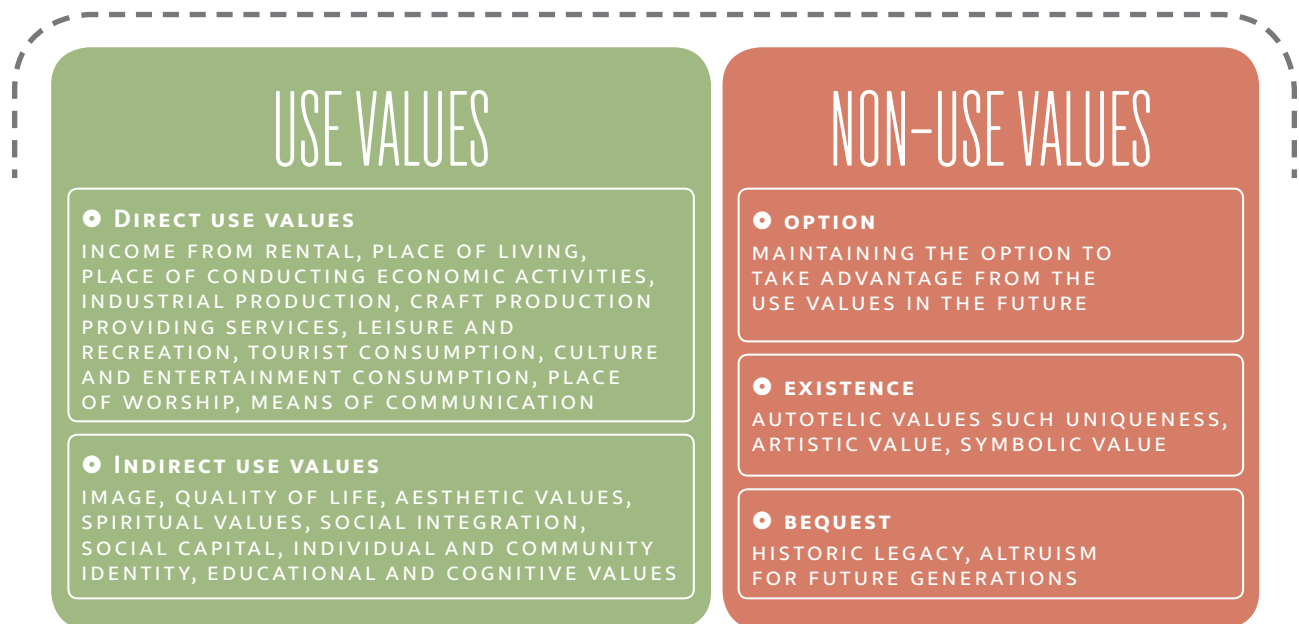
- intrinsic value: value inherent in heritage, the benefit derived from heritage products for their existence value and for their own sake;
- instrumental value: the benefit in terms of visitors, volunteers and wider social, economic, environmental and educational benefits at a community level;

- institutional value: the process and techniques used to create value, organisational legitimacy, accountability, and public trust in the organisation, as well as fairness and equality of organisational processes (National Trust and Accenture, 2006, pp. 10-11).

IMPACT ON ECONOMY

Before elaborating on the economic impact of cultural heritage, it is crucial to understand the importance of a holistic approach towards the economic value embodied in cultural heritage. It includes both use (value derived from actual “using”, consuming a given good) and non-use values (ascribed to goods that might not ever be “used” by a given individual). Two kinds of use values can be distinguished: direct and indirect. The direct use value generated by immovable heritage is usually lower than the financial return generated by a given object. In an era of tightly constrained public finances, this may lead to the conclusion that cutting financial support in this area is justified, as it only generates costs (Pūķis, 2011, p. 17). However, in order to estimate the value and “usability” of heritage, one needs to consider the total economic value of heritage, as illustrated by Figure 2.5.

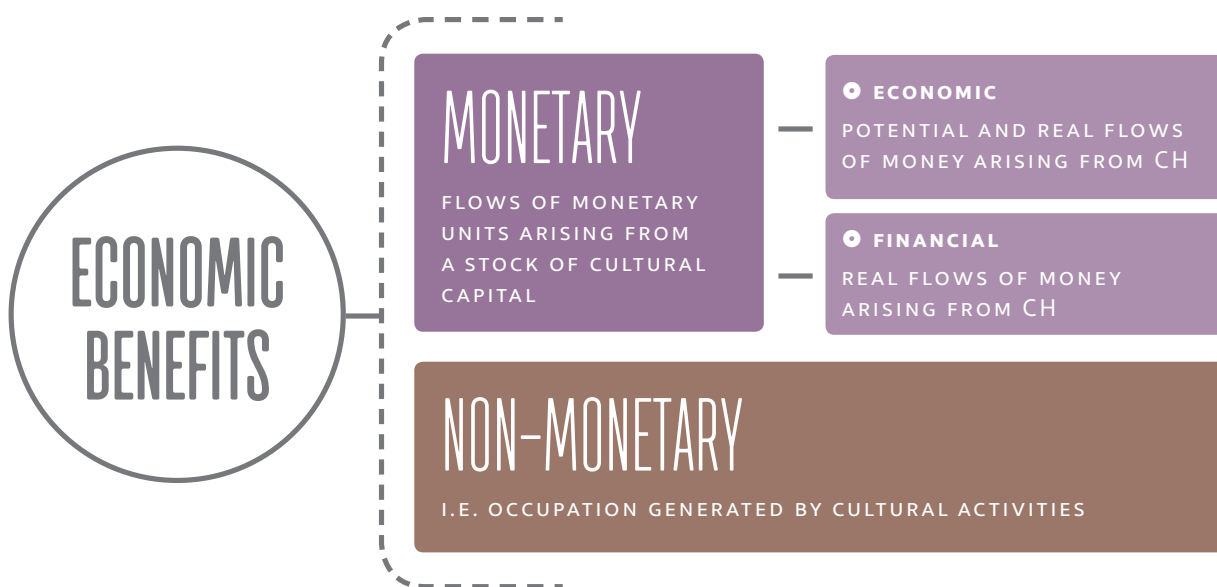
TOTAL ECONOMIC VALUE OF IMMOVABLE HERITAGE



● **FIGURE 2.5.** TOTAL ECONOMIC VALUE OF IMMOVABLE HERITAGE

SOURCE: Murzyn-Kupisz, 2012, p. 137.

Economic impact may be seen as an influence or as a result of changes brought about by either implementing a special programme, policy or a project, or the existence of a certain object or project. As Radich puts it, it is “the effect of that phenomenon on such economic factors as the economic behaviour of consumers, businesses, the market, industry (micro); the economy as a whole, national wealth or income, employment, and capital (macro)” (Radich, 1987). The impact may be estimated in terms of business output, value added (or gross national/regional product), wealth (including property values), personal income (including wages) or jobs (for examples see Chapter 3). These measurements may indicate changes in the economic situation or well-being of residents of a given area. Behavioural economics may also emphasise the impact on quality of life. Mazzanti (2003) provides us with a division of economic benefits into two main categories: monetary and non-monetary, with the former being further divided into economic and financial benefits (see the Figure 2.6).



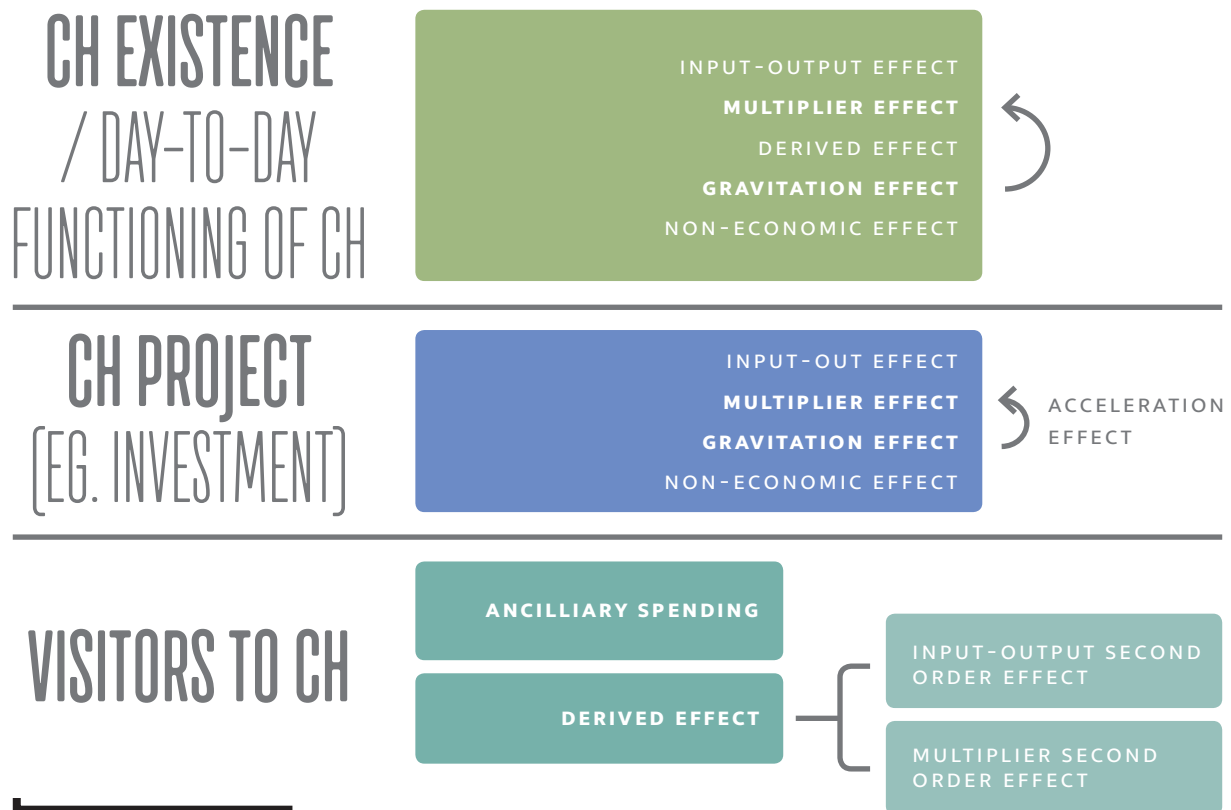
🔗 **FIGURE 2.6.** ECONOMIC BENEFITS PRODUCED BY CULTURAL HERITAGE

SOURCE: Mazzanti, 2003, p. 550.

Various authors, including Bowitz and Ibenholt (2009, pp. 3-4), distinguish between direct and indirect impact. The direct impact refers to the effects of the cultural heritage project or a site itself and may be measured in sales (however, they tend to be inflated and difficult to interpret), added value or employment. The authors draw our attention to the methodology of measurement; namely, that it is important to include only fees from visitors from outside the region where a given heritage site is located (if the residents spend more money on cultural heritage, it is at the expense of their other expenditure that if spent in the place of residence would contribute to the local economy anyway). Additional spending by residents could only be considered if it was possibly to prove that the spending would otherwise have been taken outside the community. Indirect

impact refers to the influence of the heritage on the wider environment or to spillover effects. These are more difficult to measure, since it is not always clear whether there is a causal relation between the site and the impact.

Effects arising from cultural heritage may also be divided into direct, indirect and induced impacts. The last notion concerns a situation where different cultural heritage benefits materialise when various associations to cultural heritage are used in other economic sectors, not related to heritage (that includes culture and creative industries, crafts and other production). To understand the effect cultural heritage might have on its environment one must also remember that a euro incurred on cultural heritage may stimulate actions and flows of financial resources in other areas or sectors bringing additional income or development to a given place (as an injection of extra money into the economic system leads to more spending, which creates more income, which in turn creates more spending and so on). This is called a multiplier effect that can be further subcategorised into: supply multipliers and income multipliers, including a tourism multiplier effect, depending on the sources of multiplication. For cultural heritage to have impact on its local community through the multiplier effect, it is important to bear in mind that the effect is stronger when goods and services for the cultural heritage project or maintenance of a heritage site are bought locally and when it uses its local labour.



📌 **FIGURE 2.7.** TYPES OF INDIRECT IMPACT GENERATED BY CULTURAL HERITAGE

SOURCE: own based on Bowitz & Ibenholt, 2009.

According to Seaman (2003, p. 77), traditional economic impact studies usually focus on increases in short-run net local income and as such they are incomplete and could be misleading, especially if one tried to use them in public policy towards arts and heritage. The full equation of net benefits streaming from any project, investment or public expenditure should include more elements:

net benefits = consumption value – [capital, operating costs]
 – [environmental, congestion, public safety and other costs] + [increase in local productivity and long-run economic growth and development]
 + [increases in short-run net local income]

2.5.3 SOCIAL IMPACT

The concept of social impact is an increasingly broadening category of impact reflecting societal changes. Certainly as far as cultural heritage is concerned, the superiority of high culture, for example, can no longer be maintained in post-modern times with cultural heritage increasingly appropriated by involved communities. This great inclusiveness has contributed to the recognition of the importance of cultural heritage to a sense of belonging and cultural identity (Tweed & Sutherland, 2007, p. 63). Indeed, cultural heritage is closely linked to social values as it is a social construction itself. People decide what constitutes heritage and what does not. Heritage is not a given fact or characteristic of an object but part of the culture of a particular society (Zetti, 2010, p. 234). Landry et al. (1993, p. 29) define social impact as “[t]hose effects that go beyond the artefacts and the enactment of the event or performance itself and have a continuing influence upon, and directly touch, people’s lives,” and Reeves (2002, p. 29) as “[t]hose effects which [...] have resonance with the life activities and processes of individuals.”

The report of the European Task Force on Culture and Development, commissioned by the Council of Europe in 1997, elaborates on the definition of economic and social impacts for arts in general. Basically, impact equals the contribution of arts and culture to society. This report defines direct and indirect impact separately. Definition of the direct social impact refers to the fact that arts and culture provide “socially valuable” leisure activities, “elevate” people’s thinking and contribute positively to their psychological and social well-being as well as enhance their sensitivity. Whereas indirect social impact means that the arts enrich the social environment with stimulating or pleasing public amenities. They are a source of “civilising” impacts and social organisation (e.g. amateur arts). Works of art and cultural products constitute a collective memory for a community and serve as a reservoir of creative and intellectual ideas for future generations. Arts and cultural institutions improve the quality of life and can also enhance personal security and reduce the number of incidences of street crime and hooliganism in urban areas (European Task Force on Culture and Development, 1997).

The effects of cultural heritage can be classified depending on whether they affect the individual or the society. Moreover, the effect can be instrumental or intrinsic. McCarthy et al. (2004) visualised this approach in a scheme in which the impact of culture on the individual and on society are placed within these spectra.

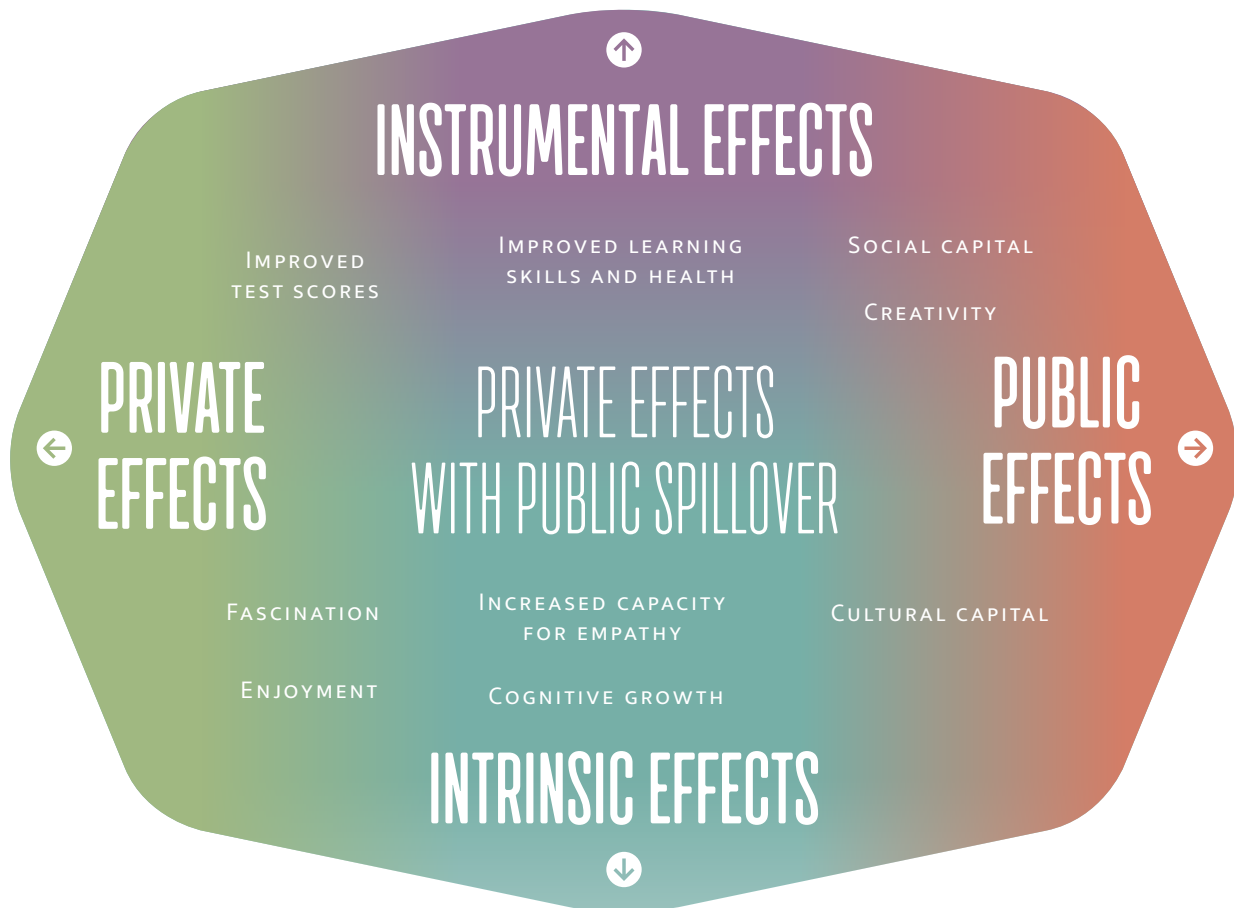


FIGURE 2.8. FRAMEWORK OF THE EFFECTS OF CULTURE ON THE INDIVIDUAL AND SOCIETY
SOURCE: McCarthy, et al., 2004, p. 4.

SOCIAL CAPITAL

The effects of cultural heritage on the social domain can be described as an enhancement of social capital. This sort of capital is inherent to social relationships and may be conceived as a resource in which we invest to generate a stream of benefits. The notion of social capital, as a unifying concept in a multidisciplinary view on the functioning and development of society, has been greatly elaborated by the research of Robert Putnam and James Coleman. For Putnam et al. (1993), social capital is determined by those features of social organisation, for example the network of households and individuals with their connected

norms and values, which create externalities for society as a whole. These externalities were originally considered by Putnam as being purely of a positive nature, but in the meantime, he has acknowledged that externalities can occur in a negative way when they result from interpersonal interactions, where social capital is beneficial for the members of the association in question but not inevitably positive for the community at large. Therefore, when social capital is used by one group against others, it can lead to dysfunction (OECD, 2001, p. 39). Coleman (1994, p. 304) addresses the role of social capital as “facilitating the achievement of goals that could not be achieved in its absence or could be achieved only at a higher cost.” According to The World Bank (Grootaert & van Bastelaer, 2002, p. 4), social capital entails the relationships, institutions, values and attitudes that determine interactions among people and contribute to social and economic development. A distinction can be made between bonding social capital, which is characterised by strong ties and personal trust between family or close friends, and bridging social capital, which refers to weak ties and social trust between acquaintances or members of associations (Murzyn-Kupisz & Działek, 2013, p. 36).

Putnam et al. (1993) argue that the resources of social capital are dependent on long-term historical development processes. The impact that cultural heritage can have on social capital accrues from the power of a project to unite a community or to create social networks. A community characterised by strong social capital will have a heightened sense of social and personal responsibility and display the tendency to respect social values (Nash, 2002, p. 5). In consequence, it is likely that this social responsibility will assure the sustainability of a heritage project and encourage the decrease of social problems such as anti-social behaviour and crime (Keaney, 2006, p. 22). Putnam’s research was the inspiration for the Better Together initiative, which proposes several ways in which to build social capital. Many of these are linked to cultural heritage and heritage institutions suggesting that engagement in activities relating to heritage can increase social capital, such as going to a local folk or crafts festival, collecting oral stories from older town residents, visiting and discussing historic sites, and participating or volunteering in events at local museums, heritage institutions or libraries (BetterTogether, 2001).

Murzyn-Kupisz and Działek (2013, p. 45) identify seven of the most important ways in which cultural heritage can have a beneficial impact on social capital:

- heritage sites or institutions can function as community hubs, where people meet, have interactions and discussions;
- heritage sites or institutions can count as the inducement for local celebrations and festivities;
- immaterial heritage is transmitted from generation to generation through dense networks of professional and personal links;
- heritage can play a role in attracting new residents and facilitating their integration in the local community;

- heritage sites can emanate symbolic meanings which refer to tolerance, respect for diversity and promoting social inclusion;
- heritage can form the main goal to organise communal activities and associations;
- heritage can play a key role in urban and rural regeneration, which can not only impact the physical aspects of a place, but also the social renewal.

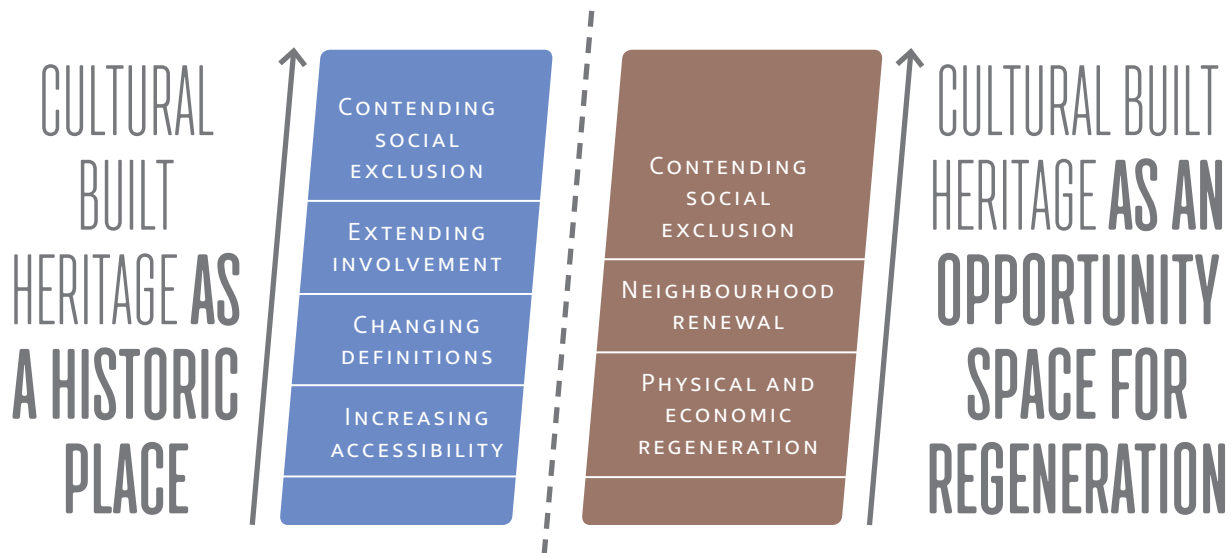
Social impact is often projected as an aim of a heritage project related to cultural heritage functioning as an instrument to engage with disparate groups within society. However, tracing empirical proof of the effects that cultural heritage can produce at a social level is a complex exercise, requiring an assessment of impact on an individual scale, as well as an examination of how heritage projects influence the societal level within a longer timeframe. In Europe, cultural strategies with the objective of achieving greater social equity and more socially inclusive urban environments have been developed since the late 1990s (McLoughlin, et al., 2006a, p. 55; Landorf, 2011, p. 463).

SOCIAL INCLUSION

The category of social inclusion is generally used without rigor or seen as an opposite of social exclusion, which is an abridged label for what can happen when individuals or areas suffer from a combination of problems such as unemployment, poor skills, low incomes, poor housing, high-crime environment, bad health or family breakdown. Social exclusion can be considered as relative and dynamic, because there is a possibility to evolve from exclusion to inclusion and vice versa (Institute of Field Archeologists, IFA & Atkins Heritage for the National Trust, 2004, p. 12). Pendlebury et al. (2004, p. 21) argue that the concept of social inclusion is a very broad category that can be used to express various ways in which cultural heritage can be employed in a socially progressive manner. They develop a framework that defines three ways in which the historic environment can contribute to a higher degree of social inclusion. Each opportunity leads to a greater degree of benefit for people and communities. The first way relates to increasing accessibility to existing cultural heritage; this includes physical, financial and intellectual access. Facilitating access to the historic environment can play a vital role in linking individuals to the community by attaching them to society's values and ideas. The second option stems from the need for a more pluralistic definition of heritage, which recognises more modest "everyday" heritage, the heritage of ethnic groups, and acknowledges conceptions of heritage in a shorter period of time. It is argued that the extension of this concept could help foster community pride and enable finding resources for regeneration and neighbourhood renewal. The final possibility mentioned by Pendlebury et al. concerns the extension of the involvement of society members in heritage projects. These initiatives can target excluded groups and stimulate volunteering, lead to more actively engaged communities, finally, help people obtain a higher self-esteem and develop skills.

Besides these possibilities, Pendlebury et al. argue that the historic environment might also contribute to social inclusion in a more indirect manner, as a place where physical and economic regeneration or neighbourhood renewal can occur, which in turn can lead to an improvement of the social capital of the area.

Furthermore, Pendlebury et al. propose a ladder of social inclusion and culturally built heritage (Figure 2.9) based on the development presented by Arnstein in her article *A Ladder of Citizen Participation* (1969). This ladder was created to illustrate the different levels of citizen engagement which could have been adopted in the framework of urban regeneration in the 1960s in the US, with the most enabling processes on the top step (p. 217). Although the concept has met with criticism throughout the years, the simplicity of the ladder can be useful here to illustrate the different degrees of empowerment in the process of social inclusion induced by built cultural heritage. The different steps should be regarded as the progressive phases during which the empowerment of the groups currently outside the mainstream is enhanced. The impact of each of the steps can be of a very diverse nature, it might consist in an increased amount of employment possibilities or reinforcing civic pride and identity (Pendlebury, et al., 2004, p. 28).



❏ **FIGURE 2.9.** LADDERS OF SOCIAL INCLUSION IN RELATION TO THE BUILT HERITAGE

SOURCE: Pendlebury, et al., 2004, p. 16.

Because of the strong intertwining of the social impact of cultural heritage in reality (and the supporting diagnoses proposed in the related studies identified), Pendlebury's definition of social inclusion as a broad concept will be followed in this report. Social inclusion is thus treated here as the over-arching term describing all impacts that cultural heritage can exert on the community, including social cohesion, community participation and continuity of social life.

2.5.4 CULTURAL IMPACT

Culture may be defined in several different ways, depending on the field of study. For the purpose of this report, we shall be drawing on the definition of culture proposed by UNESCO in the introduction to the Universal Declaration on Cultural Diversity:

Culture should be regarded as the set of distinctive spiritual, material, intellectual and emotional features of society or a social group, and that it encompasses, in addition to art and literature, lifestyles, ways of living together, value systems, traditions and beliefs (UNESCO, 2001). The impact of cultural heritage on culture often overlaps with impact on social issues more generally. One domain that demonstrates this is education which, as already mentioned, clearly has both a cultural and social role to play. Including this area as a field of cultural impact is a decision of the authors of the report as this classification was considered necessary to effectively structure the research.

The impact of cultural heritage on culture may seem the most obvious of all four impact areas identified in this report. Cultural heritage is a part of culture itself, hence any intervention in its resources is directly reflected in culture (both in a positive and a negative way). Investment in cultural heritage enriches the culture of a given place in a natural way, it contributes to the development of academic research in a given field (archaeology, art history, architecture), and widens the scope of the cultural offer. In practice, every piece of original scholarship — a book, an article, a debate — on cultural heritage expands the field and in that way impacts its development. However, this kind of impact of heritage is rarely discussed in literature that addresses the issue. A way of measuring an impact of research in the academic world is the impact factor of publications, indexes of citation, and points awarded for publishing in specific journals (prestige of a journal is assessed by the number of points; the more points, the more prestigious the journal is). Whilst this assessment of scholarship is functioning across the world in various disciplines, in humanities it raises constant doubts as to whether narrowing the value of research to numbers is the best way to express the importance of research.

During the UNESCO International Congress “Culture: Key to Sustainable Development”, organised in May 2013 in China, culture was given a key position in international and national strategic documents, and The Hangzhou Declaration *Placing Culture at the Heart of Sustainable Development Policies* was adopted. It states that:

The cultural dimension should be systematically integrated in definitions of sustainable development and well-being, as well as in the conception, measurement and actual practice of development policies and programmes.

Among detailed remarks especially relevant for this report is the following observation:

— In areas that have experienced violent conflicts, the rehabilitation of cultural heritage and cultural activities should be promoted to enable affected communities to renew their identity, regain a sense of dignity and normalcy, enjoy the universal language of art and begin to heal the scars of wars (UNESCO, 2013).

Within the cultural dimension there are several categories that can be named on which cultural heritage has some kind of impact: historical value, commemorative value, aesthetic value, symbolic value, educational value, sense of place and identity, branding, and social participation in reference to the role in cultural life. Those are not mutually exclusive categories: many of them are interrelated with other areas, especially with the area of society. In his *Economics and Culture* (2001), Throsby identifies several of the most important features of cultural value related to a cultural heritage monument (p. 84):

- aesthetic value: a monument possesses and expresses beauty of certain fundamental significance;
- spiritual value: when expressed by a monument it can contribute to the formulation of the sense of identity of entire communities or individual members of community;
- social value: the monument contributes to the stability and coherence of a given community;
- historical value: contributes to the shaping of identity of a group, providing a link with the past and acting as a source in the present;
- symbolic value: a monument possesses certain sense and content that help the community interpret its identity and define its cultural personality;
- authenticity value: integrity, uniqueness.

The CHCFE literature review suggests that out of these characteristics, the social value is most often addressed, which refers to the connection with others, identity, identification, as well as aesthetic and symbolic values, and authenticity. The latter being, in particular, related to authenticity. Historical value as directly linked with the cultural impact of heritage features relatively rarely, as does spiritual value.

Regarding cultural value of heritage, museum education is one of the most thoroughly researched fields, even though the reviewed literature suggests numerous gaps and the need for further systematic research. The leaders in the field are the United Kingdom, the United States and Australia. Value and impact of museums on various fields, as well as their educational role, have been widely discussed, especially in Britain. Works on this topic focus both on theory and methodology, as well as including results of field research. In a 2011 report by the Netherlands Museums Association titled *More Than Worth It*, five values that make up the social significance of museums are set out:

- collection value: is at the core of a museum's existence and comprises a broad range of values related to collecting, conserving, managing, and exhibiting activities;

- connecting value: depends on the museum's capability to act as a networker and mediator between various groups in society (giving consistency to current topics and issues through relevant and meaningful contexts) and to become an ideal platform for communication, debates and entering into partnership with different stakeholders;
- education value: lies in the museum's ability to propose itself as a (formal and informal) learning environment for a broad range of people. Museums can serve as schools in a literal sense as well: for young people to complete work placements, for adults who want to nurture their interests, for academics to conduct research;
- experience value: is related to the museum's capacity to provide opportunities for enjoyment, experience and adventure; a place for inspiration, relaxation and also action, where people can be stimulated both physically and intellectually;
- economic value: depends on the museum's contribution to the economy of a place: the number of tourists that museums attract, the jobs they create directly and indirectly, the capital represented by the thousands of volunteers, museums' appeal to businesses and to families with high levels of education, and the multiplier effects on local income and revenues (cited in Bollo, 2013).

This particular typology combines the cultural, social, and economic impact of heritage. In 1997, Matarasso formulated a list of fifty social impacts of participation in the arts. Its purpose is to give a sense of the range of social outcomes that can be produced by participatory arts projects. What is more, the author emphasised that the list was not finite. Although it does concern a wide array of arts, it could also apply equally to heritage. Bollo's report *Measuring Museum Impacts* also addresses the social impact of museums and identifies the following areas related to the impact of heritage on culture (in keeping with the author's numbering):

- (4) stimulate interest and confidence in the arts;
- (6) contribute to the educational development of children;
- (7) encourage adults to take up education and training opportunities;
- (8) help build new skills and work experience;
- (25) help involve local people in the regeneration process;
- (29) develop pride in local traditions and cultures;
- (30) help people feel a sense of belonging and involvement;
- (37) help people develop their creativity;
- (50) provide a unique and deep source of enjoyment (Matarasso, 1997).

A turning point in museum education in Britain was initiated by the 1997 report titled *A Common Wealth: Museums in the Learning Age* (Anderson, 1999). It revealed major flaws in museum education in British museums and included a series of recommendations that shifted the focus from collections to a comprehensive

look on various forms of museum activity, including education as its integral part. The report emphasised the link between museums and creativity.

Kelly, who conducted research on the impact of museums in Australia, sees them as playing a major role in shaping people's worldview. She claims that "museums have opportunities to influence, challenge and sometimes change how visitors think, inspiring them to take action on big issues and be more informed citizens in an increasingly globalised world" (2006, p. 9). However, this does not mean that these possibilities are necessarily realised in practice. In the research, educational and social roles of museums are often intertwined. Opinions on "the impact of small museums in their local communities" expressed in the research conducted in Sydney overlap with social and cultural functions of museums that are defined in Europe. The Australian respondents agreed that local museums:

- develop pride in local traditions and customs;
- play an important role in tourism;
- should have exhibitions relevant to the local area;
- help people feel a sense of belonging and involvement;
- involve people in local projects;
- promote contact and cooperation across different cultures;
- develop community and social networks;
- develop contact across different age groups (Kelly, 2006, p. 5).

2.5.5 ENVIRONMENTAL IMPACT

Assessing the environmental impact of heritage involves focusing on the presence and "attractiveness" of heritage in the larger historic urban environment and understanding the impact of heritage on environmental sustainability. The latter, in particular, requires the main emphasis to be on the built urban environment and the impact of individual heritage structures.

The first aspect of heritage's environmental impact is related to the previously described policy/discourse shift towards a more comprehensive definition of what immovable heritage entails. As noted, there is a clear shift towards the concept of an all-inclusive historic urban environment where heritage objects and experiences of intangible cultural heritage are not necessarily separate entities. Thereby, the beneficial effects of maintaining and restoring immovable heritage are often related to externalities which have an impact on the economic activity, employment and well-being of the area.

These externalities involve all the factors identified as contributing to the overall quality of the neighbourhood, and therefore influencing people's and businesses'

choice of location, including diversity, tolerance and safety, environmental quality, aesthetics, urban landscapes, new amenities and facilities, opportunities for recreation, culture and an environment supportive of lifestyle choices (Cervelló Royo, et al., 2012).

The second focus on environmental sustainability relates to a more recent research field in comparison to the previously discussed impact domains (Vandesande, et al., 2014). Although the scientific research on material properties and change in relation to risk and operational management of heritage has a long tradition, the research on the impact of climate change on heritage emerged only around the 2000s. It examines for example atmospheric moisture and temperature changes causing deviations in rainfall patterns and freeze-thaw cycles, new interactions between natural and anthropogenic factors, and biological effects such as reduction in native building materials or changes in vegetation coverages, etc. (Cassar, 2009). The focus area of this research ranges from solely visual impacts and damage on heritage to rigorous statistical analyses and technical studies, regarding e.g. ground heave and subsidence causing structural damage to buildings and penetrating damp causing physical changes to porous traditional building materials (Brimblecombe, 2014). A key reference organisation that deals with climate change and the historic environment is the Centre for Sustainable Heritage at University College London (Cassar & Cockroft, 2008).

Parallel to the research on the impact of climate change, the heritage field also became concerned with the consequences of new environmental standards. Different EU directives and regulations on energy efficiency, aiming to limit carbon dioxide emissions (Directive 2013/12/EU), control the energy performance in buildings (Directive 2002/91/EC) and to introduce the restriction of specific chemicals (REACH-Regulation (EC) No. 1907/2006, CLP-Regulation (EC) No. 1272/2008), affected conservation practice. On the one hand, general indoor climate requirements and replacement of original windows are hard to fulfil without simultaneously affecting the heritage values. On the other hand, restriction of toxic substances and standardisation of construction products limit the use of the traditional building materials and conservation methods.

More recently, this specific research field started to focus on the position and role of the construction industry. Buildings are now recognised to be a major contributor to the carbon emissions believed to underlie global warming. In addition, the manufacture of modern building materials can be extremely energy intensive and the energy already put into existing structures should ideally not be lost, as replacement will almost always be more environmentally costly than refurbishment (Wallsgrave, 2007). Consequently, environmental sustainability concerns are driving investment in the construction sector towards inclusive sustainable development and innovation, contributing to a perceived transition towards maintaining existing structures rather than necessarily new development. Moreover, due to the changing context of urbanisation and market-dominant forces, small and medium-size historic towns, cities and metropolises are becoming increasingly concerned with sustainability and sustainable development.

↑
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In this context, it becomes customary to speak less of the “construction industry,” but rather of an “industry of the built environment.” The main arguments supporting this transition are that maintaining existing structures contributes to reducing urban sprawl, prolonging the physical service life of buildings and building parts (Thomsen & van der Flier, 2009), promoting waste-avoidance and preserving embodied energy. This specific transition can benefit from the knowledge gained in the field of heritage preservation. The strategic research agenda of the European Construction Technology Platform states that the European construction industry will achieve greater competitiveness and the ability to satisfy societal needs through research, development and innovation oriented towards protecting and maintaining heritage, and (adaptive) re-use of existing buildings (ECTP, 2005). Several research projects that touch upon this topic were conducted on a European level (European Union’s Energy, Environment and Sustainable Development (EESD) research programme). However, key research advances on this topic come from Preservation Green Lab, a programme office of the National Trust in USA.

Reusing and repairing the existing building stock has environmental benefits, as shown by increasing evidence that pre-1890 public buildings have a level of energy efficiency that at least matches, and sometimes exceeds, that of the most sophisticated modern buildings. Other buildings, particularly post WWI domestic dwellings, do not match the energy efficiency of recent construction. However, they can often be fitted with energy-saving insulation, which requires different skills sets from those suited to more modern buildings, in order to help them meet the efficiency standards and move towards a more sustainable world. In addition, the outcome of the last meeting of the ECTP in June 2014 in Brussels defines the environmental impact of built heritage on Europe’s sustainability as follows: minimising unnecessary demolition of buildings, reducing transport impact, connecting with the natural environment.

2.6 METHODOLOGIES FOR IMPACT IDENTIFICATION

2.6.1 THE TOOLBOX APPROACH

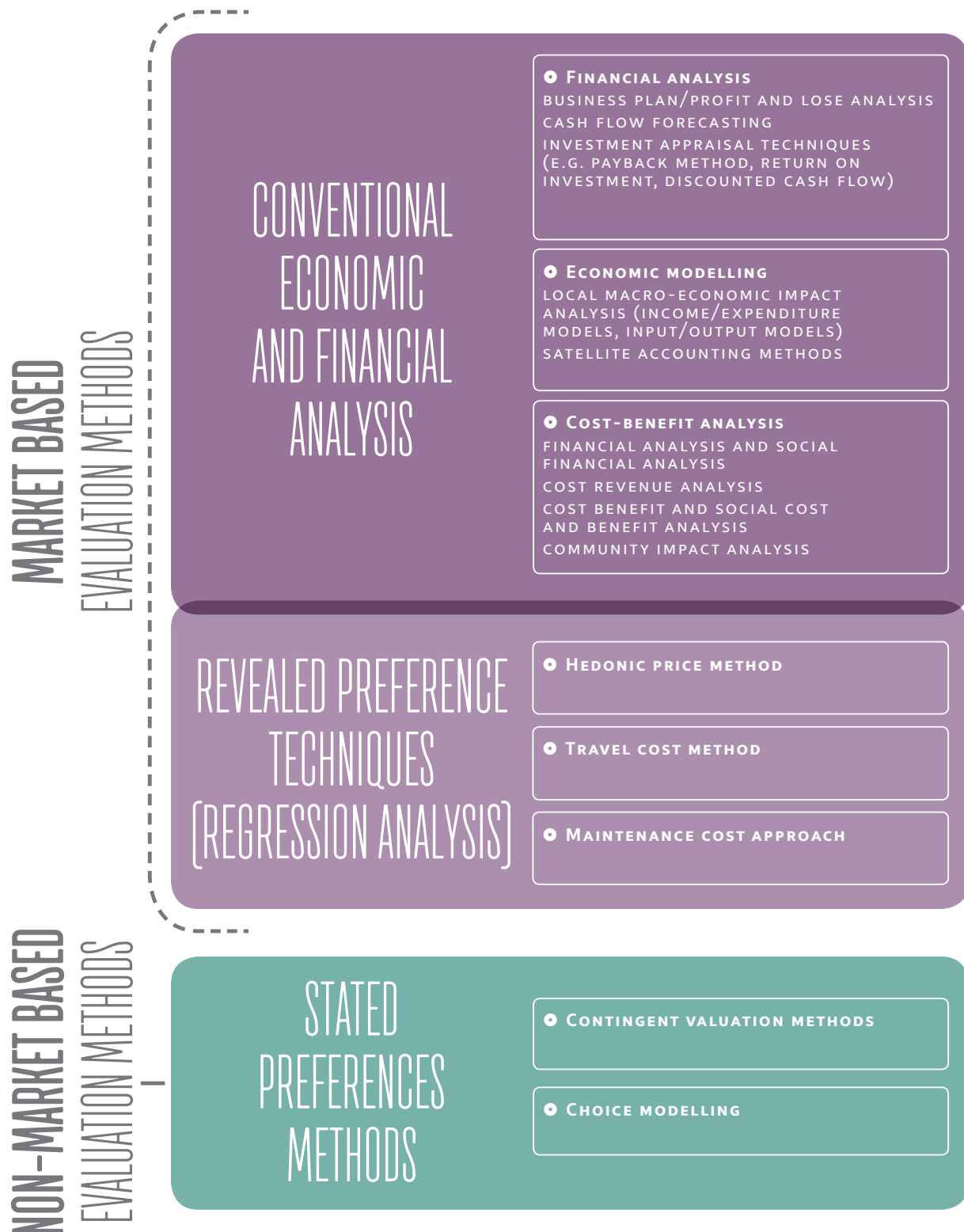
Having in mind the proposed four pillar approach, one has to find a holistic methodology that measures potential impact in all areas that might be affected by cultural heritage, even if partially or by a project done in the field of cultural heritage. A number of authors dealt with the problem, including Mason (2002, p. 16) who proposes a toolbox approach in order to assess values and potential impacts, since different values and impacts cannot be measured with a single method (economic impacts are usually assessed by means of quantitative re-

search methods, while social and cultural impacts need rather a qualitative approach). The aim of a toolbox approach is to assess all relevant heritage values and impacts using a set of different methods in complementary ways, assuming that layering different, complementary pieces of information will produce a more accurate result than the pursuit of one or two facts would. Each of the methods alone has usually many limitations as described for example by Mourato and Mazzanti (2002), Ready and Navrud (2002) or Snowball (2008). Mason (p. 17) emphasises that the question of stakeholders is essential in value assessments, since stakeholders do the valuing. Identifying the stakeholders and finding the way to reach them are essential in valuing heritage. Here, not only actual stakeholders, but also potential stakeholders must be taken into account, such as future generations or people living at a certain distance that do take some interest in a given cultural heritage asset. Similar approaches are proposed also for example by McLoughlin et al. (2006a) and Mourato and Mazzanti (2002).

2.6.2 QUANTITATIVE VALUATION METHODOLOGIES

Quantitative research refers to the systematic examination of impacts via mathematical, statistical or numerical data. It is mostly used to analyse effects on the economy. Quantitative valuation distinguishes between two main categories of evaluation techniques: market-based evaluation techniques (including conventional financial and economic analyses and regression analyses) and non-market-based evaluation techniques (including stated preferences methods). To assess the total economic value of cultural heritage assets as presented in Figure 2.10, both types of methods must be used, keeping in mind that use values are measured by both market-based and non-market-based evaluation techniques and non-use values only by non-market based evaluation techniques.

Incremental monetary effects on real Gross Domestic Product of the region, tax revenues, jobs and personal income are frequently calculated using so-called economic impact studies. Madden (2001, pp. 162-163) notes that “no single methodology characterises all ‘economic’ impact studies” and in the case of culture two broad approaches are frequently used: size analyses (which sum up related income or expenditure, and if generated from the right data, a sector’s size can be calculated as a percentage of GDP) as well as flow-on (measuring, for example, spending that would not have occurred if a given event was not implemented or the financial interrelationships between the institution or industry and the rest of the economy) and multiplier analyses (likely financial effects of a change in demand). As noted for example by Snowball (2008, p. 44), these methods present in fact only the financial aspect of the impact and do not cover the whole value (not even whole economic value) of cultural heritage goods. They should therefore be accepted as partial analyses that need to be conducted in conjunction with other studies that capture different types of values.



● **FIGURE 2.10.** VALUING ECONOMIC CULTURAL HERITAGE AND ITS IMPACT

SOURCE: own, based on McLoughlin, et al., 2006a; Mourato & Mazzanti, 2002.

As mentioned in Section 2.5.3, cultural heritage is a special type of good, mostly not traded on the markets. Therefore, additional methods are necessary to capture more than direct use impact. In recent years methodologies for establishing monetary values of non-market commodities, such as cultural heritage assets, have been developed. They include revealed preference methods and stated preferences methods. The former draws on existing market data to assess the impact of cultural heritage as a private good by analysing willingness to pay in an associate market. The stated preference methods seek to express the public-good effects of cultural heritage. They rely on the creation of hypothetical markets in which survey respondents are asked to make hypothetical choices, which are then analysed as value judgments (Mourato & Mazzanti, 2002, pp. 54-55).

All of the revealed preference methods might raise concern as to their accuracy and according to Mourato & Mazzanti seem least precise in assessing the value of cultural heritage (p. 54). The most popular revealed preference methods used in the culture heritage research are the hedonic price method and the travel cost method. The hedonic price method is based on the assumption that when buying a market good (for example a historic house or an apartment in a listed area) one might enjoy also non-market characteristics of the purchase (for example the prestige of the location in a historic area, the aesthetics of the building, etc.). To capture the value of these non-market attributes researchers compare price differentials between market goods with high and low levels of the non-market good associated with them (for example prices of modern houses in new neighbourhoods and historic houses in a listed area). The difference in prices is associated with the consumers' willingness to pay for a non-market good and it is treated as a proxy for its value. The travel cost method attempts to learn about the net value by analysing visitation patterns to cultural heritage sites. The total costs of visiting a site includes more than the entry fee; there are also all the costs incurred on the way and back from the site (hotels, petrol, food, etc.). If different individuals incur different costs to visit various places, these prices can be used instead of conventional market prices as the basis for estimating the value of cultural sites and changes in their quality (Ready & Navrud, 2002, pp. 12, 15).

In case of absence of a surrogate market for cultural goods or services stated preference methods are implemented with the contingent valuation method, which is the one most frequently used. The method consists in questionnaires where a random sample of respondents expresses their willingness to pay for hypothetical changes in the level of provision of a certain good (for example closure of a historic landmark for the public or renovation of an important monument). It is assumed that the respondents would behave as if they were in a real market. Their willingness to pay is treated as a proxy for the value they attach to a given cultural heritage asset. Choice modelling methods, or conjoint analysis methods, are another way to value non-market goods. The respondents are asked to choose between groups of attributes at different levels that make up a cultural good by either ranking alternatives in order of preference, rating them according to a scale or choosing the most preferred one (Mourato & Mazzanti, 2002, pp. 55, 64).

2.6.3 QUALITATIVE METHODS FOR ASSESSING SOCIO-CULTURAL VALUES

Qualitative research aims to obtain insights and an understanding of prevalent trends in the impact of heritage, relying on non-statistical data. A distinction can be made between qualitative methods which are not based on participatory techniques and qualitative methods which are based on participatory techniques. Participatory research methods are geared towards conducting the research process with the people whose life-world and actions are the subject of the study, including civil society, political institutions as well as local communities (Begold & Thomas, 2012, p. 2).

📌 **TABLE 2.3.** QUALITATIVE METHODOLOGIES IN CULTURAL ANTHROPOLOGY: RESEARCH APPROPRIATENESS

METHODOLOGICAL APPROACH	SCALE/LEVEL OF INQUIRY	DEGREE OF INVOLVEMENT	RESEARCH PROBLEM
COGNITIVE	individual	minimal	rules, ideas, and perception
OBSERVATIONAL	group (individual)	minimal	behaviour, observable actions, and activity sites
PHENOMENOLOGICAL	individual	total	experience of places and events
HISTORICAL	societal	minimal	social and cultural trends, comparison of sites
ETHNOGRAPHIC	group (individual)	moderate	cultural motivation, norms, values, intentions, symbols and meanings
DISCOURSE	individual (societal)	moderate	underlying meaning of speaking/conservation

SOURCE: LOW, 2002, p. 33.

REAP (Rapid Ethnographic Assessment Procedure) for example is a qualitative, participatory method used to investigate and describe the relation between local communities and park lands, which can be used to describe interconnection between communities and heritage sites (Low, 2002, p. 36). In a REAP, a number of methods are selected to produce a dataset that can be triangulated to provide a comprehensive analysis of the site. The following methods can be used (Low, 2002, pp. 37-39):

- physical traces mapping: a map has to be created which describes the physical traces of human behaviour found on the site (e.g. erosion of planting, trash, etc.);
- behavioural mapping: a map recording people and their activities and locating them in time and space;

- transect walks: a record of what a community consultant describes and comments upon during a guided walk of the site (the idea is to include one or two community members in the research team, in order to learn about the site from the community members point of view);
- individual interviews: collected from the identified population (the sampling strategy, interview schedule, and number of interviews vary from site to site; in most cases, on-site users and residents who live near the site are interviewed, but in specific situations, interviews might be collected more broadly);
- expert interviews: collected from people identified as having special expertise to comment on the area and its residents and users;
- impromptu group interviews: discussion groups with community members;
- focus groups: people who are important in terms of understanding the site and local population (in contrast to the impromptu groups, these focus groups are smaller and are selected to represent especially vulnerable populations);
- participants observation: researchers maintain field journals that record their observations and impressions of everyday life at the site; they also keep records of their experiences as they interact with users and communities;
- historical and archival documents: the collection of historical documents and review of relevant archives, newspapers, and magazines begins the REAP process;
- analysis: the different approaches provide independent bodies of data that can be compared and contrasted, thus improving the validity and reliability of data collected from a relatively small sample.

The advantage of a qualitative analysis procedure is that the data are not abstracted from their context, and so they retain their validity and detail. The final step involves a triangulation of the different analyses and a search for common elements and patterns of behaviour and the identification of common areas of interest and conflict, both in the nature of the data and in the groups themselves. ☉



📍 **A bird's-eye view of the historical centre of Cordoba** with the Roman Bridge, the Gate of the Bridge, Calahorra Tower and the surrounding areas that received a 2014 EU Prize for Cultural Heritage/Europa Nostra Award (Conservation).

PHOTO © Europa Nostra







MESO LEVEL

3

MESO LEVEL. CULTURAL HERITAGE IN THE EUROPEAN UNION: ECONOMIC, SOCIAL, CULTURAL AND ENVIRONMENTAL IMPACT

3.1

INTRODUCTION

The “meso” level analysis set out in this chapter forms the major part of the Cultural Heritage Counts for Europe research process, linking the results of the macro level to the research that has been carried out on a European level. This section of the report aims to map the European research and studies on the impact of immovable heritage. The expected outcome of this mapping process will be an overview of information on the types of studies that exist in Europe, on the key arguments employed and evidence available for attributing certain impacts to immovable heritage (scientific argumentation or discourse), but also on any shortcomings identified in the research available. A critical analysis of the collected data will enable us to make cautious statements regarding under-represented areas of impact, gaps in scientific argumentation as well as possible recommendations for the future. Moreover, from this mapping, general tendencies can be deduced and compared to the policy/discourse shifts observed in the macro level. In order to facilitate a conceptual link with that part of the report, the mapping process starts from the holistic four pillar approach and uses the same terminology of impact domains and subdomains as discussed before. Employing this terminology enables the creation of clear connections and comparisons throughout the entire CHCfE project, i.e. the macro, meso and micro levels of the report.

To achieve this goal, a questionnaire targeting mainly public authorities, cultural organisations and research institutions in the European Union was developed. It was specifically designed to collect data about individual studies on the impact of immovable heritage. In the case of each collected study the questionnaire asked for specific information on content, scale and methodology. Due to the timeframe of the project, this questionnaire was translated into an online survey and was used to collect data from the EU member states. The

tool used for collecting this data was SurveyMonkey, an online survey software developed by a cloud-based company that provides customisable surveys. The main reason for selecting this tool was its capacity to conduct an ad hoc data analysis, sample selection and bias elimination. Moreover, it allows the creation of a digital database of the collected European studies dealing with the impact of immovable heritage and enables simple queries to be made into the complete set of collected data, thus facilitating the proposed analysis. The studies were uploaded to SurveyMonkey by both research teams and external experts from the mentioned target groups encouraged to cooperate in the endeavour. Overall, there have been 221 studies collected by the survey (end of 2014). At first, a much larger collection of about 350 documents was submitted into the survey tool. A closer analysis of this collection made by both research teams, as well as screening the documents in terms of relevance for this project, resulted in the final selection of 221 studies. It should be noted that the total number of consulted studies in the framework of this project, on a worldwide and a European scale is a much higher number overall.

The survey was conducted in all EU Member States. The authors do not claim that the survey outcome is exhaustive or complete. However, the authors are of the opinion that the quantity and quality of studies collected are more than sufficient to serve as a basis for an assessment of the international theoretical and policy framework of cultural heritage impact as well as for the identification of trends and attitudes in research on cultural heritage impact in the European Union. This specific methodological approach was chosen for three very important reasons.

Firstly, the mapping was never conceived only as a means to collect data. The objective of calling for impact studies and reports from different groups on European, national, regional, local and/or sectorial levels was two-fold. Not only did we hope to collect valuable examples of cultural heritage influencing its socio-economic context, but an equally important task was to foster awareness of the impact of immovable heritage. Hence, for the Cultural Heritage Counts for Europe project, the actual process of collecting existing studies has been equally important. In this context it is important to mention the fruitful cooperation with project partners and the European Heritage Alliance 3.3 that triggered the dissemination of the online survey, as well as consultations with experts from Central Europe.

Secondly, the CHCfE project is conceived as a policy-oriented research exercise and does not aim to conduct new scientific impact research. The goal is rather to map different studies conducted on a European level, to analyse and test the data regarding their content, scale and methodology and, finally, to explain the observed tendencies in the context of the macro level analysis of available literature. The mapping progress carried out at the meso level should be seen as a first stage in an on-going process. Considering the results of the project and the importance of developing systematic data on the impacts of heritage, this tool or format may be transferred to different webpages for future continuation. The project's partners are looking for ways to keep the survey going in order

to extend the support for the proposals based on increasing input, but also to contribute to the ongoing debate that emphasises the dynamic nature of the used tool, as it happens in today's social media.

3.2 EVOLUTION TOWARDS A MORE HOLISTIC APPROACH

The aim of this subchapter is to understand how the policy/discourse shift observed in the macro level is represented in the studies collected at the European level. Considering the theoretical overview of international literature which has been provided in the macro level, a general tendency towards a more integrated and holistic approach of immovable heritage becomes evident. On the one hand, there has been a shift of focus from immovable heritage to the historic urban environment, and on the other hand, more emphasis has been put on sustainable development.

To understand how this policy/discourse shift is represented in the aforementioned studies, two specific aspects have to be reviewed: the focus of the collected studies and the impact domains that are dealt with by them.

3.2.1 THE FOCUS OF THE COLLECTED STUDIES

In the case of each submitted study, the respondents were asked if the given study focuses exclusively on immovable/built/architectural heritage or on immovable heritage in a wider context. The latter option equates to a more integrated and value-oriented approach, where cultural heritage is understood as all-inclusive and immovable heritage as ingrained in the very fabric of the historic urban environment.

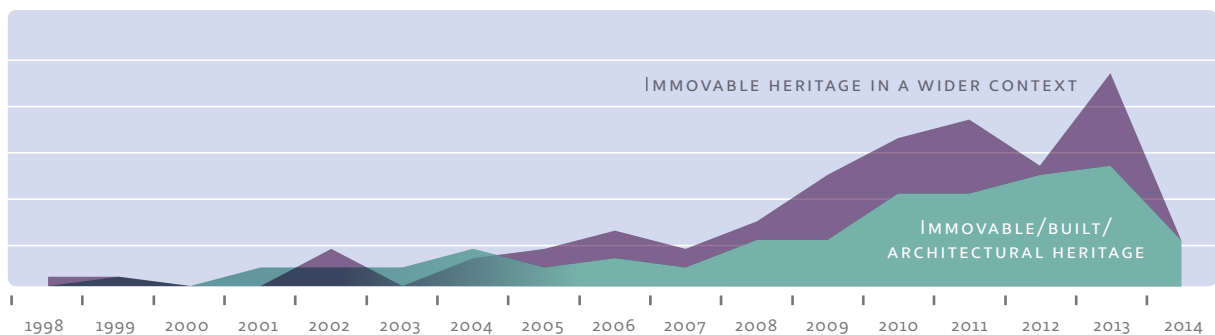


FIGURE 3.1. EVOLUTION OF THE FOCUS OF THE RESEARCH OF THE STUDIES COLLECTED ON A EUROPEAN LEVEL

SOURCE: own, based on the survey results.

The outcome of the mapping suggests that during the past decades the number of studies addressing both topics has increased in a relatively similar way. In line with the evolution towards a more integrated and value-oriented approach regarding heritage, it may be observed that the studies submitted by the respondents use a more holistic approach more frequently than perspectives focused on immovable heritage alone.

3.2.2 THE IMPACT DOMAINS ADDRESSED IN THE COLLECTED STUDIES

As mentioned before, four specific impact domains are used as a common frame throughout the CHCfE project in order to create conceptual links between the macro, meso and micro levels. They were singled out on the basis of a review of international literature dealing with the impact of immovable heritage. The overview provided in the macro level is neither exhaustive nor exclusive, but it shows clearly that different studies use a variety of typologies and terminologies. Typologies of heritage impact and values are at present still continuously being conceived, which suggests that there has been little progress in the field of scientific analysis of these issues (Vandesande, et al., 2014). In theoretical approaches, these typologies are still treated as versions of a “black box” in which all identified values and impacts are stored (Szmygin, 2008). To cope with this black box, a certain classification had to be selected. Keeping in mind that one of the ways culture expresses itself is the presence of immovable heritage in our everyday society, the CHCfE project opted for indicating impact domains that represent the four pillars of sustainable development narrated in the 2013 Hangzhou Declaration. Since this declaration advocates that public policy consider culture as the fourth pillar of development, equal to the traditional economic, social and environmental pillars, the selected typology of impact designates: economic, social, cultural and environmental domains.

Therefore, the questions in the online survey were structured in line with this typology. The respondents were asked on which impact domain(s) the submitted study focuses. Within the obtained data two tendencies may be identified. Exporting the data separately for each impact domain allowed us to assess the chronological evolution of the number of studies in each of the four domains. Whereas comparing the four impact domains makes it possible to weigh their relative importance according to the submitted studies and to understand what their interrelation is.

As the Figure 3.2 shows, the number of collected studies on the impact of immovable heritage has been increasing equally steadily for each impact domain over the past decade. The number of collected studies that address the social and cultural impact of immovable heritage increased slightly during the late 1990s. The most noteworthy difference may be observed for studies related to the economic and environmental impact domain. However, the results of the online

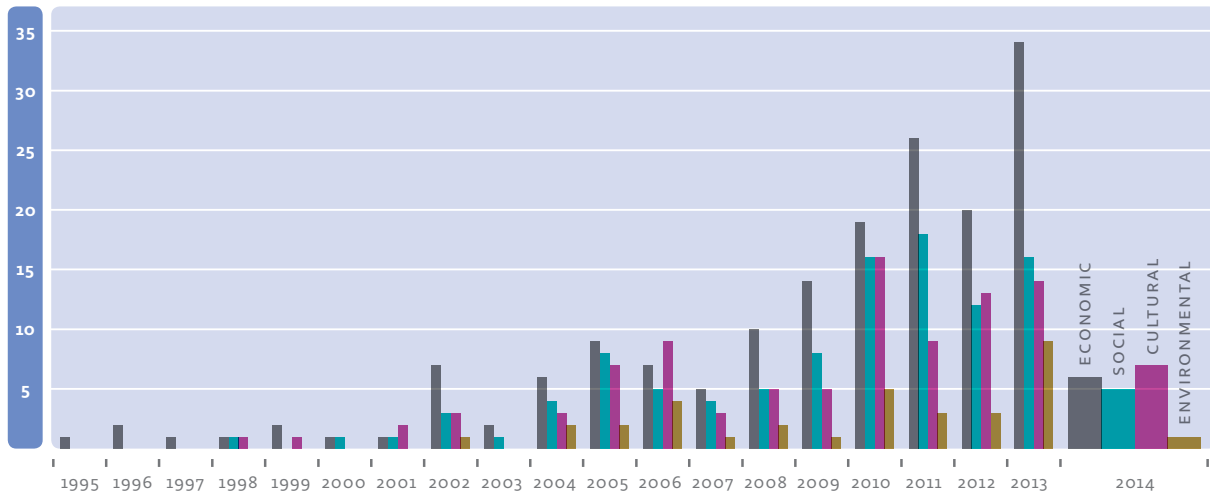


FIGURE 3.2. CHRONOLOGICAL EVOLUTION OF THE IMPACT DOMAINS AS REPRESENTED BY THE SUBMITTED STUDIES

SOURCE: own, based on the survey results.

survey need to be treated with caution. There has indeed been an increase in the number of studies on heritage impact in the EU since *circa* 2000 although the low numbers for the 1990s suggested by the survey results could be misleading. An important factor that has to be taken into account here is the bias caused by the lack of digitalised studies from the 1990s and the language barrier.

In contrast to the other impact domains, there were some very early examples of studies addressing economic impact submitted by the respondents. For instance, a profitability study on the cultural sector in Austria (Poll, 1983), that dealt with the role of tourism as an economic driver, and a study conducted in the city of Diest (Belgium), that divided the economic dimension of the immovable heritage into three main components: the utilitarian one, the recreational one and the social one (De Troyer, et al., 1990). It is worth mentioning that although the authors focussed mostly on quantitative data such as real estate values, they also noted that heritage in a city had an actual influence on its inhabitants but that this non-marketable component was more difficult to estimate due to the lack of suitable qualitative measurement methods that could be quantified. The fact that some respondents submitted early examples of studies on the economic impact of immovable heritage can be explained by noting that during the 1990s, the economic impact of the heritage was the main focus of evaluation studies. Firstly, heritage tourism began to expand as a phenomenon in the 1970s and 1980s with a considerable economic impact (Bull, 1991). Secondly, next to the studies on the traditional 1980s leisure “heritage industry” (Goulding, 2000, p. 835) other contemporary research topics arose, such as evidence of investment value (Scanlon, et al., 1994; Everard & Pickard, 1997) and expenditure gain (Swarbrooke, 1994).

It can be observed that studies related to the environmental impact of immovable heritage that appear in the survey responses are dated from the 2000s onwards. This late growth of their number is in line with the macro level part of the

report, which concludes that during the same period different studies dealing with that topic started emerging also on an international level. Initially, most studies in the environmental impact domain were situated in the field of environmental sustainability studies, including those concerning climate change and energy efficiency. Later on, other perspectives emerged: the contribution of immovable heritage to resource protection (Van Balen & Vandesande, 2013), prolongation of the physical service life of buildings and building parts (Thomsen & van der Flier, 2009), waste-avoidance activity (Cassar, 2009), preserving embodied energy (Power, 2010), and contribution to low carbon cities (Rypkema, 2012, p. 206). Another study that provides an interesting point of view is situated in the field of building information research. Hassler (2009) mentions immovable heritage as producing new insights on reducing the “churn” — i.e. demolition and rebuilding — of the built environment.

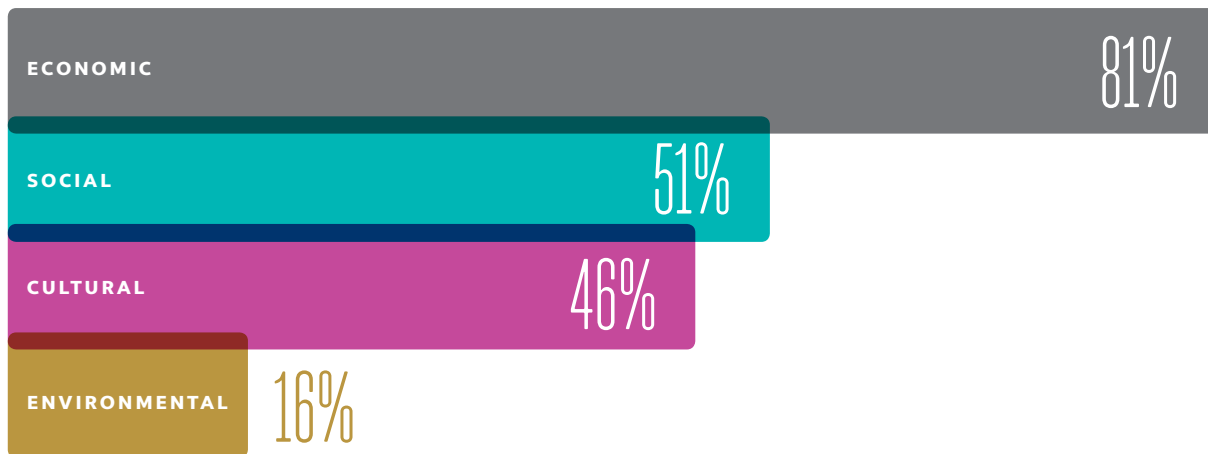


FIGURE 3.3. THE OBSERVED IMPORTANCE OF EACH IMPACT DOMAIN ACCORDING TO THE SUBMITTED STUDIES

SOURCE: own, based on the survey results.

Figure 3.3 illustrates the number of submitted studies concerning respectively each of the impact domains. The economic domain dominates the field of research (81%), followed by the social (51%) and cultural (46%) domains and the environmental domain (16%) being the least present in the responses.

3.2.3 ECONOMIC IMPACT DOMAIN

The large body of the studies dealing with the economic impact of the heritage was anticipated to some extent. As previously noted, this is the impact domain with the longest research tradition dating back to the 1980s. Moreover, an intrinsic link between economy and heritage can be observed. Economics is about managing scarce and non-renewable resources (Ost, 2009). The synergistic relationship between the domain of “managing scarcity” and heritage is generally

acknowledged by both researchers and professionals as it entails preserving heritage values and authenticity, a “non-renewable capital.”

However, arguably the most important factor that explains the substantially larger number of studies on economic impact is related to the private-public nature of immovable heritage and the fact that heritage is part of what economists call public and quasi-public goods or merit goods (see Section 2.5.2). As these goods serve a public interest but would not survive in usual market conditions, the government of a given country takes partial responsibility for them on behalf of citizens through regulations, incentives and public funding allocated to heritage. In terms of such an approach to heritage, its conservation is also clearly an economic choice. As stated by de la Torre, “the influence of economic and business thinking presents a significant challenge to the heritage conservation field” (de la Torre, 1998, p. 1); the large number of studies can thus be partially explained by the need to verify the legitimisation of spending public resources on supporting cultural heritage.

3.2.4 SOCIAL IMPACT DOMAIN

As discussed in the macro level, most attention indeed tends to be attributed to the economic impact of immovable heritage. However, this attitude provoked criticism from the heritage sector as undermining the cultural and social rationale for heritage management and preservation. As a consequence, a new phase has begun to assert itself and this is why, whereas the economic dimension of the cultural sector was the main focus of evaluation studies in the 1980s, the societal function of cultural heritage was increasingly emphasised from the 1990s onwards. This tendency is clearly reflected in the numbers of collected studies, as the first studies submitted date from the 1990s and the graph grows gradually after that point.

Another aspect that should be discussed is the interrelationship of the social impact domain with other impact domains in the collected studies. It may be observed that only 6% of the submitted studies is concerned with both the economic and social domain. This is surprising, as the macro literature review suggests, that especially the combination of the social and economic values of cultural heritage became a distinct topic of interest for different research disciplines at international, national and regional levels (Dümcke & Gnedovsky, 2013, p. 135).

3.2.5 CULTURAL IMPACT DOMAIN

The most frequent combination of two domains that was observed in the collected studies is one regarding the cultural and economic domains, which is represented by 15% of all studies. Moreover, when looking at other interrelations

between impact domains, culture is most often included as an additional one. This tendency may be understood if we take into account that values of cultural heritage also contribute to social impact and they are part of the social capital of a society (Armbrecht & Andersson, 2013, p. 217). Combined with the fact that the heritage research field has a long and well-founded tradition in this specific area, this could explain the relative importance of the cultural impact domain. However, it needs to be noted here that the notion of culture may have been interpreted in different ways by many of the respondents. Considering that culture is a very broad concept, this might have provided the inducement for respondents to classify the impact of a heritage project as cultural.

3.2.6 ENVIRONMENTAL IMPACT DOMAIN

The relative low number of collected studies on the environmental impact domain can probably be explained by the fact that it is, in comparison to studies regarding the other impact domains, a more recent research field. It is noteworthy that not a single study is concerned with solely the environmental impact domain, but they always combine focus on environmental impact with research on one of the other three dimensions. This tendency can also be linked to the shift towards a more inclusive definition of what immovable heritage entails. As noted, there is a clear shift towards the concept of an all-inclusive historic urban environment where immovable heritage objects and experiences of intangible cultural heritage are not separate entities.

3.3 FROM THE FOUR “PILLAR APPROACH” TO “HOLISTIC FOUR DOMAIN APPROACH”

The previous section has already revealed some insights into how the different impact domains relate to each other in the collected studies at a European level. However, the interrelation of all four impact domains has not yet been discussed. To give a short overview, the larger part of the studies (42%) focuses on only one of the four domains, whereas 33% focus on two domains and 19% focus on three domains. In contrast, only 6% focus on all four domains.

This outcome is meaningful and underlines the importance of the need to persuade heritage professionals, researchers and policy makers to acknowledge that the social, cultural, environmental and economic impact domains are fundamentally intertwined. The idea of interconnectedness is logically related to the observed policy/discourse shift that entails a more integrated and holistic approach towards immovable heritage. Furthermore, this intertwined approach was also revealed in the analysis of impact subdomains. As with the analysis on

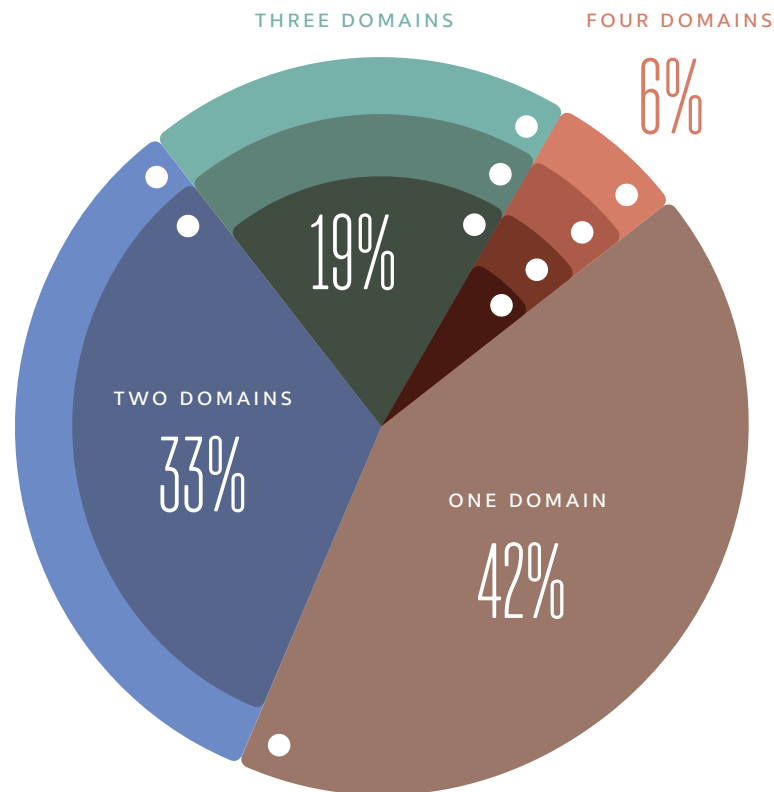


FIGURE 3.4. THE INTERRELATION OF ALL FOUR IMPACT DOMAINS AS IDENTIFIED IN THE COLLECTED STUDIES

SOURCE: own, based on the survey results.

the impact domains, the respondents of the online survey were asked on which subdomain(s) the submitted study focuses. As anticipated from the research conducted in the macro level, many of the respondents stressed that different subdomains have a considerable conceptual overlap and can be classified under more than one domain.

This belief may be illustrated by two suggestive examples. Walton (2013) examines the concept of “responsible tourism” by analysing five case studies of heritage sites located in the UK and in Spain. Not only does the study approach this concept from an economic point of view (i.e. the monetary revenues generated by tourism), it also takes into account the social and environmental aspects, by examining how tourism can have an impact on social life and on the sustainability of our ecological environment. Whereas the research by Orange (2012) analyses the public perceptions on the World Heritage mining sites of Cornwall and addresses how these sites can increase the sense of place and identity on a cultural level as well as a social level. This is because the perceptions of the mining landscapes in Cornwall’s communities are transmitted from one generation to the next, but also because these sites contribute to the feeling of cohesion and identity of the wider community.

In order to map different subdomains identified in the collected studies and to understand how these relate to each other, the diagram originally developed in the macro level will be employed. Figure 3.5 starts from the four pillar typology and visualises the culmination point of acknowledging culture as a system of values and a framework to promote social and economic development and environmental sustainability.



FIGURE 3.5. FOUR PILLAR APPROACH TO SUSTAINABLE DEVELOPMENT

SOURCE: own, based on UNESCO, 2013.

Since the CHCfE project recognises that one of the expressions of culture is the presence of heritage in our everyday society and that heritage is a resource which can enhance social capital, economic growth and environmental sustainability, the holistic four domains approach was developed as the common scheme for the four impact domains of heritage throughout the macro, meso and micro levels of the report.

Keeping in mind that the conceptual model is based on the Hangzhou declaration, it is suggested here that sustainable development occurs when all domains are considered together and all possible logical relations between given domains may occur. Within the Figure 3.6, sustainable development is located at the inter-

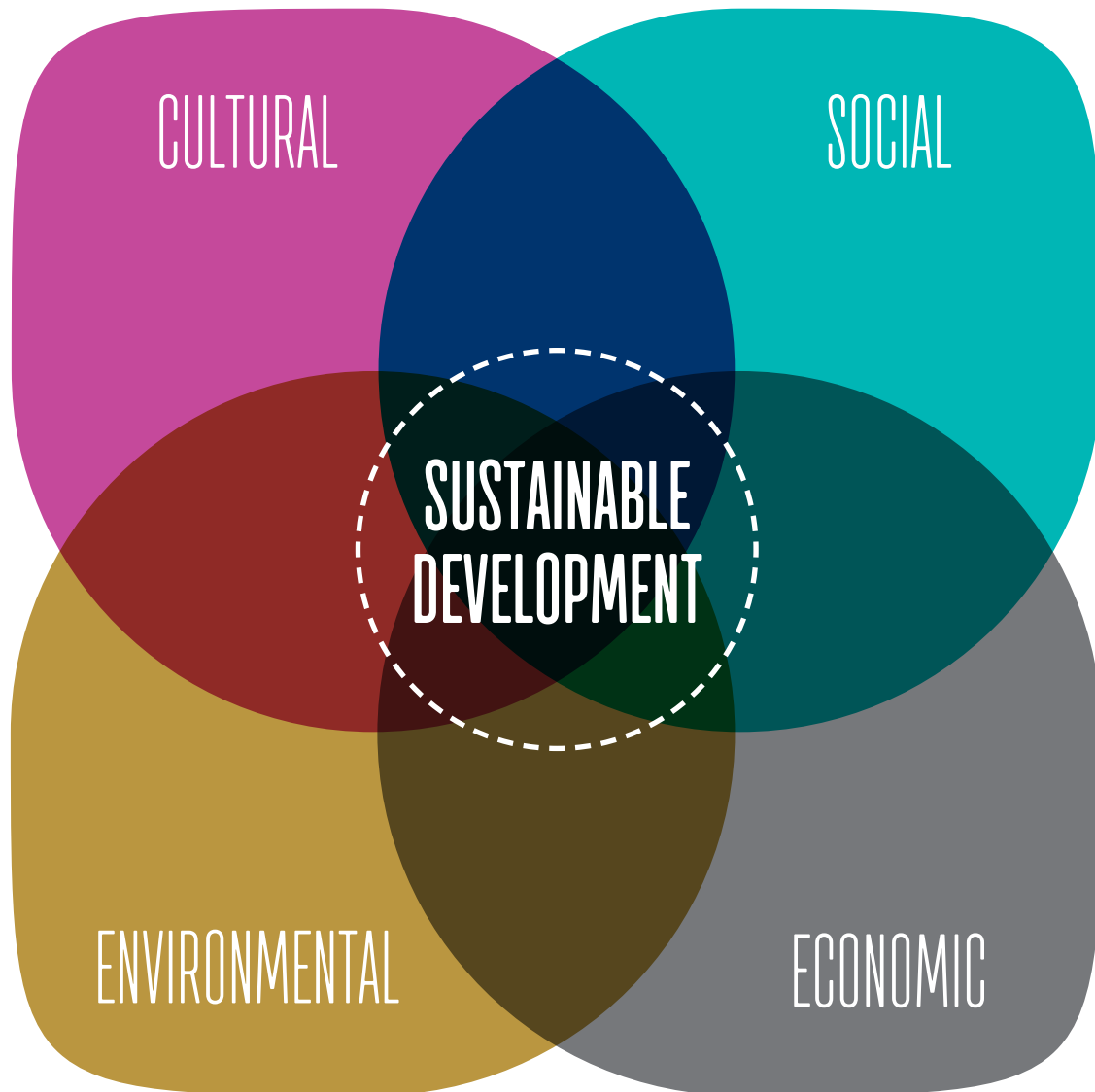


FIGURE 3.6. HOLISTIC FOUR DOMAIN APPROACH

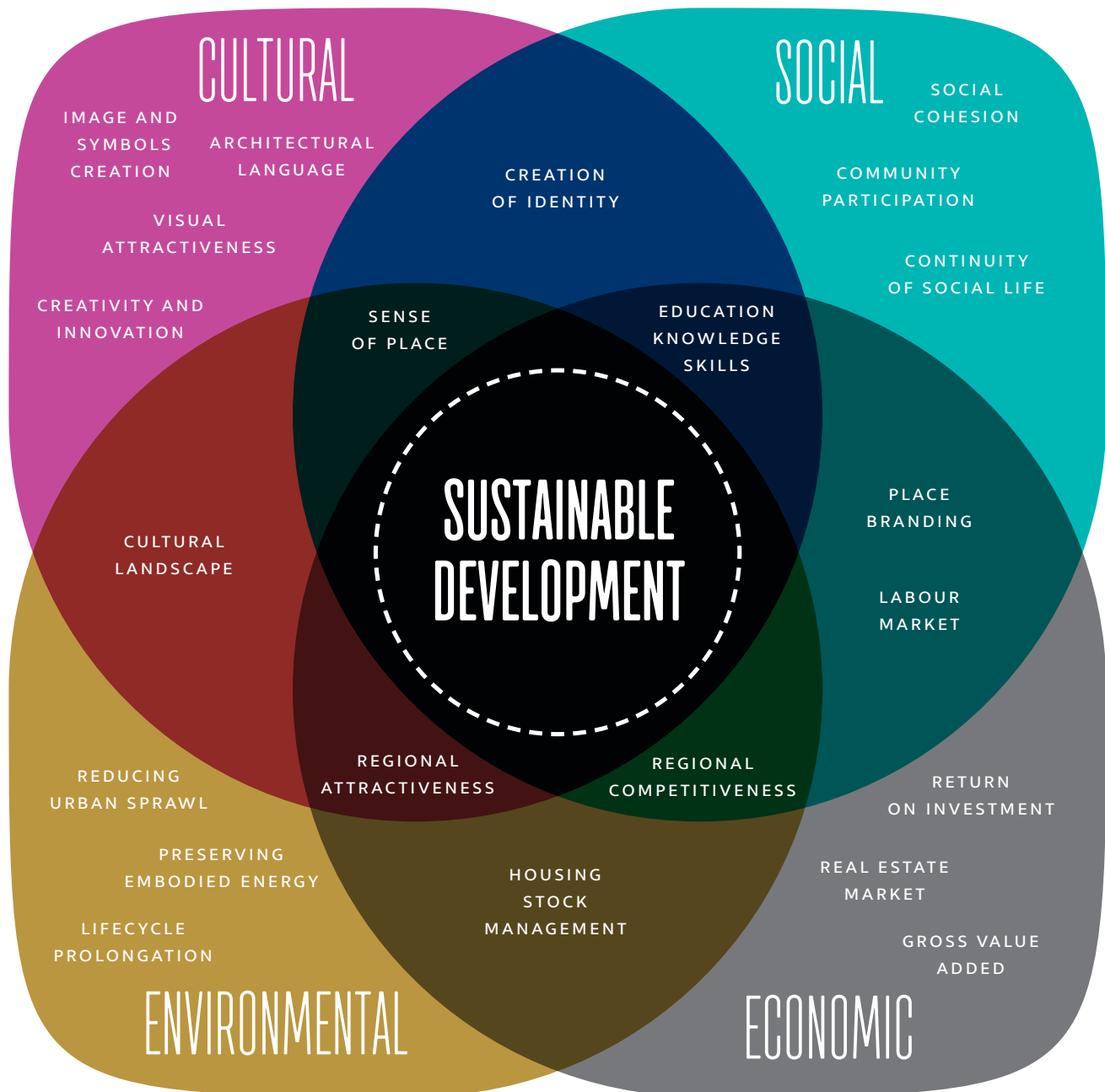
SOURCE: OWN.

section of all four impact domains. This again stresses the need to take on a holistic four domain approach when assessing and dealing with cultural heritage. Solely focusing on sets of two or three impact domains in any heritage assessment, logically implies that the intersection field, i.e. sustainable development, will not be fully represented.

CULTURAL \cap SOCIAL \cap ENVIRONMENTAL \cap ECONOMIC = SUSTAINABLE DEVELOPMENT

By putting differently identified impact subdomains in Figure 3.6, the considerable conceptual overlap could be categorised in a clear and organised way. Moreover, their respective position in the diagram can help understand how heritage actually contributes to the sustainable development (Figure 3.6).

However, as mentioned above, it was observed that only 6% of studies collected on a European level focus on all four domains. This data evinces that currently the three main groups of respondents (public governments/agencies, cultural organisations and research institutions) are not yet addressing the research on the impact of heritage with an integrated approach. The impact of cultural heritage on an environmental level is most frequently absent in the collected



❶ **FIGURE 3.7.** THE DIFFERENT SUBDOMAINS IDENTIFIED IN THE COLLECTED STUDIES MAPPED IN THE HOLISTIC FOUR DOMAIN APPROACH DIAGRAM

SOURCE: OWN.

research. It is recommended that future research focusses on all four impact domains in order to assess and understand the potential of heritage for sustainable development.

Below there are five examples of submitted studies that take on a more holistic approach towards measuring the impact of immovable heritage in the four impact domains.

COMMUNITY HERITAGE AT ENAME, BELGIUM: A STUDY OF BEST PRACTICE

The study by Pletinckx et al. from 2006 focuses on how the exploitation of the archaeological and historical resources of Ename in Belgium from 1983 onwards has had an impact on the town in an economic, social, cultural and environmental way. In order to assess the impact on the different levels, a study of several indicators was conducted: the number of visitors, the number of jobs the heritage creates, the number of visitors of the website of the heritage site, the amount of printed and other media about Ename, the academic coverage on Ename, the number of products using the brand Ename as a base, the number of public activities organised in the archaeological park, the creation of cycling routes, the positive influence on the environment and the revaluation of the townscape of Ename. On the basis of the analysis of these indicators, the study concludes that Ename serves as a remarkable example of how exploitation of heritage assets can have an impact on a town and its surrounding region (Pletinckx, et al., 2006).

THE CULTURAL VALUE OF HERITAGE: EVIDENCE FROM THE HERITAGE LOTTERY FUND

The research conducted by Clark and Maeer in 2008 reviews the outcomes of the heritage projects on the economic, social, cultural and environmental levels. Projects were funded by the Heritage Lottery Fund in the UK from 2005 to 2008. The study implements and develops an evaluation system using the Public (or Cultural) Value Framework, which separates intrinsic, instrumental values (learning, individual well-being, strengthening local community and prosperity) from institutional values (equity and fairness, enhanced trust in public institutions, resilience in the organisations and systems that are funded, and value for money). The overall conclusion of the study is that the cultural value framework can be of great assistance in helping the Heritage Lottery Fund to develop a framework for its research programme (Clark & Maeer, 2008).

ECONOMIC VALUE OF IRELAND'S HISTORIC ENVIRONMENT

The 2012 study by ECORYS assesses the impact of the historic environment of Ireland not only on an economic, but also on a social, cultural and environmental level. The economic impact assessment is structured around three principal components: the economic activity corresponding to core organisations comprising the “inner wheel” of the historic environment sector (organisations whose key function relates to maintenance, conservation, management and/or

creating access to part or all the historic environment); the built heritage repair and maintenance sector; finally, expenditure resulting from tourists attracted to Ireland principally because of the historic environment. Besides analysis of economic impact, the study provides case studies which demonstrate that the importance of Ireland's historic environment gradually extends and makes a highly significant contribution to a range of social, cultural and environmental objectives, such as: formal and informal education, community development and environmental enhancement of historic townscapes (ECORYS, Fitzpatrick Associates Economic Consultants, 2012).

— **DEMONSTRATING THE PUBLIC VALUE OF THE HERITAGE IN THE UK**

The publication by the National Trust from 2006 of the Accenture Public Service Value Model, an analytical tool for quantitative measuring and tracking the levels of public value generated by public sector organisations, presents a possible alternative method to demonstrate the public value of heritage. The tool engages a wide part of society and takes into account qualitative as well as quantitative data to provide a more holistic picture. Indicators which are factored in for the study include the following: the number of visitors, the number of volunteers, the number of school children, and adults' enjoyment from participating in a heritage project. The aim of the model is to focus on outcomes and metrics, in order to make it possible for the sector and policymakers to recognise measures which create value (National Trust and Accenture, 2006).

— **VALUE IMPACT ASSESSMENT OF TATTON PARK IN THE UK**

The study commissioned by the European Garden Heritage Network in 2006 presents the findings of the assessment of the value and impact of Tatton Park in Cheshire, one of the UK's largest historic estates. The research explores the economic, social, cultural and environmental impacts of the park using a combination of qualitative and quantitative data, based on a series of consultations undertaken with stakeholders, a visitor survey, as well as statistical data on the economic impact of the estate. The report concludes with a set of recommendations, drawn upon the results of the consultations and the survey, which suggest how the value and impact of the park might be maximised in the future (SQW, 2007).

3.4 **METHODOLOGIES EMPLOYED IN EUROPEAN RESEARCH ON CULTURAL HERITAGE IMPACT**

— This section discusses the methodologies which are currently used in the European discourse to accurately understand all aspects of the impacts of cultural heritage. A theoretical overview of these methods can be found in the macro level (Subchapter 2.6). One of the questions for respondents in the online sur-

vey regarded the method applied in the submitted study. These methods were classified in three main categories: quantitative, qualitative non-participatory and qualitative participatory methods.

Considering the responses to the survey, it may be concluded that the most commonly used qualitative non-participatory methods in the European research are expert analysis, primary or secondary literature review, case study, multi-criteria analysis and policy analysis, while the most frequent participatory methods in the submitted studies are REAP (or Rapid Ethnographic Assessment Procedure), participatory mapping, cultural mapping, grounded theory, and ethnography. As far as the most popular quantitative methods in the European research are concerned, the survey results list the following: cost benefit analysis, hedonic pricing, travel cost, contingent valuation method, and choice modelling.

Table 3.1 summarises the most popular types of methodologies in the submitted studies. For each of the three categories, five methods were selected. The list is not exhaustive, but those methods were chosen because of their frequent occurrence in the European discourse. The table provides a description of every method and several examples of studies in European literature where that method is used to evaluate the impact of cultural heritage.

TABLE 3.1. THE MOST COMMONLY APPLIED METHODOLOGIES IDENTIFIED IN THE COLLECTED STUDIES

NAME		DESCRIPTION	EXAMPLES OF STUDIES IN EUROPEAN LITERATURE
QUANTITATIVE METHODS	COST BENEFIT	Market-based evaluation technique, used by decision-makers to assess whether a proposed project should be undertaken or not. Cost benefit analysis is carried out to weigh the costs, both financial and otherwise, of a project against benefits which would arise from it (Smith, 2010, p. 13).	EVoCH, 2012 Passamar & Marchetti, 2009 Witteveen+Bos, 2012
	HEDONIC PRICING	Revealed preference method, can be used to measure the effect of the heritage on the land value in various distance from the site. This technique assumes that prices of goods on the market are affected by their characteristics. The estimation of the real estate value and of house prices is based on several attributes like surface, comfort, age, number of rooms, and on a freely functioning and efficient property market (Nijkamp & Riganti, 2004, p. 7).	Ahlfeldt, et al., 2012 Lazrak, et al., 2014 Ruijgrok, 2006
	TRAVEL COST	Revealed preference method, uses differences in travel costs of individuals making use of a cultural site to infer the value of the site (Nijkamp & Riganti, 2004, p. 7).	Bedate, et al., 2004 Fonseca & Rebelo, 2010 Vicente & de Frutos, 2011
	CVM	Stated preference method, estimates total value ascribed by an individual to a heritage site (willingness to pay) (Mason, 2004, p. 17).	Ruijgrok, 2006 Kovač & Srakar, 2013 Iorgulescu, et al., 2011
	CHOICE MODELLING	Stated preference method similar to CVM, but it asks respondents to rank the alternatives, rather than just choose among them (Mason, 2004, pp. 17-18).	Kinghorn & Willis, 2008 Van Loon, 2013

QUALITATIVE NON-PARTICIPATORY METHODS	EXPERT ANALYSIS	Method relying on the knowledge and experience of experts in the field, obtained for example by conducting expert interviews.	Bradley, et al., 2009 Dvořáková, et al., 2011 Echter, 2011 Murzyn, 2006 Pöldma, 2012 Echter, et al., 2001
	PRIMARY/SECONDARY LITERATURE REVIEW	The collection of historical documents and review of relevant archives, newspapers and magazines (primary) or books and journals (secondary).	Csáky & Sommer, 2005 Grazuleviciute-Vileniske & Urbonas, 2011 Grubmüller, et al., 2008 Historic Houses Association, 2010 Tynkkynen, 2007
	CASE STUDIES	Method consisting in providing narrative examples to disseminate information on results of research.	AMION Consulting; Locum Consulting, 2010 Clark & Maeer, 2008 Ebert, et al., 2009 English Heritage, 2010 North East Environment Forum, 2005 Murzyn-Kupisz, 2012
	MULTI-CRITERIA ANALYSIS	Non-monetary evaluation method, takes into consideration the multiple dimensions of a decision problem. Project effects are addressed in their own dimensions and a weighing procedure is used to compare or assess the various project effects against each other (Ost, 2009, p. 90).	Laplante & Throsby, 2011 Ost, 2009
	POLICY ANALYSIS	Determining which of various alternative policies will most likely achieve a given set of goals in light of the relations between the policies and the goals (Nagel, 1999).	Jura Consultants, 2013 Karnite, 1998
QUALITATIVE PARTICIPATORY METHODS	REAP	Method used to examine and describe the relation between local communities and park lands, which can be applied as well in case of the interconnection between communities and heritage sites. In a REAP, a number of methods are selected to produce a dataset that can be triangulated to provide a comprehensive analysis of the site (Low, 2002, p. 36).	BOP Consulting, 2011 ECOTEC, October 2008 eftec, 2005
	PARTICIPATORY MAPPING	Cartographic practice used to examine the relationships between people and the surrounding landscape, it makes use of sketch mapping, participatory 3D modelling, GPS and GIS (Vandesande, 2012, p. 39).	Bazan, et al., 2009 Vamescu, 2008
	CULTURAL MAPPING	Cartographic practice used to document local cultural tangible and intangible resources (Vandesande, 2012, p. 39).	Accenture and National Trust, 2006
	GROUNDED THEORY	Inductive method revealing information on cultural valuation processes, based on interviews and participant observations (Vandesande, 2012, p. 39); (Munhall, 2007, p. 93).	Temel & Dögl, 2007 Orange, 2012 Alberti & Giusti, 2012
	ETHNOGRAPHY	Method employing interviews and participant observations to reveal data on the cultural values associated with heritage (Vandesande, 2012, p. 39; Low, 2002, p. 31).	Hutchison, 2014 Vodeb & Medarić, 2013

SOURCE: OWN.

As the macro level part of the report argued, the best studies are based on a combination of quantitative as well as qualitative, non-participatory and/or participatory methods. The application of a variety of methods in complementary ways enables an assessment to be made of the range of heritage impacts as presented in the typology of impact domains. By combining different methodologies, the particular shortcomings or blind spots in each of these methods can potentially be offset.

As mentioned above, one of the questions for the respondents in the online survey regarded the kind of method the submitted study applied to assessing the impact of heritage. Figure 3.8 illustrates the methodology the surveys relied on: quantitative methods, qualitative non-participatory/participatory methods or quantitative and qualitative methods. The qualitative non-participatory and participatory methods were classified as one category due to their frequent simultaneous occurrence in practice.

The resulting data suggests that, in line with the preferred way of research stated in the macro level, studies relying on composite methodologies, combining quantitative and qualitative data, are relatively common in the European discourse. In the future, more attention needs to be focused on this hybrid, collaborative research to bridge some of the existing gaps in the field.



📌 **FIGURE 3.8.** TYPES OF METHODS APPLIED IN THE STUDIES SUBMITTED IN THE SURVEY

SOURCE: own, based on the survey results.

3.5 SCALE OF THE STUDIES

For each study submitted to the survey, the respondents were asked about the scale of the study: multiple EU countries, national scale, regional scale or cities, or finally individual site or building. The resulting data is represented in Figure 3.9. The largest part (45%) of the studies addresses the impact of cultural heritage on a national scale, followed by 40% of the studies relating to the impact on the scale of region or city.

The results of the collected studies suggest that many of them focus on the level of regions and understand heritage as being ingrained in the very fabric

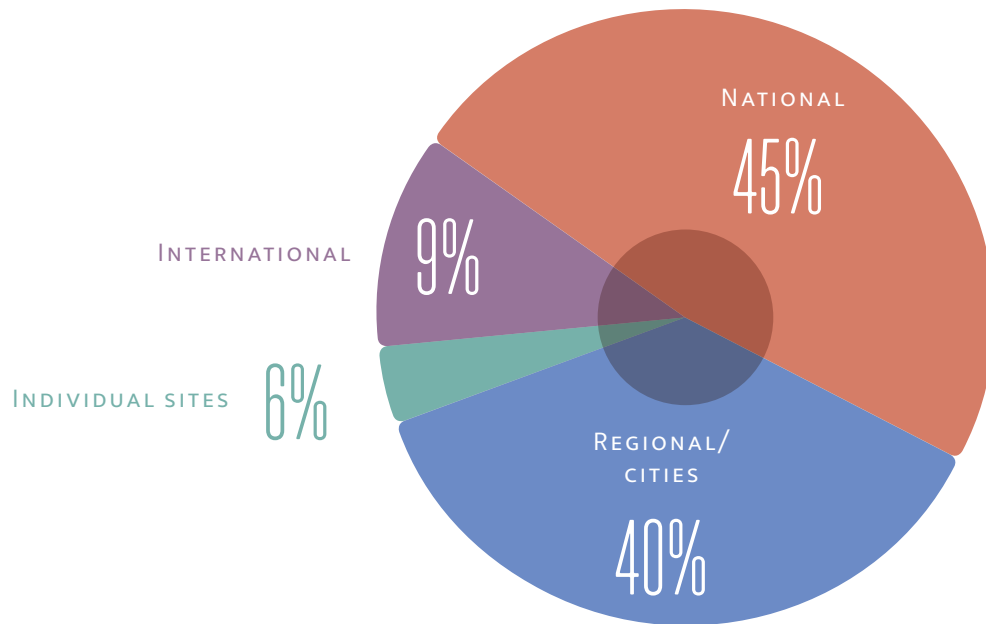


FIGURE 3.9. SCALE OF THE SUBMITTED STUDIES

SOURCE: own, based on the survey results.

of a city. Different international organisations recognise that cities, public places and streets will be crucial in sustainable development policies. Urbanisation is increasing and cities have come to play a dominant role in global development with impacts on the environment, social challenges and economic growth (Intergovernmental Panel on Climate Change, 2007; UN-HABITAT, 2010). They can also serve communities, enhance economic productivity and social engagement, which in turn leads to “place” prosperity.

3.6 RESPONDENT GROUPS

At the beginning of the online survey, every respondent was asked about the bibliographic information of the submitted study. This is how we know that 45% of the submitted documents were published as a report or a book, 28% were published electronically, 25% were featured as an article in an academic journal and 2% remained unpublished. On the basis of this data, the collected studies can also be classified according to three groups of authors: public government or agencies, cultural organisations and research institutions.

Responses to the survey show that studies conducted by public organisations or agencies tend to focus on the economic impact of heritage rather than applying a holistic approach to the subject. As the macro level part of the report already argued, this may be connected to the increasing prevalence of universal scarcity of funds for heritage management and conservation. Policy-makers,

also operating within constrained budgets, therefore tend to look for justification for allocating funds to heritage by attributing socio-economic values to it and by measuring its socio-economic impact. This illustrates the shift towards a more instrumental cultural policy, which has been increasing from the 1990s onwards. This strategy tends to justify public expenditures for culture with the benefits they can provide for the country (Vestheim, 1994, pp. 57-58).

On the other hand, studies conducted by cultural organisations tend to apply a more holistic approach to the impact of heritage, not only focusing on the economic, but also social and, although to a lesser extent, cultural and environmental domains. Studies carried out by cultural organisations are however more inclined to be biased. They tend to take the idea that heritage produces benefits for granted and use this as the starting point of the research, instead of primarily inquiring whether heritage has any impact and if this impact is beneficial or detrimental. It is of course important for these institutions to provide data on the positive impacts of heritage in order to obtain funds for projects in the future.

Studies carried out by research institutions tend to pay most attention to the economic domain, but there has been a trend to apply a more holistic approach to the assessment of heritage impact. Increasingly, the focus seems to be put on a more integrated perspective towards the economic, social, cultural and environmental impacts where sustainable development becomes the goal. In further research, the overall aim should be to obtain a less biased approach and to acquire a balanced proportion of the attention paid to each of the four domains towards sustainable development.

3.7 CENTRAL AND WESTERN EUROPE – DIFFERENCES IN APPROACH TO THE POTENTIAL OF CULTURAL HERITAGE

The history of architectural heritage conservation in Europe is quite well documented (for example: Choay (1992), Jokilehto (1999/2004), Glendinning (2013). As to the early history of architectural conservation in the late 18th and early 19th centuries, architectural heritage conservation is indeed linked to the emergence of archaeology and architectural history as modern scientific disciplines, but also crucial was the use of architectural conservation (and cultural history in general) in politics. 1789 revolutionary France immediately recuperated “le patrimoine” of the Ancien Régime as public property; the State further taking care of “les monuments français”. In post-Napoleonic Europe the identification of national monuments, producing inventory descriptions, their legal protection and further conservation and eventual restoration interventions, played

a crucial role in the process of *nation-building*. Public authorities and state administrations were responsible for selecting historic buildings for protection as *national monuments*. They directed the actual preservation approach towards ideal restoration, constructing an idealised picture of a national past. Architectural heritage experts (from Eugène Viollet-le-Duc to Alois Riegl) actually fitted this political agenda but, on the other hand, nevertheless developed and applied a more balanced and fundamentally scientific approach of an archaeology based conservation and restoration. In economic terms 19th century state politics concerning national heritage fully respected a liberal constitution of a modern nation-state (as is definitely the case in Belgium, considered as the most liberal of them), by respecting strictly private property, left out of state monument protection.

World War I did not immediately change the overall picture: post-war reconstruction seemed even momentarily to reinforce the nationalist perspective, restoring the traditional, historical aspect of devastated historic cities, fully reconstructing its major monuments. But on the other hand, architectural (and urban) heritage conservation unavoidably also became an international issue, leading experts to eventually produce the 1931 Charter of Athens and the 1964 Charter of Venice, to be acknowledged by national states as reference documents for their national policies, i.e. legal instruments. Indeed post-war reconstruction also put architectural conservation — for the first time in its history — into the broader context of urban planning and modernisation (for example Bullock & Verpoest (2011), Bullock (2002)).

Having the above in mind, it can be assumed that the impact of cultural heritage on the domains derived from the four pillar approach (economy, society, culture and environment) is of the same character, regardless of the location of cultural heritage sites. The scale of impact might differ from case to case since, as it has been noted before, in many situations a mere existence of heritage sites might not be enough to trigger their development potential and specific actions on the side of owners; authorities or local communities are necessary to unveil it. There seems to be, however, a clear difference, regarding the interest and number of undertaken studies on potential impacts of cultural heritage, between the Western and Central Europe. The main difference in approaches to cultural heritage in both parts of Europe is very much connected with the political and economic systems after World War II. As Jane Jacobs (1970) has rightly pointed out: the economy of Prague, Krakow, Budapest, East Berlin was after 1945 “arrested”. Therefore, we shall talk about our common European values and dedication to the conservation and protection of heritage as much in Coimbra and Barcelona as in Kosice and Vilnius. At the same time we will have to discuss the fundamental differences concerning the post-war experience of the free market economy (capitalism) in the West versus the command economy (socialism/soviet model) in the East. That difference allowed Western Europe to acknowledge cultural heritage as a pro-development resource much earlier, which probably is responsible for the discrepancy in the number of studies found in the CHCfE project.

EVIDENCE FROM THE FIELD —

3.7.1 INPUT FROM CENTRAL EUROPEAN EXPERTS

In line with the goals of the CHCfE project, 11 experts from Central European countries were invited to contribute to the project by completing a detailed questionnaire on the research in their countries, giving interviews on the main challenges and identifying and reviewing available literature in the cultural heritage field. On October 17, 2014 the Central European Round Table on Cultural Heritage was held at the International Cultural Centre in Krakow with 30 experts from the field discussing the role, potential, and the actual use of cultural heritage in the region. The Central European experts interviewed on the challenges and problems with the research on cultural heritage impact all agreed that there was either a lack or insufficiency of research on this subject. Péter Inkei (Hungary) openly admitted that the search for relevant academic studies had borne very limited fruit:

Consulting experts such as the Association of Cultural Heritage Managers has confirmed the diagnosis: they do not know about academic studies or books written specifically on the impact of cultural heritage; in Hungarian towns, sadly, even basic documents are missing (2014).

In many cases, as Prof. Sergiu Nistor (Romania) pointed out, examination of the field of culture and cultural heritage is a new area of interest for researchers. Moreover, the interest in collecting and objectively interpreting economic and social data from the cultural domain appeared very recently, with respect to the inauguration of sectorial strategies in culture, rural development and tourism, made possible thanks to funding from EU programs.

The new demand for studying the economic and social impact of cultural heritage and for obtaining appropriate data regarding multiple benefits of investing in heritage was stressed also by Dr. Nataša Urošević (Croatia) who considered accession of her country to the EU as one of the reasons of this situation. In this respect she described the accession as “an opportunity to join EU projects, which will allow also for the transfer of knowledge, the use of methodology and good practice examples from the more experienced partners (2014).” This approach seems to be much needed in the region as she emphasised that during her work for the CHCfE project she conducted interviews with authors of existing publications, colleagues from the Croatian Ministry of Culture, Institute for Development and International Relations and Institute for Tourism, as well as academic researchers and experts who were involved in international networks and cultural heritage projects; they all “agree that existing literature (which is scarce and insufficient) does not provide clear and measurable indicators of economic profitability, social and cultural benefits of investments in heritage (Urošević, 2014).” In some countries of the region there seems to be a visible beginning of

change in the approach towards socio-economic potential of cultural heritage. In Latvia, for example, some studies of applied research that could be used for evidence-based cultural policy development were supported with public funds, especially around 2006–2008.

It is an intuitive approach to the impact of heritage that seems to dominate the discourse (especially the public one). Nistor claimed that “it is sometimes admitted that the rehabilitation of the historic centres or listed buildings might contribute to social inclusion and to poverty reduction. Unfortunately, this is not proved by national statistics or relevant case studies (2014).” He also noted:

— *It is frequently stated that culture and cultural heritage has an important contribution to the cultural dialogue between ethnic, religious or minority groups, and that Romania can serve as a model for such an approach. It has never been measured the contribution of the public budgets to this purpose (2014).*

A similar opinion was expressed by Dr. Daniela Tomšič with reference to Slovenia. There are many studies about heritage, its value and significance for the environment and sustainable development, a lot of high-quality research projects and methodologies for urban and other development planning. However, studies on tangible benefits of immovable cultural heritage are rare, which makes proving the necessity of heritage for the sustainable development of society and place troublesome. The majority of academic works take heritage into consideration, but there are no specific studies demonstrating the advantages of it in this respect. In addition, successfully concluded international projects that involve immovable cultural heritage are not supported with studies that demonstrate the benefits in subsequent years (Tomšič, 2014).

Certainly, part of the problem is the lack of statistical data and research methodologies. National statistics offices usually collect very basic information (such as the number of institutions in different fields and sub-fields of culture, attendance numbers, number of exhibitions prepared in a given year, allocations to culture from central or local budget, etc.), often mixing culture and heritage which makes extracting data even more difficult to do. Moreover, organisers of projects and heritage institutions are not used to collecting specific data regarding their performance and potential spillover. Increasing bureaucracy in the public sector that requires public heritage institutions to develop and report on indicators, in order to prove their usefulness for society, does not translate in practice into well-designed methodologies that verify the potential of heritage. These are rather chaotic, fragmentary and *ad hoc* actions stemming from a rapid, market-oriented (and not development-oriented) approach that authorities of some countries seem to be taking with regard to the culture and heritage field.

For example, in Poland no homogenous model of collecting statistical data on heritage has been developed as yet. The existing dispersed data also does not provide adequate material for the analysis of the impact of heritage on society and the economy. In their report on socio-economic impact of heritage, Koziół

et al. (2013, p. 23) note that it would be profitable to develop a methodology of collecting data on cultural heritage, as well as a methodology of estimating its socio-economic impact. They assume that the field of cultural heritage has a specific character and should be treated separately from the field of culture when it comes to impact research. Whilst there are some studies on the impact of culture and the creative industries in Poland, the specific sector of heritage seems to be neglected in this respect.

Similarly, Urošević talked during the round-table about the necessity to develop the methodology of research. In the reviewed Croatian literature only basic indicators are mentioned, such as: number of visitors, annual income from tickets, and revenues from heritage rent; however, they are mostly out of date. The majority of existing studies consist mainly of theoretical considerations regarding important political, economic, cultural, social, and educational role of cultural heritage, but there is no specific data, indicators or evidence measuring the impact.

3.7.2 SPECIFICITY OF “CENTRAL EUROPE”

The specific features of the relation between cultural heritage, development, and economy in Central Europe stem from a particular historical experience of this part of the continent. This situation was made up by several factors: long-lasting feudalism; late nation-forming processes with the emergence of nation states only after the end of World War I; the Bolshevik revolution in Russia; the Holocaust; the scale of damage and looting of art works during World War II; and finally — the post-war shifts of borders and ethnic cleansing on a mass scale. It has to be noted, however, that during the 20th century political borders in Central and Eastern Europe changed faster than cultural borders. Moreover, the almost fifty-year-long “lesson of communism,” as well as the transition processes after 1989 cannot be ignored in an analysis of the complex and specific situation of cultural heritage in Europe to the east of the Elbe.

The latest history — fifty years behind the iron curtain with centrally planned economies — hindered Central European countries from thinking about heritage in terms of a pro-development resource that merited investment in its own right. All these processes and phenomena, as well as many others, determined and still determine in a significant way both the relation between development and cultural heritage and the economic dimension of these areas (therefore, obviously, this must be reflected both in theory and practice of treating cultural heritage as catalyst for socio-economic development). Although 1989 did not change this attitude in a very substantial way, over the years the approach to heritage has been changing, with the accession to the EU marking a break-point. Benefiting from the EU structural funds meant that both central and regional authorities, as well as the direct beneficiaries of the funds, needed to rethink the role culture heritage can play in socio-economic development in order to

justify their project ideas in the applications for the mentioned funds. Still, given the amounts of money directed from the EU funds to Central European culture and heritage, there seems to be surprisingly few convincing studies presenting the impact of heritage projects, even those co-funded by the EU.

There may be no doubt that culture, including cultural heritage, has succumbed to the classic syndrome of the transition period since the fall of communism in Central Europe. At the same time, as most countries of the region were undergoing the difficult process of transformation, the culture and heritage sector was still perceived, as it had been traditionally, as a burden on the budget, not as a catalyst for change. The still very much alive Marxist dogma of the non-productivity of culture remains a hindrance and a constraint today — reinforced by the stereotype of the “gang” of public institutions constantly begging for pennies from the public purse. With the fall of communism and the beginning of the transformation process, the culture and heritage sector gradually have become politically side-lined. A characteristic feature of this process was the weakening position of successive ministers of culture within the government and the lack of a cohesive strategy in state cultural policy in various countries of the region. This has aggravated the lack of symmetry between the transformation of the state and its decentralisation on the one hand, and the increasingly anachronistic model of national culture management on the other — all the more so that the existing, old model and scope of state patronage of culture has become less and less suited to the change in civilisation that we experience today.

It is very telling that changes that have taken place in the culture and heritage sector, in many countries of the Central Europe, since 1989 have not come as a result of the internal evolution of the sector but above all as a function of external reforms, including changes as fundamental as the democratisation of the state, local government reform, decentralisation, privatisation, changes of the taxation system and European integration. In case of the new political class in many of those countries any interest in culture was largely restricted to successive attempts to treat culture instrumentally, for instance to make it contribute to a new state ideology. For right-wing parties in many post-communist European countries culture and heritage are convenient tools for playing on national emotions. This attitude essentially achieves little more than the petrification of the old model of state patronage, which is a legacy of the previous age (Purchla & Palmer, 2010).

To understand the problems behind the Central European approach to cultural heritage, attention must be brought to several contemporary issues specific to the region. One of them is the problem of ownership and re-privatisation in the countries of the region. At present it is one of the most important issues related to cultural heritage and solving it is often the key to effective protection of heritage. The current situation is directly linked with the fact that for fifty years of communism, after World War II, historic monuments of Central Europe were lacking what the fourth article of the Venice Charter defines as “maintenance”:

“It is essential to the conservation of monuments that they be maintained on a permanent basis” (ICOMOS, 1964). The lack of maintenance concerned both the damaged cities, like Warsaw, and the ones that were well preserved, such as Prague or Krakow. It also affected the heritage of landowners’ culture, which became a victim of rural reform. What is of key significance today is to radically change “the terms of trade” after 1989.

The beginning of the political transition in the countries of Central Europe in 1989 brought two types of change in the system of cultural heritage protection. The first one involved the basic elements of the political-economic-legal system. Whilst there was a relatively small number of these elements, the changes introduced were preceded by a critical analysis, they were planned and controlled throughout the process of implementation and as a result were realised relatively thoroughly. The second type, much more frequent, involved transformation enforced by the changes of the first type – they were not preceded by analysis, lacking a plan, control and coherence. Elements that created the system of protection of historic monuments belonged to the latter group, which meant that changes in the system of protection of monuments involved more adaptations and consequences, rather than a planned and controlled process.

It needs to be emphasised that the changes of given elements that created the new system of protection of heritage did not proceed with the same pace. First, there are “enforced” changes, stemming from the adaptation of new political foundations and remaining under strict surveillance of the conservation officers. Over time, all elements creating the professional system of protection must reach accord with the foundations of the new political system. In other words, the new political and economic system finds its reflection in all fields, so that it also creates a kind of new structure for the new system of heritage protection (Purchla, 2008). The essence of these changes is illustrated by Table 3.2, examining the example of Poland.

📌 **TABLE 3.2.** CRITERIA OF COMPARISON OF SYSTEMS OF HERITAGE PROTECTION IN POLAND

CHARACTERISTICS OF THE SYSTEM (CRITERIA OF COMPARISON)	PRESENT SYSTEM (AFTER 1989)	PREVIOUS SYSTEM (BEFORE 1989)
FORM OF OWNERSHIP (DOMINATING AND PREFERRED)	Private ownership of historic monuments	State ownership of historic monuments
RESPONSIBILITY FOR MONUMENTS	Responsibility for maintenance rests (by law) on the owner and the user	Responsibility for maintenance rests on the state
FINANCING MONUMENTS	Financial responsibility for the protection of monuments and for research rests on the owner (private)	Financial responsibility for the protection of monuments and for research rests on the state

<p>① STATUS OF A HISTORIC OBJECT</p>	<p>Monuments are treated in a commercial way — protection of monuments is seen as an investment</p>	<p>Monuments are not treated in a commercial way — protection of monuments is not seen as an investment</p>
<p>THE POSITION OF CONSERVATION OFFICE</p>	<p>Conservation office is dependent (it works within the structures of regional government)</p>	<p>Conservation office realises the central policy of the state</p>
<p>THE ROLE OF CONSERVATION OFFICE</p>	<p>Conservation office is passive — initiative depends on owners and investors</p>	<p>Conservation office is active — it defines the form of preservation of monuments</p>

SOURCE: Purchla, 2008, p. 8.

Where, then, does the essence of the changes that appeared after 1989 lie? The shift after 1989 consists in the change of the rules of the game, including those concerning heritage in the entire Central and Eastern Europe. At present, a historic monument is not only sacred, but it is also a “product,” more and more often an object of market speculation as it is clear in many city centres. There has been a noticeable rapid shift from a static model of protection and an equally fast realisation that everything related to heritage protection — especially in large historic cities — is a minefield, a zone of contention, where new actors operate, mostly private owners and local officials.

As a result of political transformation the heritage of Central Europe had to face new challenges and new threats. Rapid privatisation, commercialisation and commodification of space constitutes important aspects of the change that we experience at present. It might be said that the direct link between cultural landscape and the economic and social system is especially clear in the period of transformation, in this moment of transition when the rules of protection are still governed by old instruments, but, at the same time, the reality is already new. The first symptom of this process was a sudden explosion of aggressive advertising in cities, against which conservation officers were often helpless. It is a sign of the change of ownership and the return of mechanisms of private property, as well as a proof of the collapse of the previously dominating rules and instruments of protection. In a way, the latter were more effective in a system based on economic stagnation and total control. At present, they do not stand up to the test of what is needed, especially when confronted with the new dynamics of life.

The most important phenomena that determine the problems of cultural heritage in Central Europe today include, among others:

- the rapidly intensifying process of the changes of architecture resources (housing stock), which means a growing pressure of economic demands on the cultural landscape;
- the growing demand of heritage, which stems from globalisation and a significant growth in the economic role of tourism;
- the shifting of priority from the value of heritage to the needs of society; this change of the way heritage is treated can even be defined as a change of the ontological status of heritage (Purchla, 2012, pp. 72-74).

3.7.3 SPECIFICITY OF 'WESTERN EUROPE'

The Charters of Athens (1931) and Venice (1964) implied broadening the terms of what was understood as architectural heritage beyond the regular national monuments (such as individual monumental buildings like palaces, town halls, and churches) to also cover urban ensembles and cultural landscapes, including also less grand and more domestic architecture as well as legally protecting private heritage properties. In Western Europe that was even more evident after World War II, encompassing early 20th-century social housing, 19th-century and 20th-century industrial architecture and infrastructure works as well as late-modern architecture of the 1950s and 1960s. It also resulted, as a consequence, in government architectural heritage policies, having much broader social and economic impacts involving more complex decision making (leading eventually to introducing public participation), and to increasing heritage budgets. The post-war welfare state most certainly brought about a real heritage economy, managed top-down by the state. Further economic data has to be collected and analysed, however, to define with any precision its scale, structure, evolution and impact both on the global economy and on heritage valorisation itself.

The overall recent political evolution in state economics in Europe towards neo-liberalism (e.g. Belgium and The Netherlands) very much risks undermining traditional government policies on architectural heritage preservation, as practiced in the second half of the 20th century. It shows an increasing disengagement of central authorities in these matters (except for national monuments, now increasingly called "of general interest" even if nationalist argumentations are still present, e.g. in sub-national regions like Flanders and also post-communist countries of Central Europe). It also shows a shift of political responsibility to local authorities. This transfer of heritage responsibilities and power of decision to the very local level could increase the social basis of heritage policy, giving it stronger public support. But on the other hand, local politics can be more vulnerable to pressure to comply with particular, private interests and to be influenced directly or indirectly by strong economic players (such as real estate developers, mass tourism) at the local level. Furthermore, due to present austerity measures and budget restrictions (also transferred to the local authorities) heritage preservation is more often not necessarily an economic priority in terms of public policy priorities (with tourism destinations like Bruges, Venice or Amsterdam being the exceptions proving the rule?). In this respect the situation in Western Europe may not be so different from that in post-communist former Eastern Europe. The main challenge now is to redefine the heritage economy to reflect and respond to the new economic context so as to keep or to re-establish heritage preservation as a public affair of general interest to society, both in economic and socio-cultural terms.

3.8 OVERVIEW OF SUBDOMAINS OF IMPACT BASED ON THE COLLECTED STUDIES

The analysis of the collected studies and reports on a European level provides an insight into the complexity of the potential impact of cultural heritage on economy, society, culture and environment. The intrinsic overlap of the four different impact domains has already been elaborated on in the macro level. In order to deal with this overlap and consistently provide the insights and results of different studies conducted on a European level, it was opted to identify a number of subdomains of impact. These subdomains reflect the most reoccurring topics and trends of the studies that were collected through the online survey as well as via desktop and library research. The different subdomains will be discussed in the following alphabetical order:

- aesthetics of a place and image creation;
- built heritage and the real estate market;
- education, skills and knowledge;
- environmental sustainability;
- identity creation;
- labour market;
- regional attractiveness and competitive advantage;
- return on investment, tax income and GVA/GDP;
- social cohesion, continuity of social life, community participation.

Throughout the next sections the individual subdomains will be clarified on the basis of selected examples examined by collected studies, which vary greatly in terms of scope, geographical scale and depth of research — some of them are very narrow and limit their scope to particular buildings, others are cross-sectional or present an in-depth analysis of case studies.

3.8.1 AESTHETICS OF A PLACE AND IMAGE CREATION

Symbolic value is one of the most vaguest categories of impact but at the same time it is the most frequently mentioned. Key monuments in historic cities often become landmarks widely exploited by local promotion offices, tour operators and marketing specialists. Those buildings (or constructions) draw the attention of tourists and play an important role in shaping national and transnational imagination. They build local pride. Every city has or is struggling to have an iconic building. It may be either a historical building of great significance or

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a contemporary construction that gains a status of heritage with the passage of years. Paris as one of the world-famous cities of culture has a number of symbolic buildings — Louvre, L'Arc de Triomphe, Sacré Coeur, Tour Eiffel, Centre Pompidou, etc. The last one is an example of a new heritage (it is a matter of dispute both in academies and conservation offices how much time has to pass before a building could be addressed as heritage). Warsaw on the other hand is seeking a contemporary icon that would overshadow an iconic building of the Communist era — the Palace of Culture and Science. This role was supposed to be attributed to the new building of the Museum of Modern Art — to be built at the footsteps of this giant edifice. Due to the turmoil over the selection of the winning design and difficulties regarding its realisation, the selected architect was dismissed and the new architectural competition did not include the mission for creating a symbol of Warsaw any more. The role of iconic buildings within cities is thoroughly discussed by Jenks (2008). He focuses on new buildings, e.g. the Guggenheim Museum Bilbao, but makes numerous references to buildings that can already be perceived as heritage. Heritage buildings play an important role in upgrading (or keeping) the aesthetics of the city and often simultaneously contribute to image creation and identity.

CREATION OF A SYMBOL

An example of creating a local symbol while using cultural heritage as the source of inspiration can be found in the case of the regenerated cultural heritage in Pécs, Hungary. Up to the 1990s the cultural significance of Pécs was not at the fore, with the city being perceived as principally an industrial centre. The closing of the coal and uranium mines that had generated the city's main revenue left vast areas of post-industrial sites in need of regeneration. Moreover, as a result of the city's demilitarisation, its military bases were closed, leading to a significant change in the city's character and landscape. In order to build up the position of the city, the local authorities began to invest in education (the University of Pécs had become the largest employer of the region by 2000 (Trócsányi, 2011, p. 272)) and culture (as expressed in the city's application for the title of the European Capital of Culture in 2010). One of the main points of the successful project was the creation of a cultural quarter in the area of the historic ceramics factory of Zsolnay. The quarter is of unquestionable historical value, as reflected in the literature:

— *The buildings, richly decorated with statues, fountains, and vases — all products of the factory — and the Zsolnay Mausoleum represent one of the most successful periods of Hungarian visual culture. Restoring them to their original condition is the imperative duty of the grateful succeeding generations (Komor, 2007, p. 77).*

Trócsányi indicates that due to the historical value of the entire plant and the significance of the factory for the development of the city, it represents an important symbolic value:

- *The creation of the Zsolnay Cultural Quarter, presently the largest brownfield cultural investment in Central Europe has been a central element of the project proposal. The factory itself is an emblem of the city: symbol of the gone, but still memorable development of the modern age (Trócsányi, 2011, p. 275).*

The regeneration of the factory quarter had an impact on the strengthening of the “Zsolnay” brand and made it recognisable not only for the inhabitants of the city, but also for tourists. It is supported by the following extracts from the literature:

- *New cultural institutions and venues placed formerly neglected districts of the city not only on their mental, but also on the cultural maps of both dwellers and tourists (Trócsányi, 2011, p. 282).*
- *The Zsolnay cult is obviously present in the town. Every event that has any connection with the Zsolnay name attracts great public attention regardless of whether it is something related to the factory, the family, the restoration of the statue, an unexpectedly found object of art, etc. There is an obvious interrelationship between the identity of the town’s population, their quality of life and readiness to take action. The project can significantly strengthen this impact of the Zsolnay cult (Komor, 2007, p. 80).*

Those changes also contributed to the creation of immaterial value, referred to as the “genius loci,” “energy” or “atmosphere” which is directly related to attractiveness and image of a place:

- *The genius loci is irresistible here, emanating from the fairy-tale buildings and the statues in the garden (Komor, 2007, p. 77).*
- *The heritage management, but also post-modern style oriented reconstruction of the complex of great industrial traditions can bring new energies to the easternmost periphery of city centre (Trócsányi, 2011, p. 275).*
- *It is not the architectural significance that makes the factory a special place. It is the group of buildings that creates unique, local atmosphere. Our aim is to preserve and restore this (Rádóczy, 2007, p. 74).*

Zsolnay Factory is just one of the examples, reflected in the literature, of building a place’s image and attractiveness with the help of heritage. Research conducted by Murzyn-Kupisz on the impact of renovation of historic sites and their adaptation for new functions on local development, based on the example of the Valley of Palaces and Gardens in Kotlina Jeleniogórska (Poland), confirmed the significance of heritage for creating the aesthetic value, the symbolic value of a site and, consequently, its attractiveness for visitors. Murzyn-Kupisz selected for her analysis the area of Lower Silesia that is known for its numerous residential complexes and a great number of palaces transformed into hotels (8 in 2009). The research on impact of this heritage was based on interviews with visitors of the hotels, statistics and the author’s own analysis. The author of the report states that as a result of the adaptation and conservation project there could be seen

- *a general improvement of the appearance of a town where a given palace is located. A well-maintained palace works as an example of taking care of one’s property, while*

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the groomed gardens around it may inspire neighbours to improve and maintain their own gardens. The possibility of living in the vicinity of a well-maintained palace or in a town known for its renovated palace can be seen as an asset, attracting new residents who appreciate the beauty of local landscape. [...] In the towns in question the renovation of the most important historic monuments, such as palaces, contributes to their being newly recognised as main symbols and markers of the image of a given place (Murzyn-Kupisz, 2012, p. 256).

IMPORTANCE OF AESTHETICS

Revitalisation projects bring back functionality of given sites or quarters often by means of changing their function. This aspect was addressed for example in the research entitled “The Revitalisation of Polish Towns as a Means to Preserve Material and Spiritual Heritage and as a Factor of Sustainable Development”, conducted in 2007–2010 by the Institute for the Urban Development in Krakow. It produced a 12-volume series of publications. The volume containing the diagnosis of revitalisation projects in Poland suggests that:

— *in some of the town centres the quality of the existing public spaces has been improved or created anew, which was realised mainly by the renovation of the so-called living rooms of towns, represented by the historic urban complexes. [...] What should be seen as an advantage of Polish towns is the successful restoration of historic town centres with their historic elements. Today, most of these areas and objects are used as cultural attractions, constituting an important element shaping the quality of life of local inhabitants and boosting the towns’ attractiveness for tourism, as well as improving the general image of a town (Ziobrowski, 2010, p. 187).*

There are studies that present peoples’ opinion on the historical fabric of cities which are illustrative of their appreciation. In 2010, the Public Opinion Research Centre in Poland conducted a research project entitled “Opinions about Architecture.” 82% of respondents declared that they were interested in the appearance of public space where they lived and 95% said they liked looking at well-maintained old, historic buildings (Pankowski, 2010, pp. 1, 3). To the question: “What should be done with old historic buildings if they are in poor condition — they are very neglected?”, the majority of interviewees replied that they should be renovated and 33% of those respondents said that all old buildings should be renovated regardless of cost, for historic architecture should be taken care of because we do not have much of it; 30% claimed that renovation should only be undertaken if the costs are not too high, for example lower than the cost of erecting a new building of similar function; while 25% said that only buildings such as churches, town halls and old palaces should be renovated, while residential buildings should not, unless someone has money to do so. Opinions were confronted with the results of similar research conducted in 2003 — despite the seven-year gap the outcomes are comparable (Pankowski, 2010, p. 12).

Historic and aesthetic values are also addressed by research conducted by Michelson on historic city centres in Hanseatic League cities, which are on the UNESCO World Heritage List. The main part of the analysis concerns Tallinn and Bruges. Study was based on 36 interviews conducted in the years 2011–2013 among managers, artists and residents who constituted a range of agent groups encompassing a well-balanced representation of activities in fields of business, local-specific business in particular, culture, local government and residence. The author examines the perception of the renovated historic facades in given cities by the respondents and claims that these elements of heritage can work as a source of pleasure:

- *Professionally restored facades are seen as (re)creating the pleasure of the public heritage space in the spatial practice of the local people and tourists. Therefore, the agents clearly perceive their role in contributing to the (re)production of quality heritage space; thereby, potentially (re)creating aesthetically pleasant tourist experiences at the destinations (Michelson, 2014, p. 123).*

Whereas examples of restored architecture improve the quality of urban space adding to its prestige:

- *Departing from the research material, it could be asserted that carefully restored buildings improve the quality of heritage space, and the greater availability of heritage buildings for public use enabled through multifarious socio-economic activities reinforces the (re)production of representational spaces associated with the Old Towns and the heritage value through the spatial practice of local people and tourists (Michelson, 2014, p. 124).*

The aesthetics of heritage (in conjunction with other factors) may also lead to negative impacts. Murzyn (2006) researched in detail the historic Jewish quarter of Krakow — Kazimierz, which has been transformed in recent years into a cultural, entertainment and night life neighbourhood. The revitalisation of the quarter is analysed as a multidimensional process that contributed to the restoration of architecture, changes in the spatial structures, their functions, social aspect and the image of this very problematic space. Apart from numerous positive aspects of regeneration of the district (some discussed below), the author also points out negative features. Referring to the boom of places related to entertainment and gastronomy that flourish in the area, she notices that “Kazimierz might soon become so artificially pretty, crowded and noisy that it will lose its uniqueness and charm. In that case, its admirers seeking an aura of mystery and oblivion might even move to another quarter” (Murzyn 2006, p. 382).

HERITAGE-LED IMAGE CREATION

The attractiveness of the place and creation of its image are at the same time related to culture and tourism. The attractiveness of the place is a recurring topic in the aforementioned publication by Murzyn. The author conducted a survey focussed on the image of Kazimierz among different groups. It suggested that, for example, students — a group that had not been familiar with the quarter's previous negative image — associated it with heritage and culture:

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- most often [they] associated Kazimierz with the Jewish culture and heritage (73% of respondents), then with culture, leisure and nightlife (37%). The quarter is perceived as historic and rich in monuments (20%), boasting a unique atmosphere (18%), yet, as socially and physically degraded (20%) (Murzyn, 2006, p. 420).

Murzyn analysed also the image of the quarter in literature. She emphasises that it has changed in the course of the years 1989—2004. In mid-1990s Kazimierz attracted the attention of the media and guidebook publishers “as a reviving, trendy, interesting and artistic place. This led to a visible increase in importance and position of Kazimierz in the overall image of Cracow, and created a fashion for visiting the quarter” (p. 434). The image of the quarter was presented as composed of historic monuments, as well as non-material heritage, which all form an exceptional atmosphere, the magic of the place, very different from the Old Town: “unique, special and magical quarter, yet more laid-back and relaxed than the city centre of Cracow. Its charm and genius loci, Jewish heritage and bohemian atmosphere are often emphasised” (p. 434). Murzyn mentions also the negative impact of the new attractiveness of the quarter experienced by local residents: “the residents are more visibly pushed out of the most important and attractive interiors and urban spaces” (p. 370). She also points to conflicts that divide particular groups of interest. Kazimierz was designed as the second, after the Main Square and its surroundings, cultural city centre, yet it is powerfully burdened with social problems. Murzyn supports her research conducted in various institutions and organisations and through interviews with residents, with the words of a participant in a literary contest organised by the quarter’s community centre:

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- *I have never thought about it much — and neither did most of my friends — that I live in a “fashionable” quarter and historic buildings surround me. For people from KAZIMIERZ, to whom I belong, it is difficult to notice the beauty and the historic value of this place. Their life concentrates around different, probably less sublime matters [S. Kłosowska] (Murzyn, 2006, p. 374).*

Another example of heritage contributing to the image of a place can be found in the research by Michaelis-Winter and Ruland (2007), who sought to determine whether there is a verifiable link between the protection of the urban architectural heritage and the general positive trend in tourism in Eastern German cities since the 1990s. The study underlines the importance of the positive immaterial and indirect effects of the protection of the architectural heritage in cities. These are for example higher prominence of the city, positive image production, attractiveness for citizens and investors, etc.

ATTRACTIVENESS OF INDUSTRIAL HERITAGE

A relatively new phenomenon in the field of assessing the attractiveness of heritage is the popularity of industrial heritage. Buildings that until recently were the site of heavy and light industry have been converted to serve new functions — cultural and commercial — and adapted into office and dwelling spaces. Those

buildings often offer a unique atmosphere and become places of interest. This may be illustrated by the example of the city of Łódź which is filled with historical factories that have been adapted for various new functions. It is a centrally located Polish city, industrialised in the mid-19th century and gradually losing its importance as a textile producer in the second half of the 20th century. The attractiveness of the city stems on the one hand from its Art Nouveau heritage and on the other from its post-industrial nature. In 2002 a representative sample of residents were engaged in a survey within the framework of the project “The structure and the conditions of social bonds in peripheral cities of Central and Eastern Europe in the era of challenges of globalisation.” A part of the research, that presented Łódź in the light of the opinions of its residents, included references to the city’s main street, Piotrkowska, with its Art Nouveau architecture, prestigious and glamorous image and the lively promenade, as well as references to the particular atmosphere of the city. 17% of respondents listed the city’s aesthetics and exceptional climate as the reasons for the satisfaction of living in Łódź (Michalska-Żyła, 2009, pp. 138, 141).

The attractiveness of industrial heritage, related to branding, was studied by Kronenberg (2012) in Łódź in 2007–2009. His research was conducted among three groups of respondents: tourists visiting Łódź, local residents and experts. The author claims that due to the limited size of samples in given groups the results are not representative, yet they allow for distinguishing certain patterns within particular groups. The research that targeted tourists revealed that they were mostly interested in industrial heritage (62,7%). The motivations for the visit included:

— *getting to know the history (most of all of the city or region, to a lesser extent the history of a given object), the atmosphere of the place, and learning about obsolete technologies; simultaneously (within the group of individual tourists) only several respondents stated that their visit to a given site was determined by “the interest in old factories” or “interesting architecture of a place.” This may indicate that industrial heritage is appreciated for its new functions, such as cultural venues (museums, art galleries) and venues for history-related displays (Kronenberg, 2012, p. 163).*

62% of tourists declared that they were interested in industrial heritage, while 79% that this heritage had a positive impact on the attractiveness of Łódź as a tourist site. The author explained the difference in results in the following way: “even if they are not interested in the subject themselves, they do realise that Łódź is a city with a large number of sites of this type and that it can positively boost its attractiveness for tourists” (p. 164). The inhabitants of Łódź expressed smaller interest in industrial heritage — 40%, yet as many as 80% asserted that industrial heritage had a positive impact on the attractiveness of the city (pp. 164, 166). The same number of respondents stated that the closed industrial plants should be preserved and restored (p. 168). Whereas experts (persons with professional interest in industrial heritage and tourism) indicated the reasons for tourists’ interest in the industrial heritage of Łódź. They listed the following rationale:

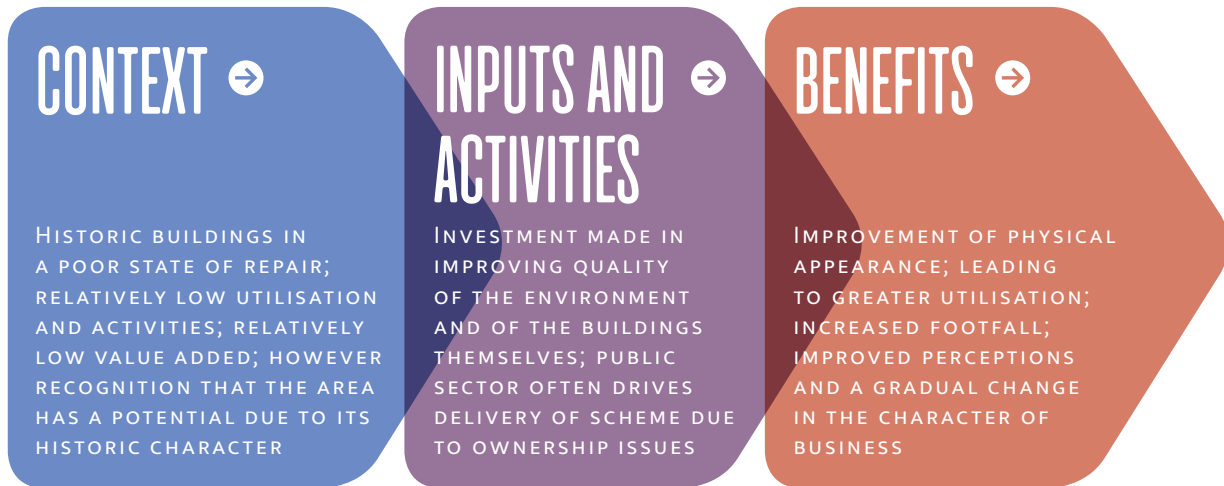
- the will to get to know architecture, its history, and its exceptional character;
- the scale of buildings, their size, and great number, as well the existence of entire sets of buildings including both production plants and the supporting infrastructure;
- the fact that the interior of an old factory is something unknown, and hence interesting [...];
- the interest in technology and industrial architecture;
- interest in the history of people who created factories (museums in factory owners' homes);
- the uniqueness of the heritage of Łódź;
- the unique character of such places and the co-existence of various functions [...];
- success of already carried out revitalisations, most of all Manufaktura (Kronenberg, 2012, p. 159).

The author of the research analysed also tourist guides and promotional materials published by the city in terms of the inclusion of information on industrial heritage. He concludes that its presence in analysed publications “may suggest that this heritage is considered attractive and hence included especially in more recent publications (as far as guides are concerned there is a significant increase in the interest in industrial heritage through richer descriptions of such sites)” (p. 185).

The attractiveness of industrial heritage and the monuments of technology was also revealed through research conducted in the Castlefield district of Manchester. The UK's first Urban Heritage Park was founded there in 1982. A research poll conducted in 2008 suggested that 88% of respondents considered the site attractive. Of key significance was the presence of a museum in the area, as well as the presence of the industrial architecture:

— *its attractiveness as a tourist site resides in the presence of the Museum of Technology and Industry (for almost half of the respondents), the fact that the history of the city is linked with this site (35%), industrial architecture (almost 20% of respondents) [...]. What is remarkable is that in case of the local visitors from the city itself and the region, as well as for native (British) tourists the most important was the presence of the Museum and the fact of the link the site had with the city's history, while foreign tourists prioritised industrial architecture and the cultural landscape together with its history (Kronenberg, 2012, p. 31 after Szczurkiewicz, 2008).*

Another study worth mentioning in this context is *Impact of Historic Environment Regeneration* published in 2010 by English Heritage which discusses the influence of the historic environment and heritage-led regeneration on the economy and image of cities. Renovation, repair or modernisation of historic architecture that is in bad condition leads to the improvement of their general appearance, which, thereby, changes their perception and utilisation. This relation is illustrated by Figure 3.10.



🔗 **FIGURE 3.10.** HOW INVESTING IN THE HISTORIC ENVIRONMENT BENEFITS ECONOMIC ACTIVITY AND PERCEPTIONS

SOURCE: AMION Consulting; Locum Consulting, 2010, p. 6

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Historic environment is understood in the report as: “all aspects of the environment resulting from the interaction between people and places through time, including all surviving physical remains of past human activity, whether visible, buried or submerged, and landscaped and planted or managed flora” (AMION Consulting; Locum Consulting, 2010, p. 3). The methodology of the research embraced consultations with individuals involved in the case study projects, surveys and secondary source analysis. In total, sixteen case studies have been reviewed. In addition, for five case study sites, an “on-street” survey, targeted at local residents, workers and visitors (around 1000 people), and a business survey of local firms (over 120 companies) was undertaken. The public opinion survey conducted for twelve months between April 2009 and March 2010 by The Northwest Regional Development Agency on a selection of 35,000 respondents from all over UK showed a positive correlation between the number and nature of heritage assets in given places and their image and appeal as destinations. During the survey respondents were asked to rate destinations in terms of whether they were “my kind of place” for a day out. Each respondent was given a list of twenty towns and cities to rate from an overall list of about 400. The research shows that there is a direct relationship between the number of listed buildings in cities of similar type and their popularity as places to take a day trip (pp. 11-12). Over 90% of respondents of the “on-street” survey undertaken in the case study areas indicated that the investment in the historic environment had resulted in the creation of a nicer place to live, work and socialise, as well as a more attractive visitor destination (p. 58). At the same time, 92% of respondents indicated that they would rate the project as either good or very good in terms of raising pride in the local area, while 93% rated the projects as good or very good in terms of creating a distinct sense of place (p. 59). The survey also included questions about place vitality, which translates into its attractiveness.

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The authors proved that areas benefiting from heritage-led regeneration have strong vitality and are perceived positively by those that use them. In particular, 89% of respondents agreed or strongly agreed that investment has created an environment with an enjoyable atmosphere (p. 61). 93% of interviewees stated that the investment in the historic environment improved the image of the immediate project area and 91% of respondents said that the project had resulted in an improvement in the image of the whole town or city (p. 67).

HERITAGE AS ONE OF THE ELEMENTS CREATING IMAGE

The area of the former Gdańsk Shipyards in Poland, symbolically marked by the history of the Solidarity movement, is at present being converted into a new city quarter. The formerly closed space without direct physical connection to the city is to be transformed into a Young Town — a residential and office quarter with zones for recreation, entertainment and culture. Grabkowska in her study (2006) demonstrates that the perception of the quarter by the inhabitants of the region has changed significantly. In the 2004 survey on the attitudes and expectations about the transformation of the shipyards, conducted among 200 random citizens of the Tricity (urban area consisting of Gdańsk, Gdynia and Sopot), the interviewees were asked to select from the provided list the desirable image of the future quarter. Large part of the respondents indicated answers suggesting the creation of a central zone of green areas, sport and recreation facilities, as well as a culture and arts quarter. The author notices that the low degree of knowledge of these areas among the residents made the investor give some of the abandoned shipyard buildings for temporary use to artists and culture animators, which was supposed to change the image of the quarter:

— *The presence and the creative work of temporary settlers was to activate and create a new, attractive image of the area for future development. In fact, artistic colonisation may be considered the first, unofficial stage of the process of overhaul of the post-shipyard areas (Grabkowska, 2006, p. 93).*

Immovable heritage, as exemplified by the shipyards with its historic architecture, together with cultural activities (visual and performing arts), had an influence on the creation of a positive atmosphere.

According to the already mentioned research by the National Heritage Board of Poland (Kozioł, et al., 2013, p. 34) on the perception of heritage, 33% of respondents claimed that historic monuments could be seen as attractive, offering a place where local residents can spend time in pleasant surroundings, whereas 24% stated that living in an aesthetically appealing environment was more comfortable and that historic monuments increased the aesthetic value of a given site.

Inclusion in various lists, among them in the prestigious UNESCO World Heritage List, may be a generator of attractiveness and subsequently, an increased tourist influx. Those listings are widely recognised brands that act as a kind of certifi-

cate of excellence and are a powerful marketing tool. The report entitled *World Heritage Status: Is There Opportunity for Economic Gain?*, presenting the potential economic and social advantages of including a site in the World Heritage List, was based on the cross-section research of 878 sites from the List (all inscribed in 2009) and contained a list of twelve key areas in which World Heritage Sites (WHS) have socio-economic impact with some evidence of effectiveness. The first on the list was media/PR value. The research revealed the direct link between the WHS status and the media attention:

- *There is a large body of site-specific evidence suggesting that simply becoming a WHS results in an automatic benefit of increased local, national and international media/PR attention. This appears to benefit sites by raising a place's national and international profile; either through individuals using the WHS designation as a quality indicator, or by influencing organisations like international tour operators who make destination decisions on behalf of their future customers on criteria like WHS status (Rebanks Consulting Ltd, 2009, p. 31).*

The media potential entails a new/improved identity and image. The WHS status can also boost civic pride and quality of life, as well as it translates into the development of culture and creativity, e.g. through the construction of cultural attractions:

- *Some of the most inspiring WHSs are those that have taken their heritage and reinvented how visitors and residents experience it by embracing culture and creativity. Possibly the best and most radical example of this is Völklingen WHS, where an unfashionable industrial heritage site has been reinvented as a “must see” cultural visitor attraction as a direct result of its WHS status. This site embraced an imaginative use of contemporary arts and creativity. Several other WHSs have intelligently used their WHS status to better tell the story of the people of the site, including the vernacular cultural heritage of the sites (p. 32).*

In the case of the above-mentioned city of Pécs, which in 2010 became the European Capital of Culture (ECoC), research was conducted between 2008—2011 in order to assess changing perceptions of the city. The poll included a representative sample of residents of Pécs and Budapest and was run before and after the festival year. The results of the research can only partly be referred to the immovable cultural heritage, as it concerned both the programme of ECoC and the fabric of city development. In response to the question about the expectations towards the ECoC events in 2008, 49.2% of the respondents answered that “the image of the city will improve in both national and international contexts,” constituting the third most popular statement. The authors of the survey claim that the data related to the prediction of a better image of the city are even more valuable in view of the fact that it was ranked higher in the responses collected in Budapest. The respondents from the capital were also more prone to choosing “the city will become the cultural centre of the region” and “international relations and collaborations will be initiated” (Koltai, 2014, p. 324). The most important of the necessary measures for the successful management of the ECoC events were: renovation of buildings (59.8%) and monuments (55.9%)

(p. 325). Quite unsurprisingly, the research conducted in 2011 revealed significant improvement of the way the city was perceived:

— *The evaluation of Pécs improved thanks to the ECoC events, both locally and nationally. In the national average, respondents reporting a positive change were at 61.7%, while in the local context it was 66.4%. [...] The image of the city was significantly more positive among the active participants in the events as opposed to those who did not attend any parts of the program. Our hypothesis remained partially unconfirmed, since the highest value of the rating scale (5 = “the city’s image improved significantly”) was less frequent among the respondents from Pécs (16.1%) than it was nationally (19.8%) (Koltai, 2014, p. 333).*

Unfortunately, the survey did not contain questions about the role of cultural heritage, especially architecture. Neither was any other research conducted that would indicate the residents’ view of its significance for the entire project. Nevertheless, due to the fact that the revitalisation of the aforementioned Zsolnay Factory buildings, the restoration of the historic buildings in the Old Town as well as investment in the new wing of the art museum were central in the realised programme, one might assume that the numbers in question can also be applied to these initiatives to a large extent. Especially that 94% of the respondents thought that the 2010 ECoC programme was highly beneficial for the city of Pécs (p. 338).

The ECoC evaluation involves all capitals of culture and the results are always positive. However, examining cultural heritage as a separate research category would be of great value. Pécs was referred to merely as an example, especially that in this case the investment in the immovable heritage constituted an important element of the realised programme.

3.8.2

BUILT HERITAGE AND THE REAL ESTATE MARKET

From a real estate economic perspective, the value of a building lies in its being a source of revenue. In theory some built heritage, or at least some historical monuments, may be traded in a real estate market. In such cases their price is determined by demand and supply of the good. What about its value? Value here would be understood as the largest amount of money a consumer would be willing to pay to get a particular good (it might be lower or higher than the actual market price). This value is estimated based on both use and non-use values and in the case of public and merit goods (among which cultural heritage is numbered) could be determined by using non-market valuation techniques. It is worth referring to Ready and Navrud (2002b, pp. 7-8) who point out the extent of the market of heritage goods: while local cultural heritage good brings value only for the local community, national cultural heritage has importance for most citizens of a country and world heritage sites generate value for people from distant countries.

The economic research concerning impact of heritage on the value of historic buildings themselves or their surroundings usually examines the willingness to pay to live in a certain heritage-related location — either by using hedonic pricing methods, that are based on analysing expenditure behaviour when buying a house or apartment (employing statistical regression models that represent a relation between a price of a given property and its characteristics), or contingent valuation methods, that use surveys to verify people's reactions to hypothetical questions concerning their readiness to spend on cultural heritage (see also Section 2.6.2). Table 3.3 presents examples of the mentioned valuation studies.

People tend to derive welfare from living in a historical building or historical surrounding. The question “Why is it so?” is rarely raised in research. Admitting the lack of sufficient evidence, Ashworth and Tunbridge (2001), nevertheless, list arguments to support this statement, among them the fact that a historical neighbourhood could be seen as a link between the past, present and the future. “Familiarity with places is claimed to be valuable in maintaining an individual's psychological stability and too rapid environmental change may upset this stability” (pp.17-18). Collective memory, connected with a place and expressed by its physical attributes, is also mentioned in this context with the emphasis on the supposition that depriving people of such places or changing them rapidly may cause social disorientation similar to the results of clinical amnesia. Another argument supporting this idea assumes that places are not just locations but social assets, therefore historical surroundings can be used as means to express and pass social values. Of course, in many situations willingness to live in a historical neighbourhood might be perceived simply as an aspiration to be prestigious or trendy, depending on what a given area is associated with. Anyhow, this well-being could be assessed and estimated in monetary terms.

TABLE 3.3. SELECTED LITERATURE ON IMPACT OF CULTURAL HERITAGE ON THE REAL ESTATE MARKET (VALUE AND PRICES OF PROPERTIES)

STUDY	METHOD USED	OBJECT OF THE STUDY
AHLFELDT & MAENNING, 2010	hedonic pricing	impact of cultural heritage on housing prices in Berlin, DE
AHLFELDT, ET AL., 2012	hedonic pricing, interviews and questionnaires	costs and benefits of a location near cultural heritage in England, UK
LAZRAK, ET AL., 2011	hedonic pricing	economic effect of listed heritage in Zaanstad, NL
MOURATO, ET AL., 2002	contingent valuation	Valuation of Christian Orthodox monasteries, BG
MORO, ET AL., MAY 2011	hedonic pricing	impact of cultural heritage on housing prices in Dublin, IR
POWE & WILLIS, 1996	contingent valuation	valuation of Warkwoth Castle, UK

⊙ RUIJGROK, 2006	hedonic pricing, contingent valuation	valuation of culture heritage of Tiel, NL
SACHE, 2009	contingent valuation	valuation of Mogoșoaia Palace, RO
SANZ, ET AL., SEPTEMBER 2003	contingent valuation	valuation of the National Museum of Sculpture in Valladolid, ES

SOURCE: OWN.

The research on the impact of heritage on the real estate market concerns two kinds of effects: heritage effect (related to the inherent features of a given object) and policy effect (stemming from protection policies in a given area) with a challenge of separating one from each other. It mostly deals with assessing the value of built heritage in conservation or listed areas and the effect such heritage has on its surrounding (both within and outside the area).

In general, identified research topics evolve around the following issues:

- inscribing cultural heritage on lists of protected monuments/conservation areas;
- ⊙ question of profitability of listed monuments;
- ⊙ impact on property prices in the neighbourhood;
- value attached to cultural heritage based on property prices in its vicinity;
- estimating economic value of cultural monuments as such.

CULTURAL HERITAGE LISTING

Many of the identified studies were inspired by listing an area or a building as one officially protected by law and including it in the list of historic monuments, conservation areas or other special list, such as the UNESCO World Heritage List. This new status of a listed heritage may, of course, have impact on utility of a given property and change its price. Being listed may be treated as an appreciation of a place and area, which can be read symbolically by local residents (as a reason for boosting pride of the place of residence), tourists (as a certificate of quality), and investors (as a provider of stability of investments). The negative effects, especially for an owner of a given property, of this new status of a place include legal constraints regarding the maintenance, renovation and functions, which may in a way limit the owner's free disposal and use of the building. On the other hand, however, an owner of a listed property is in many countries entitled to receive subsidies for the maintenance or is eligible for tax reductions. Surprisingly, collected studies rarely analyse the problem of gentrification and driving out residents that can no longer afford to live in a conservation area since increase in the property value as a result of the listing can translate into, among other things, higher rents.

In contrast to Europe, in the US the research on the links between the heritage and real estate market has raised relatively high interest (for example Listokin,

et al., 1998 or Leichenko, et al., 2001). A series of research projects on the impact of immovable heritage (historic architecture) and the fact it has been listed as a historic landmark (on the central as well as local level) on the real estate market was conducted. In particular, studies aimed at verifying a hypothesis that listing as a historic landmark or considering a particular area historic, monumental or worthy of conservation are reflected in a negative manner on property prices. This was supposed to stem from the limitations of the use of the property by the owner due to its new status. Although empirical studies yield mixed results, in general the existing body of literature presents positive effects and externalities, including cultural heritage being a catalyst for revitalisation of a neighbourhood or contributing to the *genius loci* of place, what in turn attracts more tourists and new potential inhabitants.

In Europe, analysis of the relation between historic landmarks and property prices is conducted in small numbers. However, findings of existing studies, although still too few and dispersed to draw strong general conclusions, seem to confirm the overseas results.

HISTORICAL SURROUNDING, MONUMENTS AND PROPERTY PRICES

One of the research projects dealing with property prices is the one conducted by Ahlfeldt and Maenning (2010) in Berlin. It employs hedonic pricing valuation method and is based on sale and purchase transactions of condominium apartments (8682 transactions). Using these data, the authors reach a conclusion that location in the vicinity of built heritage influences the price of a condominium. The strength of the impact depends on the distance between the apartment and the landmark. The increase in the property prices, depending on the decrease of the distance to a landmark, might be used also as an approximation of the value buyers attach to heritage and monuments. Surprisingly, no significant price differentials were found for condominiums located in listed buildings, which leads the authors to the conclusion that the positive (effect of cachet, appeal of architecture, prestige of some historic relevance) and negative (constraints and obligations for an owner of a listed property) effects must cancel each other out.

Ahlfeldt and Maenning claim that residents prefer to have a variety of historic objects in their neighbourhood, which is confirmed by the fact that heritage potentiality is one of the most important price determining factors. Moreover, the effects of the nearest landmark are almost entirely explained by potentiality. Hence, one may conclude that for residents it is not only the relation between transport costs to the nearest landmark and the price of the apartments that is important, but also the presence of heritage sites in the area where they plan to buy an apartment in general (p. 310). The authors conclude:

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It is worth conserving the fabric of built heritage as a whole. While the aesthetic appeal of particular buildings of historical importance may be indisputable, our results suggest that the totality of the built environment — not just the proximity to a single monument — constitutes the amenity recognized by real estate markets. According to our estimates, an additional landmark in close proximity can have a marginal price effect of up to 2.8% (Ahlfeldt & Maenning, 2010, p. 314).

Moreover, Ahlfeldt and Maenning show that the external heritage effect embedded in property values in Berlin amounts to as much as 1.4 billion EUR.

Property prices for protected buildings as well as for the ones located in the vicinity are higher for areas characterised by a high density of heritage objects. This correlation was indicated by Benhamou's (2003) research on Paris. She also mentions the rise of property prices as a result of restoration works, as exemplified by Le Marais, where the Picasso Museum was open in Hôtel Salé in 1985. It led to the increase of prices and the change of the character of the quarter: the position of Le Marais on the real estate market in Paris grew from 11th in 1979 to 5th in 1999.

The outcomes of the research conducted in the Netherlands by Ruijgrok (2006) and in Ireland by More et al. (May 2011) also present a positive influence of heritage on property prices. In both researches authors use hedonic pricing method to assess the value ascribed to heritage. In order to determine which heritage-related characteristics might influence property prices, Ruijgrok identified seventeen historical and non-historical factors (e.g. authenticity, monumental status, year of construction) to use them in a regression model. Her case study was an old Hanseatic city of Tiel where almost 600 houses were analysed (293 with historical characteristics and 298 without historical characteristics) using the above-mentioned seventeen characteristics-variables in a regression model. It was accompanied by 380 personal interviews that were meant to assess willingness to pay for recreation and bequest. The research showed that in the case of Tiel only two variables — “authenticity” and “ensemble” — can be used to measure the potential of cultural heritage impact on property. These two accounted for 14.85% of the average house price.

Moro et al., on the other hand, employed Geographic Information Systems (GIS) software, which enabled them to analyse 6,956 transactions covering the period 2001–2006 in Dublin, and compared them with a map of over 140 historic objects (historic architecture, archaeological sites, churches, Martello towers, memorials). As a result, a correlation between property prices and the distance from a historic landmark was found to be reflected in the average (different heritage categories gave different results) price increase of 0.6–0.7% for every 100 metres closer to a heritage building.

A thorough investigation, that is also worth a mention here, was commissioned by English Heritage from Ahlfeldt, Holamn and Wendland (2012) who conducted quantitative research (analysis of over a million transactions on the real estate market in the period 1995–2010) and qualitative research (a series of interviews and surveys among property owners in ten selected case study areas) on the

costs and benefits of the location of a property within or in the vicinity of a conservation area. The research outcomes confirm the increase of property prices in conservation areas (unconditional estimates show an increase of about 23%). Price premium increases parallel to the size of the area and the time span from the date of registration. It has been indicated that property prices in conservation areas increase at 0.2% faster and those in the vicinity of these areas at 0.1% faster than prices of properties in other locations. What is more, the impact of the conservation area on property prices can be noted up to 50 metres from the boundary of the area, where the premium is still on the level of 5%. Right on the boundary it can reach around 10% and it doubles in the case of the innermost zone of the conservation area, more than 450 metres from its boundary. In places where the density of heritage objects is the largest, at the very centre of the area, heritage externalities may reach up to 100% of the amount at the boundary of the conservation area.

In the conclusion of their research Ahlfeldt, Holamn and Wendland emphasise that the costs potentially incurred by the owners of these objects, related to the limits of their use and the cost of maintenance, are much lower than the positive factors stemming from the location in the registered conservation area. Supposedly, this is due to the internal and external character of the buildings in the area, a sense of control or certainty about the future appearance of a given area, as well as social capital, the identity of the place, or the engagement of local community. Moreover, a research conducted by Ahlfeldt et al. suggests that a pure policy effect (which is the registration of a place as a conservation area) has a relatively small effect itself. What actually boosts property prices is a heritage effect, which means that the increase is a result of the appreciation of a particular character of the place related to the inherent features of heritage objects located there or its *genius loci* (pp. 68-70).

In a study from the Netherlands, Lazrak et al. (2011) focus on the city of Zaanstad, formed in the 1970s through a merger of smaller historical towns: Koog aan de Zaan, Wormerveer, Westzaan, Zaandijk, Zaandam, Krommenie and Assendelft. The authors try to assess the effect of the presence of historic objects on the value of real estate by means of the hedonic regression method, taking into consideration the direct and indirect effect of a monument's status. The novelty in their approach consisted in the use of time-sensitive decaying modelling approach to calculate the spatial weight matrix. The study uses transaction data that cover the majority of houses sold in the Zaanstad municipality in years 1985–2007 and combines them with information from the Land Registry concerning the stock of national monuments in this area and GIS data about neighbourhood characteristics. Besides the conclusion that monuments gain the premium of 22.8% in relation to properties without this status, the authors claim also that there is a positive correlation between the value people ascribe to buildings and the passage of time. Additionally, taking into consideration i.e. the fact that buildings located in conservation areas gain the premium of 26.4%, a powerful historic ensemble effect or a heritage effect emerges there (properties have a higher value when they are located in an area of historic atmosphere).

PROFITABILITY OF HERITAGE BUILDINGS

Arguments on the profitability of heritage buildings could be considered on the basis of comparative research on the value differentia between protected and non-protected properties. One of the difficulties would consist in finding an adequate and comparable sample since such studies are quite rare. One such study was conducted by the Royal Institution of Chartered Surveyors and English Heritage (Royal Institution of Chartered Surveyors, English Heritage, 1993, 1995, 1996, 1997, 1999), which compares the profitability of buildings used as office spaces by dividing them into five categories (protected and non-protected built before 1945 and between 1945 and 1974, as well as protected buildings built after 1974). It has to be remembered that the buildings analysed are not identical and in some cases their location can also be accountable for the good investment performance. Results of the research show that protected buildings are as highly valued by the real estate market as the non-protected ones (though one might suspect that maintenance of historical buildings is more costly and due to the protection restrictions less adaptable and therefore less attractive for potential users). The rate of income return and capital growth analysed for the period 1980-1995 for the above-mentioned categories of listed buildings is as high as or even higher than for their unlisted equivalents. It is especially true for buildings erected before 1945, where the annual return for protected properties outgrows annual return of all buildings by 0.8 percentage point (Creigh-Tyte, 2000, p. 225). One of the reasons that could be relevant here is the value of prestige derived by some companies from the fact that their offices are located in historical or even listed buildings (see Section 3.8.7).

Rypkema (2009, p. 116) is also worth quoting here, as he draws attention to another issue connected with heritage buildings, namely, that for some buildings it could be the prestige that attracts tenants. But in many more cases it is the relative affordability of older properties that appeals to them. This is especially true for small businesses, start-ups, and the creative sector, who could not afford to rent space in a new office tower. Similar arguments were already raised in the 1960s by Jane Jacobs (1992) who advocated for diversity of a city and the importance of old buildings. She stated: "The district must mingle buildings that vary in age and condition, including a good proportion of old ones" (p. 186).

ESTIMATING THE VALUE OF BUILT HERITAGE

Cultural heritage could be seen as priceless. Whilst this might well be true, in the case of scarce resources and the competition for (mostly) public money with other publicly supported sectors (such as health, education, security), there is a growing need to estimate the value people associate with heritage, if not for anything else then for policy purposes. This type of estimation is achieved by using contingent valuation methods. As Pearce et al. (2002) complain:

In spite of the obvious links between questions of the conservation of natural and cultural goods, there have been surprisingly few applications of non-market valuation techniques to cultural assets. Only a small number of studies, using almost exclusively stated preference techniques, have been applied to cultural heritage goods (p. 257).

In addition, there are some examples presented below to support the thesis that people, in fact, value their cultural heritage — including built heritage — quite highly and would be willing to pay extra to gain their use and non-use values.

In the UK contingent valuation studies became popular in the 1990s. One of the first publications in this vain was by Willis (1994) who assessed the willingness to pay in the case of Durham Cathedral, suggesting that visitors were willing to pay twice the average of the voluntary donation (i.e. 0.80 GBP, data collected in 1992), which produced a value of 388,000 GBP annually. The value of Warkworth Castle (Powe & Willis, 1996), Gaigner City (Garrod, et al., 1996), Lincoln Cathedral (Pollicino & Madison, 1998) were examined using the same method as well. In the case of the Northumbrian Warkworth Castle it was assessed that benefits related to recreation, entertainment and educational values were twice as high as the price of the ticket to the castle. For visitors, educational and recreation values are higher than non-use and preservation value.

The research on the value of heritage with the use of the contingent valuation method was also conducted by Sache (2009), who tried to assess the value of the Mogoşoaia palace in Romania. The Romanian Renaissance-style palace from the turn of the 16th and 17th century, located near Bucharest, is one of the most significant attractions of the region. On the basis of the conducted survey, the author stated that 74% of interviewees were ready to pay around 20 RON (c. 4.53 EUR) for the ticket, if it served to ensure the preservation of the monument. Curiously enough, the reason for not being willing to pay more than that was not the lack of sensitivity to the condition and significance of heritage, but the lack of trust in the authorities responsible for the conservation of historic monuments. With a timespan of fifty years, the average number of visitors per year was estimated as 27,450 with 74% of them willing to pay 20 RON of entry fee. Hence, the value of the palace was estimated at 8,5 million EUR.

Another example of research, conducted by Mourato et al. (2002), focuses on the problem of restoration, and in many cases the saving from complete ruin of Christian Orthodox monasteries in Bulgaria. A contingent valuation survey was conducted in the beginning of 1997 on a random and representative sample of 483 people interviewed in seventeen locations in the country. Interviews were accompanied by text and visual information on the state of conservation of the sites and the potential effects of restoration. Most people were familiar with the monasteries (96% visited a monastery at least once in their lives, although only 12% for religious reasons). The rest claimed either recreation and relaxation (20%) or interest in the history of Bulgaria and its heritage (68%) as the main reason for their visit (p. 75). Despite the country's difficult economic situation Bulgarians attribute a significantly positive value (about 0.1% per capita of gross national product) to the conservation and restoration of their Christian Orthodox monasteries (p. 83).

3.8.3

EDUCATION, SKILLS AND KNOWLEDGE

The impact of cultural heritage on education can be analysed both from the perspective of culture, as well as with regard to the development of learning. Education is understood broadly as learning, gaining knowledge and skills, which, on the other hand, translates into boosting social competence. Getting to know cultural heritage not only builds up knowledge and skills in the field of heritage itself, but also broadens horizons and contributes to the development of skills from literacy to creativity. There is a number of studies presenting impact in this domain, especially related to young people. However, a great majority of studies reveal the lack of hard data and the difficulty in producing them. Areas of impact which are represented in the research are most often museums and libraries, as well as projects supported by the Heritage Lottery Fund (HLF) in the UK.

KNOWLEDGE, SKILLS AND AWARENESS DEVELOPMENT

The educational value of heritage in the UK was thoroughly analysed in reports on projects financed by the Heritage Lottery Fund. Yet, it needs to be emphasised that this analysis does not distinguish between various types of heritage. The comprehensive analysis of projects realised from 1994 to 2007 indicates that out of 16,162 projects included in the report, 4,530 projects related to restoring buildings, including 2,896 churches, chapels and cathedrals, 2,022 museums and galleries and 320 world heritage sites (Clark & Maeer, 2008, p. 34). The key advantages mentioned in the report related to the social impact of the projects undertaken in 2006-2007 included learning. Project managers were asked to identify the benefits to individuals from active participation in HLF funded projects and the outcomes of these projects for wider communities. The methodology of the research included desk research, data analysis, qualitative in-depth interviews and project observation visits. The results showed that the projects in question had a powerful impact on the increase in knowledge, the awareness of heritage, personal satisfaction, as well as improved skills in learning about heritage.

📌 **TABLE 3.4.** BENEFITS TO INDIVIDUALS FROM PARTICIPATION IN HLF FUNDED PROJECTS

PROJECT IMPACT (ACCORDING TO PROJECT MANAGERS IN %)	2007	2006	2005
INCREASED KNOWLEDGE	99	89	
INCREASED AWARENESS OF HERITAGE	97		
INCREASED ENJOYMENT	97	89	78
INCREASED OPPORTUNITIES FOR LEARNING ABOUT HERITAGE	93	88	66

SOURCE: Applejuice Consultants, 2008, p. 38.

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Participants of projects improved various skills, depending on the type of the projects, such as research skills as well as their self-confidence and social and communication skills (thanks to, for example, group work, presentation, listening, interviewing, observation), ICT and technical skills (Applejuice Consultants, 2008, p. 50). Significantly, the authors of the project state that in the case of numerous projects “participants indicated that they were keen to develop their skills, undertake further training or education or pursue employment opportunities as a direct result of taking part in an HLF funded project” (p. 52).

In 2009 Museums Galleries Scotland commissioned the Simon Jaquet Consultancy Services Ltd to conduct research in Scottish museums aiming to explore the role of museums in creating community cohesion and identity. Research on five case studies led to the formulation of four functional goals of museums. They included the multiplicity of legitimate roles played by the museum and also indicated the role of the museum as an intersection of past and present; this goal was further defined in the following way: “identifying the elusive point of change when the present becomes the past is central to any museum that seeks a relevance to a contemporary audience” (Simon Jaquet Consultancy, 2009, p. 38). Every case study addressed the role of museums in the development of physical, human, social, economic and cultural capital, supported with the statements of museum staff, museum collaborators, and visitors. In the case of museums in the region of Coatbridge, defined as the “iron heart of Scotland,” the staff emphasised how important it was to reach out into the community. The report states: “This needed to be rooted in an understanding of people rather than buildings” and this claim is supported with the opinion of the one of the project managers:

— *It's quite simple. If you positively engage with the museum, it can give you a sense of pride in your community. Our job is to ensure realistic access. It's not about ramps. It's about reaching out and bringing people in. Where that's not possible, we continue the service outside the museum (Simon Jaquet Consultancy, 2009, p. 26).*

The report entitled *Impact Evaluation of Museums, Archives and Libraries: Available Evidence Project*, which was published in 2002, is also based on the data collected in the UK. It is a summary of research on the economic and social impact of museums, archives and libraries on the basis of the review of the literature published during a five year retrospective period, with a particular emphasis on impact evaluations conducted within the UK. The part of the report concerning social issues identifies personal development as the most important area of impact because, as discussed before, the immediate outcomes are more easily identified and less problematic in terms of establishing causality. The benefits of participating in activities offered by cultural institutions are the following:

- enjoyment and personal satisfaction;
- acquisition of skills;
- trying new experiences;

- increased confidence and self-esteem;
- changed or challenged attitudes;
- developing creativity, cultural awareness, communication and memory;
- providing support for educational courses, job seeking and workplace skills (Wavell, et al., 2009, p. 79).

In the field of education the report diagnoses the positive impact of museums, archives and libraries on knowledge development. As evidence, the following categories are listed in literature:

- engagement and enjoyment;
- acquisition of new skills;
- trying new experiences;
- encouraging creativity;
- increased self-confidence or changes in attitude;
- higher order cognitive learning, increased knowledge and understanding;
- academic achievement, particularly in reading and language development (p. 80).

Significantly, however, the research review emphasised also that “much of the evidence is in fact pointing to potential areas of impact rather than actual impact” (p. 9). In many places within this extensive report one may find an opinion about lack of tangible data illustrating this impact:

— *While most of the literature reviewed here conveys the opinion that the sector does have a positive social impact, particularly in relation to aspects of personal development, extensive hard evidence of this impact, gathered systematically, is often lacking, particularly in the museums and archives (p. 79).*

A cogent example, mentioned by Wavell et al., is the report *Learning through Culture. The DfES Museums and Galleries Education Programme: A Guide to Good Practice* (2002). The aim of its authors was to “raise awareness of the high potential that exists in museums and galleries for genuine and long-lasting learning and to show some of the ways in which this learning can be achieved” (Clarke, et al., 2002, p. 4). In reference to this report, Wavell et al. recognises the difficulty of identifying unambiguous impact indicators:

— *Although there is undoubtedly some sound evidence of impact on individuals within these cameo reports, there is no way of identifying the quality of the data collection methods, the quality of the indicators used, or the extent of the impact in terms of percentages of participants, for instance. It is argued therefore, that this evidence has limited value in assessing the extent of impact; however, like the individual project evaluations described in more detail, it does add weight to the evidence that this type of intervention does have a positive impact on some participants (2009, p. 34).*

A good example of the research measuring the goals that were achieved was the Learning Impact Research Project, initiated in the UK in 2001. The aim of the project was to develop a method that would allow museums, archives and libraries to present their social value and educational impact on the audience. One of its parts included the development of Generic Learning Outcomes (GLO), which were used to measure educational impact of three types of institutions. Table 3.5 illustrates distinguished results of education.

📌 **TABLE 3.5. GENERIC LEARNING OUTCOMES**

KNOWLEDGE AND UNDERSTANDING	knowing what or about something	deepening understanding
	learning facts or information	how museums, libraries and archives operate
	making sense of something	making links and relationships between things
SKILLS	knowing how to do something	social skills
	being able to do new things	communication skills
	intellectual skills	physical skills
	information management skills	
ATTITUDES AND VALUES	feelings	empathy
	perceptions	increased motivation
	opinions about ourselves (e.g. self-esteem)	attitudes towards an organisation (e.g. a museum, archive or library)
	opinions or attitudes towards other people	positive and negative attitudes in relation to an experience
	increased capacity for tolerance	
ENJOYMENT, INSPIRATION, CREATIVITY	having fun	creativity
	being surprised	exploration, experimentation and making
	innovative thoughts	being inspired
ACTIVITY, BEHAVIOUR, PROGRESSION	what people do	reported or observed actions
	what people intend to do	a change in the way that people manage their lives
	what people have done	

SOURCE: Bollo, 2013, p. 51.

GLO do not collect objective information on what the audience (participants) have learnt, but aim to gather data on what visitors say they learnt through a museum experience.

In 2004 GLO, together with instructions, examples and questionnaires, were published on a special online platform called “Inspiring Learning for All,” making the outcomes accessible to all institutions interested in the research. The analyses, both quantitative and qualitative, may be adapted by every institution for their own purposes by selecting questions from the provided set or formulating them on their own.

The document that summarised the project, which focused on the formulation of the framework for the assessment of impact, states that most visits to museums, archives and libraries are informal in nature, so they are not organised

as a group activity. They can include individuals, families and groups of friends who visit such institutions for various reasons: they learn as a hobby or as entertainment. Their motivation to come does not need to be the will to learn something, even though spending one's free time in a museum entails acquiring knowledge. People learn in many different ways, e.g. by reading, interaction with other people, touching, and doing something, while institutions, including museums, are often unaware of the goals behind the audience's act of acquiring knowledge. The results of visiting such institutions may include:

- *increased knowledge and understanding, development of new skills and abilities or inspiration to learn more. Often, learners use museums, archives and libraries to reinforce knowledge that they already have. Learning can also be short-term and long-term. A learner might not use their new knowledge or ability until a long time after the actual learning event. [...] Many of the learning outcomes from such environments are the so-called "soft" outcomes. These include attitudes, values, emotions and beliefs.*
- *[...] Also it would be inappropriate for museums, archives and libraries to set specific learning outcomes for learners to achieve. They do not know the prior knowledge of their users and so would be unable to make judgements about how much users had learnt. Users themselves, however, are capable of making such judgements about their own learning (Research Centre for Museums and Galleries, 2003, p. 6).*

Yet another list, called Generic Social Outcomes (2005), was developed in the UK, which helps museums, libraries and archives to describe and measure the wider impact of their work on communities. It embraces the impact of cultural institutions as presented in Table 3.6.

📌 **TABLE 3.6. GENERIC SOCIAL OUTCOMES — IMPACT OF MUSEUMS ON THE COMMUNITIES**

1. Stronger & Safer Communities	2. Strengthening Public Life	3. Health & Well-Being
1.1. Improving group and inter-group dialogue and understanding	2.1. Encouraging and supporting awareness and participation in local decision making and wider civic and political engagement	3.1. Encouraging healthy lifestyles and contributing to mental and physical well-being
1.2. Supporting cultural diversity and identity	2.2. Building the capacity of community and voluntary groups	3.2. Supporting care and recovery
1.3. Encouraging familial ties and relationships	2.3. Providing safe, inclusive and trusted public spaces	3.3. Supporting older people to live independent lives
1.4. Tackling the fear of crime and anti-social behaviour	2.4. Enabling community empowerment through the awareness of rights, benefits and external services	3.4. Helping children and young people to enjoy life and make a positive contribution
1.5. Contributing to crime prevention and reduction	2.5. Improving the responsiveness of services to the needs of the local community, including other stakeholders	

SOURCE: Bollo, 2013, p. 47.

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ADVANCEMENT OF HUMANITIES AND SCIENCES

As a subject of academic and specialised research, cultural heritage has an impact on the development of science and humanities and, indirectly, on education. As Murzyn-Kupisz (2012, p. 124) emphasised, “heritage constitutes an important resource for academic research, not only in the field of arts.” It is also one of the most natural relations to science and humanities, rarely, however, discussed in the literature on the topic. Even in the quoted study the author does not go beyond this statement. Indeed, every example of research in the field of culture, cultural heritage, art history, museology, etc. can be seen as contributing to the advancement of humanities and sciences, thus every scholarly publication in the field of cultural heritage would have had an impact with the potential to have been discussed in the CHcFE report.

EDUCATION NOT AS A PRIME GOAL

The educational role of heritage, as available to various groups and related to the development of knowledge and competence, is often addressed in research papers. This education is formal and informal in nature, and often features, as if by chance, being addressed to all age and social groups. As Murzyn-Kupisz states:

— *objects, places and associations with the past do not work as objects of knowledge as such, but they also work as a tool to explain contemporaneity and its historical conditions, as a medium of initiating inter-generational dialogue, building the ability of group work, inspiring curiosity, imagination and creativity, stimulating interest in various socio-economic phenomena, forming tolerant attitudes, positive and open to learn about different cultures and habits (2012, pp. 124-125).*

However, education and knowledge do not always work as main incentives to visit an institution or a heritage site. Murzyn-Kupisz presents this issue with the example of the Castle Museum in Pszczyna, where the most common motive of a visit was the desire to spend time in pleasant surroundings (72%), the second was to show the museum to children, family, friends or acquaintances, while only the third most common answer was related to gaining knowledge and new information (41%) (p. 125). Nevertheless, the cognitive element usually features when there is the question of getting to know the unknown:

— *Although very often [...] it is more important to rest or to enjoy oneself with family or friends, many people who visit heritage institutions leave them with a sense of having gained new knowledge, new inspirations or having been made curious (Murzyn-Kupisz, 2012, p. 125).*

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CROSS-CURRICULAR SKILLS

The impact of education on children and adolescents in the context of heritage has been particularly researched in the UK. In 2005 the Heritage Lottery Fund published a report entitled *The Impact of HLF Funding for Curriculum-Linked Learning for 5-19 Year Olds*, which aimed to detect a correlation between projects financed by the fund and learning within the indicated age group. The study was conducted for twelve months and involved fifty projects financed by the HLF. The results showed that the correlation was relatively low and they were determined by a wide array of various factors. Special focus was put on the change of attitudes, behaviour and self-confidence, as well as the improvement in students' skills. The key conclusions were:

— *Pupils enjoyed the experience of visiting heritage sites and teachers reported improvements in their attitudes, behaviour and self-confidence. [...] Teachers also reported improvements in pupils' cross curricular skills including literacy, numeracy, observation, thinking skills, group work and motor skills. [...]*

It was difficult, however, to link participation in heritage education activities to improvements in pupils' curriculum-linked knowledge, although this was more apparent for history (English Heritage, 2007, pp. 44-45).

CONTINUING THE EDUCATION

Heritage may attract people who for various reasons interrupted education and wish to continue gaining knowledge and skills. The report *Local and Regional Development through Heritage Learning* (2007) discusses the role of the Jamtli museum, which is a regional museum of Jämtland and Härjedalen in Östersund, Sweden. It consists of an open air museum with historical buildings and an indoor museum. One of the museum target groups are people who finished school education at an early stage. In collaboration with the regional archive and the local secondary school they initiated a programme creating positive learning experiences for young people. The aim of the work has been to stimulate the participants to re-engage with the formal system of education or otherwise to achieve basic competences. The results have been very positive. Of the participants, one third has re-engaged in school, or has begun complementary studies at the Folk High School or in other semi-formal institutions (Zipsane, 2007, p. 12).

SHARING AND BUILDING COMPETENCES

Museums also play a vital role in the development of social capital of elderly people who are encouraged to become involved in museum programmes. The aforementioned report lists two reasons why they visit the museum several

times a month, or even a week, namely that they feel needed and are given an opportunity to socialise:

— First, it is important that they experience that they have competences which are in demand. They have left working life, and instead of experiencing that an employer pays them a salary for their work, they can now experience an organization that shows gratitude and appreciation for their efforts, based on their personal competences. Secondly, the elderly participants express the feeling that they can come to the archive or the museum and be quite certain that here they will meet other elderly people of their own generation, who share the same interest and more or less the same life experiences (Zipsane, 2007, p. 14).

The role heritage plays in education and in building social competence was indicated in the aforementioned report from the research conducted in Poland, entitled *Społeczno-gospodarcze oddziaływanie dziedzictwa kulturowego. Raport z badań społecznych* [Socio-economic impact of cultural heritage. Report on social research]. The authors claim that heritage contributes to the achievement of all the particular goals indicated in the *Strategy for Social Development* approved by the Ministry of Culture and National Heritage in Poland in 2011, namely:

- shaping attitudes that favour cooperation, creativity and communication, e.g. by voluntary work, educational activities, the possibility to draw inspiration from heritage;
- the improvement of the mechanisms of social participation and the influence of citizens on public life through work for local community, civic awareness, the knowledge of tradition and history, the awareness of identity and local belonging;
- the improvement of processes of social communication and the exchange of knowledge, e.g. through the possibility to engage in voluntary work or apprenticeship in heritage institutions, or educational work related to heritage;
- the development and effective use of cultural and creative potential through, for example, the use of resources developed by previous generations (Kozioł, et al., 2013, p. 32).

89% of respondents declared that heritage played an important social role. Moreover, research revealed that the majority of respondents (62%) indicated that heritage built national identity especially through its vital role in presenting history. On the basis of conducted research the authors suggest that “the access to heritage is an element of constructing identity, that is interpersonal relations and trust that ease interaction and cooperation” (Kozioł, et al., 2013, p. 32).

EDUCATION AND CONSERVATION ACTIVITIES

Finally, it should be underscored that heritage can also have an entirely different impact in relation to the subdomain of education. Herewith, the link can be made with actual conservation activities that are crucial to the preservation of

heritage and the urban environment. In order to guarantee the quality of the historic urban environment, it is necessary that contractors and conservators master traditional skills and crafts. However, in Europe a growing decrease of the number of experienced contractors as well as trades- and craftspeople that have adequate knowledge, skills and competence is observed (Hutchings & Corr, 2012). This is usually attributed to the rise of modern historical consciousness at the end of the 18th century, whereby the evolution of science made society move away from tacit knowledge. Moreover, the 1960s professionalisation of the conservation sector and paradigm shift from craft to science led to standardisation in the Western world (Hassard, 2009). This decline was already widely accepted in the 1980s and underscored by the Council of Europe in the Granada Convention (1985, p. 16) which states that “each Party undertakes to promote training in the various occupations and craft trades involved in the conservation of the architectural heritage.” In the UK some qualitative studies have been conducted on this growing gap in the crafts sector (by National Heritage Training Group, 2005–2013).

There are, nonetheless, several innovative examples in Europe where immovable heritage has been successfully used to increase both the conservation skills and efficiency of local maintenance markets. These innovative practices start from the importance of interaction between groups belonging to different sectors. In academic research, this phenomenon is referred to as the “trading zone”: although several sectors have different objectives and viewpoints, they use forms of exchange by building an intermediate language, which allows them to communicate and create new cooperation (Galison, 1997). An interesting example in this sense is the Halland Model that was implemented in Sweden (Gustafsson & Rosvall, 2008). Within the framework of the social economy sector, unemployed construction workers and apprentices were trained in traditional building techniques. During this training they gained proficiency on historic buildings at risk under the supervision of skilled craftsmen and conservation officers. In line with the concept of the “trading zone,” this approach held benefits for different sectors. In the process, historic buildings at risk were saved from demolition, a younger generation was trained in craftsmanship and new jobs were created. Similar regional cross-sectorial cooperation has large potential in sustaining the crafts and quality required for efficient built heritage management.

3.8.4 ENVIRONMENTAL SUSTAINABILITY

Among submitted studies labelled as focusing on the environmental impact domain only a selected few deal with climate change or environmental standards research. Most of them are related to the concept of the historic urban environment and analyse the different impacts that immovable heritage can have in this context. They range from the topic of environmental enhancement and an increase in the (environmental/economic/social) wellbeing of a region

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(Storhammar & Tohmo, 2010, p. 48) to the issue of creating a positive image for an area (e.g. Heritage Lottery Fund, 2013; Alberti & Giusti, 2012; Švob-Đokić, 2007; Brunner, et al., 2009). Other studies combine this innovative inclusive definition of what immovable heritage entails with a more traditional approach of immovable heritage as a source for socio-economic development through urban regeneration. For example, a study by Pendlebury (2002) describes an impact of combining a strategy based on an immovable heritage conservation with an urban regeneration project in Grainger Town, an area in Newcastle upon Tyne in the UK. The study by Labadi (2011) evaluates four case studies in the historic urban environments of Liverpool, Lille, Manchester and Krakow, where an integrated heritage approach has contributed to the regeneration process of whole area.

The studies that deal with the impact of immovable heritage on environmental sustainability are mostly focused on two major research paths: building stock research and life-cycle cost analysis (LCCA).

BUILDING STOCK RESEARCH

In 1999 Kohler et al. (1999) correctly stated that renovation and refurbishment of the existing building stock would become a dominant aspect of the construction industry. Indeed, as outlined in the macro level, due to a changing context of urbanisation and a market-oriented attitude, it becomes customary to speak less of the “construction industry,” but rather of an “industry of the built environment.” The main arguments for this transition is the fact that maintaining existing structures contributes to reducing urban sprawl, prolonging the physical service life of buildings and building parts, supports waste-avoidance and preserves embodied energy.

Especially in Europe, which has a long building history, research on the existing building stock has gained importance in the last decade. Considering that energy use in the residential sector accounts for 23% of the total energy use on the European level (International Energy Agency (IEA), 2004), there is an increasing recognition for new policies to limit energy consumption and increase energy efficiency. Although in the last few decades growing policy attention for the existing residential stock has been observed (Kohler & Hassler, 2002; Thomsen & van der Flier, 2002; EuroACE, 2004; Kohler, 2006; Sunikka, 2006; Thomsen & Meijer, 2007; European Insulation Manufacturers Association (EURIMA), 2007), building regulations and other instruments were for a considerable period mainly focused on newly built dwellings. Nevertheless, existing dwellings exceed the number of newly built ones in most developed countries. The existing stock will continue to dominate for the next fifty or more years.

Therefore, one of the main issues pointed out in building stock research is the link between the dwelling stock age and its physical characteristics, including thermal performance. As noted by Meijer et al. (2009):

It seems that the European pre-war residential stock is reasonably homogenous in terms of national construction characteristics. Dwellings built after the Second World War and before the oil crisis in the 1970s account on average for almost one-third of the total stock and are, generally speaking, less homogenous than pre-war buildings. A common characteristic is that the buildings were generally poorly insulated at the time of construction and show a relatively high need for renovation. In most countries, dwellings built between 1970 and 1990 account for approximately one-quarter of the total stock. Exceptions are France and the Netherlands with shares of more than 35% for this building period, and Finland with more than 43%. In general, the dwellings built after the oil crisis and the introduction of mandatory thermal regulations are reasonably well insulated, but already need some basic renovation (pp. 540-541).

Although there is today an increasing awareness of the CO₂ reduction potential of the existing stock among stakeholders (EuroACE, 2004; European Insulation Manufacturers Association (EURIMA), 2007; International Energy Agency (IEA), 2004), reliable information about the composition of the existing building stock, renovation activities, the dynamics of its transformation and its relation to the different actors in property professions is very limited. There are only a few studies that take up this problem with a scientifically grounded methodology. Some good examples in this context include studies by Deilmann et al. (2009), who analyse the housing stock shrinkage in Germany; Gilbert (2009), who examines the social stakes of urban renewal in context of the French housing policy; or Thomsen and van der Flier (2009), who analyse the decision making process about dwelling replacement or life-cycle extension in the Netherlands and six neighbouring countries. Another key piece of research is the aforementioned study by Meijer et al. (2009) who provide an evidence-based overview of the current state of the residential building stock for eight northern European countries along with current renovation data. Comparisons are made on the characteristics, physical quality and developments of the residential building stock.

Another problem observed in building stock research are the long-term changes in building demand in Europe. It can be assumed that Europe will sustain a disparity between regions, some experiencing growth, others shrinkage in both the size of their economies and population. Although the demand for dwellings in Europe might still grow overall, there are rural and urban areas where vacancies in housing stock will increase dramatically due to population loss. This, as a result, will have a large influence on construction and demolition activities. In this respect sustainability has the potential to be a major criterion in housing stock management and, in particular, in the decision processes about dwelling replacement or life-cycle extension. In this context it has been stated that “sustainable management of the built environment requires the preservation of both natural capital and man-made resources, which means using artefacts for as long as possible” (Kohler, et al., 2009, p. 451). It is believed here that immovable heritage and its preservation can have a real impact on environmental sustainability.

In her research on the long-term building stock survival and intergenerational management, Hassler (2009) states that

— *by the beginning of the 21st century, the proportion of buildings that had survived more than 100 years represented on average only 10-15%. While the built environment artefacts can survive for hundreds of years, in Western Europe, however, about half of the currently existing stock belongs to the recent age categories, originating after the Second World War (p. 553).*

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Thereby she observes that the pressure for developing historic centres resulted in the disappearance of (often protected) views of cities and facades, as well as diverse “interior changes” and losses of historic substance. Hassler emphasises that what is needed is an understanding of the underlying drivers that can reduce this “churn” (demolition and rebuilding) in the built environment and addresses this through the analysis of the complex relationship between the building stock as a whole and that small fraction of the stock that can be considered the built cultural heritage. The natural ageing of this subset is artificially slowed by institutional regimes. Hassler’s analysis of the robustness of these approaches indicates an appropriate role model for the sustainable management of the entire stock.

LIFE CYCLE ANALYSIS AND LIFE CYCLE COSTING

Whereas building stock information research focuses on macro and aggregate approaches, Life Cycle Analysis (LCA) and Life Cycle Costing (LCC) provide information on the impact of individual immovable heritage structures on the environmental sustainability.

Most existing buildings, in particular immovable heritage and post-WWI domestic dwellings, do not compare favourably with the energy efficiency of new built structures. However, they can often be fitted with energy-saving insulation — which requires different skills sets from those suited to more modern buildings — in order to help them meet the efficiency standards to move towards a more sustainable environment. In addition, replacement will almost always be more environmentally costly than refurbishment. Reusing and repairing existing building stock has clear environmental benefits, with increasing evidence that the level of energy efficiency of pre-1890 public buildings at least matches, and sometimes exceeds, that of the most sophisticated modern buildings. From an environmental standpoint, the embodied energy of existing buildings is one of the most compelling arguments for preserving them. Embodied energy is a quantitative measure of the energy consumed during the extraction, manufacture and transportation of materials as well as the construction phase. When a building is demolished, the environmental cost includes the lost embodied energy and increase in landfill waste.

All these aspects can be incorporated into a LCA of a single building. The basic principle of LCA is environmental management which assumes that the prod-

uct impact on environment is considered for the entire lifetime of the product. LCA may be applied not only to the construction, but in almost every sector, for example, optimisation of manufacturing processes. Currently, there is no particular unambiguous method to apply LCA, flexibility is possible as long as the standard (ISO 14040) is complied with. The scope of the research on different phases can be further modified as LCA is an iterative study.

It is likely that many LCAs have been conducted on individual (historic) buildings, in the context of demolition vs life-cycle extension decisions. However, none of these studies have been collected in the survey. The explanation of this situation may be a lack of awareness of the opportunities that this analysis method offers. There is a clear need for rapid and comprehensive evaluation methods to measure the environmental resource value of individual historic buildings.

3.8.5 IDENTITY CREATION

Identity, identification and pride of place are, of course, influenced by a wide array of factors and in cases when culture does not constitute a key marker of the place, other features or resources will form a part of these categories (e.g. welfare, the location of important political or military institutions, technology or industry). However, in many cases in Europe it is cultural heritage that determines the nature of these categories. Various researchers indicate that engagement with cultural heritage (at local and national levels) can lead to a greater national awareness, social cohesion, sense of a place and identity. Heritage seems to be an important distinguishing factor for towns and cities, however, the awareness of heritage and appreciation of its significance do not necessarily translate into interest in heritage in terms of protection or investment in restoration, or simply expanding one's knowledge.

The relation between cultural heritage and identity was shown by a research conducted in 2002 on a representative sample of citizens of Latvia. According to the research, 80% of respondents stated that cultural heritage played a significant role in the formulation of the image of Latvia (Kļāve, 2002, p. 17). Therefore, it plays a vital role in reinforcing the cohesion of society — 91% of inhabitants of Riga and 83% of respondents living outside the capital city could name one or several objects belonging to the category of cultural monuments (p. 12) — it is one of the factors that shape national awareness, as well as a determinant of creation of an integrated and democratic society. As the results of the research suggest, a large majority of Latvians can name monuments in their country and they claim that the responsibility for their preservation should be taken by both the state authorities and citizens. The key findings included:

- firstly, recognisability of cultural heritage among Latvia's population is high, which is proven by the respondents' ability to name cultural monuments in the vicinity of their places of residence;

● secondly, positive trends can be identified in the inhabitants' understanding of cultural heritage and its importance in the national economy and tourism, in creating the image of Latvia and democratic, integrated society, as well as the role of society in the field of safeguarding cultural heritage (p. 5).

However, as noticed before, the understanding of the role of heritage does not translate automatically into an interest in it:

Only slightly more than one tenth had been interested in the protection and restoration of cultural monuments, as well as studies of various cultural monuments that had been conducted. It can be concluded that before turning to public awareness, raising inhabitants' interest in cultural heritage and possibilities for using it should be promoted (p. 5).

The fact that cultural heritage is an inherent part of the identity of a place was proved also by a research on the issue of constructing a desirable image of a town conducted in 206 selected Polish town councils by Stanowicka-Traczyk in the years 2003–2005. Cultural heritage was the third most often mentioned factor that might be distinguished in the strategies of constructing the image of Polish towns (34,7%). As the researcher explains, these are the particular features of a given town that make it stand out on the market of numerous competing towns, determining its individuality and character (Stanowicka-Traczyk, 2007, pp. 54-55).

The report on the social impact of heritage projects financed by the Heritage Lottery Fund in the UK, published in 2008, indicated that the projects undertaken had led to an increase in the awareness of their own identity among the inhabitants — 58% of project managers pointed to this fact. One of the listed examples was a project called *I Am Me — Religion and Faith from an African Heritage Perspective* (which referred to the material and non-material heritage, yet it is worth mentioning to illustrate the impact itself) realised by the Somali Integration Society from Wales. The report states that the project:

— has highlighted the contribution of different Muslim communities, for example the Somali community in the Butetown area of Cardiff, through a bilingual English and Somali exhibition including a replica of traditional Somali house. The project has also aimed to increase understanding between different communities through a variety of other events designed to increase awareness of African cultures including a cultural parade and fashion show; Eid-ul-Fitr and Eid-ul-Adha Ramadan celebrations; “ladies night” including cultural music, dance and a fashion show; a football tournament; a poetry recital; and a Sudanese book fair. One of the project partner organisations, the National Museum of Wales, confirmed that the project activities had contributed to a sense of pride in the multicultural heritage of Cardiff. It was recognised that despite there being a Somali community settled in Butetown for over a century that history had not been well documented before (Applejuice Consultants, 2008, p. 51).

The sense of identification with a place, being proud of it, as well as the links between cultural heritage and aesthetic and symbolic values were shown in research conducted in Poland in 2010, resulting in the report *Analiza wpływu in-*

westycji w infrastrukturę kultury i turystyki dofinansowanych z funduszy strukturalnych na rozwój społeczno-gospodarczy poszczególnych gmin/powiatów województwa śląskiego [Analysis of the impact of investments in infrastructure of culture and tourism subsidised by the structural funds for the socio-economic development of selected boroughs and counties of the Silesia Province]. Its aim was to define the impact of infrastructure projects in tourism and culture, realised with subsidies from the 2004–2006 European Regional Development Fund, on the socio-economic development of boroughs and counties in the Silesia Province (Murzyn-Kupisz & Gwosdz, 2010). As the authors indicated, from 57 analysed projects almost half (28) concerned the preservation or interpretation of cultural heritage of a given borough or county. According to the authors, the realised projects enhanced sense of pride among the inhabitants:

- *Thanks to them towns and boroughs are seen as more dynamic and active, while the residents gain the sense of greater influence. Most often, this impact is most pronounced in smaller towns: in Marklowice, Żywiec (yet only in case of the castle, not the roller skating facility), Pszczyna (both development projects) [restoration of the castle and the display pen for European bison — authors' note] and Jaworzna respectively, where the increased sense of pride was experienced by 75% to 90% of respondents (p. 132).*

In the case of Pszczyna, the restoration of the castle and its surroundings dating back to the 15th century had a positive impact on the image of the town, as well as a catalyst in improving the general appearance of the town centre. As the report indicates:

- *According to the beneficiaries, the project of the restoration of the castle may attract visitors, enhance the sense of pride of local inhabitants, as well as increase their participation in culture. The beneficiary states that the project could most of all influence the development of other activities related to tourism in the area, i.e. restaurant and hotel businesses. The castle is mostly visited by tourists from outside of Pszczyna, while the residents use its surroundings for recreation, not necessarily visiting the inside of the castle, hence for them what is important is the appearance of the outside of the mansion (p. 102).*

Therefore, cultural heritage may also positively influence participation in culture. The authors of the report notice that local inhabitants “appreciate the work for the protection of cultural heritage and the improvement of the overall appearance of the town” (p. 104).

The research conducted in 2004 in the UK on country houses also confirms the link between heritage and national identity. The research included 454 visitors of six selected country houses in Yorkshire, Buckinghamshire, Essex and Northumbria. As Smith suggests: “visitors used the country house performance to remember and reinforce their national identity and the place of England in the Western cultural world” (Smith, 2009, p. 44). The country house meant for the respondents also a part of their identity, which they saw as contrasting with identities of people from other countries, for example from the United States:

- *A continuum — a continuing history: America does not have a heritage*

— *Unlike USA — we are keeping history — it's not Disneyland — it's British — set out of buildings which will always be there unlike today's buildings (pp. 44-45).*

The formulation of identity by means of heritage can also be linked with the sense of loss stemming from the de-industrialisation of given areas. This aspect was indicated by Smith in reference to the UK in the 1970s and 1980s. Revitalisation and the development of industrial heritage tourism has an impact on the formulation of identity:

— *The rapid de-industrialisation of Britain in the late 1970s and 1980s created an innate sense of loss, especially among northern communities. Although Hewison (1987) criticised the British people's nostalgia for the industrial past, it is clear that there was a need to fill the gap that was left in many people's lives and livelihoods as a result of de-industrialisation. The development of industrial heritage tourism has often helped to regenerate areas in decline, boosting the local economy and contributing to people's sense of identity and self-worth (pp. 95-96).*

The existence of a relationship between the historic built environment, a sense of place and social capital was confirmed by the research conducted in 2009 in the UK among two age groups: adults and teenagers. Research among 13-14-year-olds was realised on the basis of a questionnaire distributed by schools, whereas the research with adults was made via telephone calls. All interviewees agreed that the built environment has an important influence on sense of place (Bradley, et al., 2009, p. 12). However, the second hypothesis about the existence of a link between the historic built environment and social capital was less clearly supported by the interviewees. The authors state that “one suggestion was of the link between pride in and identification with a place [...] tending to support growth in social capital through forms of local engagement and the lower likelihood of moving away” (p. 12). In both parts, the interviewees indicated the extent to which they agreed with the following key statements:

- the area means a lot to me;
- I could be equally happy living somewhere else;
- I would rather live somewhere else;
- I am interested in the history of my area;
- I care about what my area looks like;
- I really feel I belong to my area;
- I am proud of where I live (p. 32).

The conclusion of the research was that “Society has much to gain from strengthened communities whose residents have increased social capital. There is evidence from many quarters that a range of beneficial outcomes can flow from people having a strong sense of place” (p. 49). Yet, the beneficial outcomes in question were not defined.

The research published by the National Heritage Board of Poland in 2013 — which has been frequently referred to in this report — was conducted on a representa-

tive sample of Poles and supported by qualitative research carried out via focus group interview method. Similarly to previous examples, it also indicates that heritage is a factor in constructing collective identity. Asked what the greatest value of a monument is, the respondents stated the following: 62% mentioned the fact that it was a testimony of collective history; 18% that it was authentic; 11% pointed to the material value; 9% — to its aesthetic value (Kozioł, et al., 2013, p. 30). The report summarising the research includes a statement that cultural heritage offers “a possibility to transmit norms, values and models of behaviour. What is significant is the reference to the so-called small homelands with their traditional links and values, which can be revealed and transmitted through getting to know the local heritage” (p. 32). Heritage is also directly involved in the formulation of so-called pride of one’s own country. As the report indicates:

— *Being proud of one’s own country translates into the concern for its future, and the interest in local heritage enhances the need to perform actions that ensure its preservation, at the same time restoring the belief in one’s ability to influence one’s surroundings. The participation in the promotion of heritage encourages one to take up and learn how to engage in civic activity, which, on the other hand, translates into the level of social participation (p. 32).*

Responding to the question: “Do monuments located in a given town improve the standards of life of local communities?” 44% of interviewees stated that they allowed one to be proud of their place of residence, what was the second most popular answer. The authors of the report further indicate that the pride of “our” heritage is “based on the declared knowledge of the closest surroundings and its historic monuments: 80% of respondents know at least one monument in their vicinity” (p. 35).

3.8.6

LABOUR MARKET

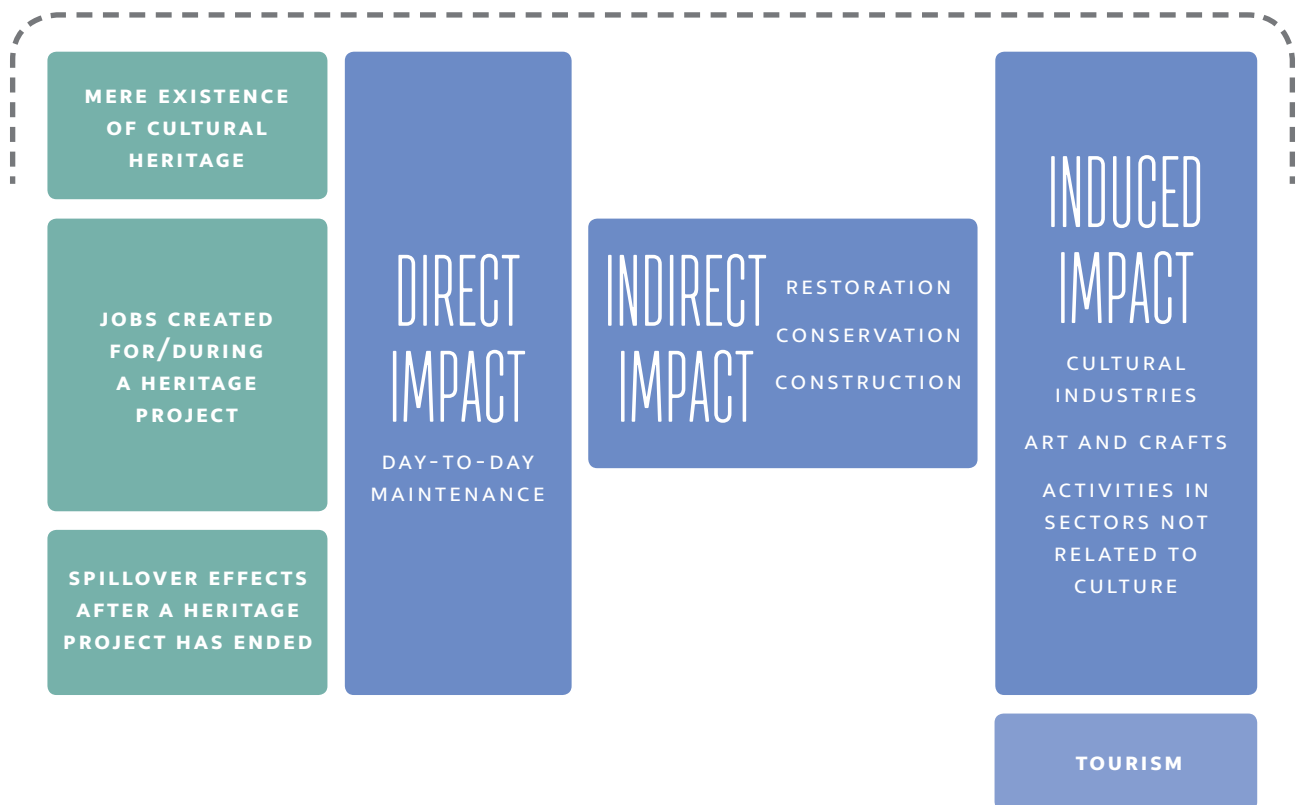
One of the basic criteria for the assessment of the impact of heritage in economic terms is its job creating potential. In the context of growing unemployment in Europe, research showing the impact of heritage on the job market seems particularly relevant. Cultural heritage has, in this respect, the potential to contribute to one of the EU’s targets for the coming years. As stated in *Europe 2020: A European Strategy for Smart, Sustainable and Inclusive Growth*, by 2020 75% of the population aged 20-64 should be employed. This aspect of heritage’s influence on the socio-economic context seems to be most widely acknowledged and relatively frequently researched in Europe.

As shown in Figure 3.11 the potential of cultural heritage for impacting the labour market, with a distinction made between jobs in daily maintenance of heritage, restoration works and inducing job creation in other sectors. However, a discussion on the matter of triggering employment by cultural heritage requires also the introduction of a further differentiation between: jobs created during

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implementation of a heritage-related project (such as conservation works or works related to the revitalisation of an area); impact of the heritage on the labour market after the project has been finished; and the impact which is generated by mere existence and functioning of the heritage site or monument. Out of all presented categories, direct employment in the heritage sector and jobs created as a result of a special project in the heritage field seem to be analysed most frequently. Special attention is also given to cultural heritage tourism which, generally speaking, consists in travelling in order to visit historical sites, monuments, and experience local customs, folklore, and which is an area that demonstrates one of most visible aspects of heritage impact.

POTENTIAL OF CULTURAL HERITAGE IN JOB CREATION



📌 **FIGURE 3.11.** THE POTENTIAL OF CULTURAL HERITAGE FOR INFLUENCING THE LABOUR MARKET

SOURCE: OWN.

According to the calculations presented by Nypan (2009, pp. 15, 26), the number of persons directly employed in the cultural heritage sector (administration, research institutes and businesses executing restoration or maintenance works on cultural heritage objects/sites) in Europe amounts to 306,000. Al-

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though this might seem like a small number, it is noteworthy that the potential of cultural heritage employment-wise lies not only in creating jobs directly in the sector but also in inducing job creation in other sectors; indirectly created jobs amount to 7.8 million person-years and that could already be treated as a significant number. Moreover, what is crucial is that the cultural heritage sector is estimated to produce approximately 26.7 indirect jobs for each direct job, much more than for example the car industry with the multiplier amounting only to 6.3.

One of the most quoted studies regarding this subject is the one by Greffe (2004, pp. 302-304), presenting a specific calculation for France. According to his study, in 2003 there were 68,019 full-time jobs in heritage institutions (direct impact) in France, 42,714 full-time positions in conservation and architecture sector (indirect impact), whereas induced impact manifested itself in 261,856 jobs in arts and crafts, cultural industries and entrepreneurial activity not connected with culture. Cultural tourism offered 176,800 jobs. The potential of heritage for creating employment apart from the most obvious sector – tourism, often neglected in popular discussions, should be noted here. Furthermore, Greffe claims that every 10,000 visitors in heritage institutions in France contribute to maintaining 1.15 full-time positions and creating 0.15 part-time positions in these institutions.

JOBS DIRECTLY RELATED TO HERITAGE

In many countries direct employment in the cultural heritage sector has been counted and usually the numbers can be drawn from national statistics offices. For example, Central Statistical Office of Poland presented an estimation of 66,235 full-time job positions for 2011 in what could be extracted from their data as heritage. That included employment in museums, libraries, quasi-museum institutions and archives (both the administrative and technical positions as well as content-related jobs). It has to be noted here that statistically heritage is rarely treated as a separate field and the data has to be extracted from more general information on culture (often put together with sports and tourism), what might prove difficult.

Surprisingly job positions related directly to heritage (but not in the heritage institutions) are not frequently analysed in European research. A study commissioned by Association Européenne des Entreprises de Restauration du Patrimoine Architectural provides one with data on a number of positions created in sectors directly related to heritage in several European countries. As the Table 3.7 illustrates, the number is around over several thousands of positions in areas directly related to heritage. At the same time, the author points out the difficulty in assessing the scale of employment which is related to various means of data collection and their categorisation in particular countries. Hence, these numbers should be treated only as rough estimates.

📊 **TABLE 3.7.** NUMBER OF JOBS DIRECTLY LINKED TO HERITAGE — AEERPA SURVEY

COUNTRY	HERITAGE SERVICES	RESTORATION WORKS	HERITAGE WORKS	TOTAL
BELGIUM	5,450	2,500	5,000	10,450
SPAIN	20,000	3,000	13,000	33,000
FRANCE	20,000	9,949	42,714	62,714
ITALY	18,000	10,500	23,000	41,000
UNITED KINGDOM	35,000	35,000	100,000	135,000
ROMANIA	14,000	1,000	4,000	18,000

SOURCE: Greffe, 2006, p. 5.



This example could be complemented by studies presenting data in other countries. In Poland, for example, one of the few, if not the only, study was performed in 2001 by Jaskanis and Kościelski. By using questionnaires on conservation works financed by the state that were filled in by regional staff of the Service for Monuments Protection, they estimated that if one converted the annual employment in conservation works into full-time job positions, it would equal to a number of 7,400 newly created positions (2002, p. 37).

A number of specialists (e.g. Nypen, Murzyn) draw one's attention to the fact that cultural heritage is rather a labour intensive sector, which could be seen as an additional benefit of the sector when compared with other sectors characterised by the tendency to mechanise and modernise and then reduce employment. As Nypen notes, "the whole sector is characterised by a huge backlog on necessary maintenance work, so the sector has the potential to employ many more people" (2009, p. 16). Rypkema adds that "[a]s a rule, new construction will be half labour and half materials, while rehabilitation will be 60% to 70% labour with the balance being materials" (2009, p. 114). Moreover, this labour is purchased locally "employing carpenters, painters and electricians from across the street" (p. 114). Jaskanis and Kościelecki (2002, p. 38) conclude their study with a statement that the increase in the expenditure on monument protection (meaning expenditure on conservation works) is almost directly proportional to the creation of job positions in the conservation sector. This high employment content could also be confirmed by the World Bank Study (2001, p. 52) which shows that for every 1 million USD invested in building rehabilitation 31.3 jobs are created, whereas the same amount invested in manufacturing industries brings only 21.3 positions to the labour market.

SPECIALISED SERVICES, MATERIALS AND GOODS

Day-to-day maintenance as well as necessary conservation works require purchasing specialised services (conservation works, construction, architectural design), which helps maintaining jobs in the sector as well as in the education and training sector. If one turns again to the study by Jaskanis and Kościelecki, one will find that around one third of people employed in conservation works carried out on immovable heritage in the year of the study (2000) were specialists, the rest of them — manual workers. In the case of works performed on movable heritage (e.g. altars, pulpits in churches, sculptures, paintings and other furnishings) the proportion was the opposite — with two thirds of specialists and one third of manual workers working for a project (2002, pp. 29-30, 36). Furthermore, it is worth noting that cultural heritage creates demand not only for specialised services but also for very specific materials and goods. Therefore, it might influence employment in companies producing professional materials for conservation works (such as gilded elements, sculpture and painting products) as well as traditional building materials (e.g. shingles, roof tiles, masonry, etc.).

Referring to this issue, Greffe points out the problem of the increasing skills shortage raised by restoration companies (2006, p. 16). The problem seems to be three-fold: quantitative (resulting mainly from the closure of traditional training centres), qualitative (caused by the shift of vocational courses to higher level and a tendency to give more abstract and general knowledge rather than practical skills) and geographical (lack of training establishments in the vicinity hinders young people from choosing such a career). It seems, therefore, that solving this problem on the policy level might contribute to generating valuable job positions in Europe. An interesting point is made by Della Torre (2010) who advocates for planned conservation (defined as an innovative long-term procedure that links a top-down approach — prevention of territorial risks, such as floods, quakes, abandon, neglect — and a bottom-up approach — everyday behaviours of stakeholders, i.e. architects, conservators and users) and argues:

— *[Its] attempt is to go beyond the basic statement that heritage counts because of its impact on economy of tourism. The planned conservation research program focuses on external benefits of preservation processes. If human capital is seen as an interesting parameter to evaluate an economy, preservation counts because of its impact on capability to doubt, to learn, to innovate. In other words, focus shifts from heritage as a given asset to preservation processes as opportunities to increase intellectual capital (pp. 143-144).*

In his opinion it is not only the end product of a restoration process that matters (better conditions of built heritage and therefore more probability of its contemporary use), but also the fact that restoration produces knowledge. One notable example that could be quoted here is the Schönbrunn Castle, one of the top tourist attractions in Vienna but also one of the leading research centres in Europe in the field of conservation technologies contributing to the success and the fame of the property (p. 151).

Traditional knowledge, methods and techniques could be treated as an advantage to be used in overcoming a crisis in the construction sector. At least this is an idea presented by Salvador et al. (2007) who suggest investing in cultural and heritage economic poles (such as hubs or clusters attracting cooperation and networking between different agents that could serve as focal points for further development) as a way to push the construction sector into a new stage of development (by building up public strategies of investing in renovation of cultural heritage).

TOURISM AND SPILLOVER EFFECTS

Although there are many ways in which cultural heritage affects local economies, it is usually tourism that comes to one's mind first. In a way it is rightly so, as it has been demonstrated that heritage visitors have greater impact on a local economy than any other tourists because they tend to stay longer and spend more money (Rypkema, 2009, p. 117). And as the report of Europa Nostra (2005) notes,

— *[t]ourism is one of the most important and fast growing sectors of the world economy and of the European Union. In particular, Europe is the world leading tourism destination. It contributes at a rate of at least 4% to the EU GDP, accounts for more than 6 million direct jobs and for more than 2 million businesses, most of them being small and medium-size undertakings. In addition, according to some estimates, more than 50% of tourist activity in Europe is driven by cultural heritage and cultural tourism is expected to grow the most in the tourism sector (p. 11).*

While heritage tourism is, as defined by Zeppel and Hall:

— *an encounter with or an experience of being part of the history of a place through visiting historic sites, monuments, and landscapes. It focuses on learning and includes the experience of local traditions, social customs, religious practices and cultural celebrations. Historical tourism is a form of heritage tourism: its main focus is to stress the experiences of the past (1992, p. 53).*

Haspel (2011) suggests that not only objects from the remote past are popular, but also testimonials to quite recent events:

— *Indeed, it could be said that for travellers fascinated by contemporary history, Berlin is what the ancient Athens or Rome are for art tourists. The surviving remnants of the Berlin Wall, the authentic sites and testimonials to persecution and resistance during the German dictatorship of the twentieth century [...] are popular [...]. Shared inheritances [...] play a role in forming our historical and aesthetic education, and can be activated as a resource accessible to tourism (p. 908).*

Considering the impact of cultural heritage on the labour market, heritage tourism is one of the areas where this influence is very strongly visible. To quote just a few of the examples: the direct, indirect and induced employment effect of heritage tourism in the UK is estimated at 392,812 jobs (including natural

heritage: 742,419) and the number seems to be growing (El Beyrouty & Tessler, 2013); research conducted in the North East region of the UK proves that heritage supports over 7,300 jobs, mostly in the tourist and hospitality industry. Over 6 million tourists spend annually over 180 million pounds providing jobs to over 5,400 people in the tourist sector (North East Historic Environment Forum, 2005).

The evidence of job creating potential of cultural heritage can be illustrated also through a more detailed discussion of case studies. One of them could be the case of Pont du Gard, an ancient Roman aqueduct bridge that crosses the Gardon River in southern France, where the effects of tourism on the local economy were measured. A survey conducted using a representative sample of 1,100 visitors (both tourists and local community members who came for a short excursion) illustrate how many jobs are sustained/created thanks to the existence of Pont du Gard as a tourist attraction. The Table 3.8 shows the social spillovers calculated on the basis of annual costs of one job in the tourism sector (33,000 EUR). In turn, social spillovers generated by purchases are estimated on the basis of average annual cost of a job in France (42,000 EUR). It was estimated that a total number of visitors (1.1 million per year) generates 1,209 jobs. Each visitor of Pont du Gard spends on average 3.27 EUR on the site and 123 EUR outside it (excluding transport cost). 49% of income generated by Pont du Gard as a tourist attraction is made in the region of Languedoc-Roussillon. Directly in relation with the object 136 job positions were created; indirectly Pont du Gard induced 1,073 job positions.

☛ **TABLE 3.8.** IMPACT OF POND DU GARD IN TERMS OF EMPLOYMENT (NUMBER OF JOBS)

	DISTRICT OF NÎMES	GARD	LANGUEDOC-ROUSSILLION	PROVENCE CÔTE D'AZUR	RHÔNE-ALPES	OTHER
DIRECT SOCIAL SPILLOVERS	92	100	103	7	2	0
INDIRECT SOCIAL SPILLOVERS OF TOURIST SPILLOVERS	184	281	478	445	79	70
TOTAL SOCIAL TOURIST SPILLOVERS	276	381	581	452	81	70
SOCIAL SPILLOVERS GENERATED BY PURCHASES IN PONT DU GARD	6	14	19	2	0	2

SOURCE: Réseau des Grands Sites de France, 2008, p. 14.

📌 **TABLE 3.9.** SPILLOVER EFFECTS OF PONT DU GARD AS A TOURIST ATTRACTION

VISITORS A YEAR	1,1 m
COSTS INCURRED BY THE VISITORS (TOTAL)	EUR 263 m
COSTS INCURRED BY THE VISITORS OUTSIDE PONT DU GARD SITE	EUR 135
JOBBS CREATED DIRECTLY AND INDIRECTLY	1,209
INCOME FROM TAXES (LOCALLY AND CENTRALLY)	EUR 21,5 m

SOURCE: Réseau des Grands Sites de France, 2008, p. 5.



The impact of heritage institutions on the labour market is also illustrated by Greffe's research (2011), who estimated the number of jobs generated by the Louvre (apart from those employed directly by the museum). Three methods were taken into account in measuring the impact — time spent, relative motivation and essential motivation approaches. Depending on the approach used and the average salary per year when the research was conducted (2006), the estimate was from 10,292 to 21,225 jobs.

The example discussed before of the Valley of Palaces and Gardens in south-west Poland, presented by Murzyn-Kupisz, generated supply effects equal to 32 jobs, while income effects led to the creation of an additional 12 jobs. Two jobs in a palace generated one additional job in companies providing services for tourists in the region (multiplier of 1.552). Total spillover effects were estimated at 169.15 jobs (first, second and third tier) generated in the region (Murzyn-Kupisz, 2012, p. 251).

REVITALISATION OF CULTURAL HERITAGE AND JOB CREATION

The significance of industrial heritage needs to be noted here, for it has significant potential for new use and adaptation for new functions. Turning the redundant Bankside Power Station into a museum of contemporary art — Tate Modern, is a good example of the role industrial heritage can play in transforming whole neighbourhoods. After five years of construction works, the new museum was opened to the public on May 12, 2000. "In only one year Tate Modern has become the third most visited tourist attraction in Britain and the anchor attraction on the South Bank, drawing attention and people to a previously undiscovered and undeveloped area" (Tate Modern, 11 May 2001). Before the works started (1994) McKinsey & Company assessed the potential economic impact of the Tate Modern as 30-90 million GBP benefit to the economy (13-35 million GBP of that specifically to London) and 790-2,440 jobs generated in London (400-1,000 of them in the neighbourhood of Southwark). In 2001 these figures were revised to prove that that 2,100-3,900 jobs were created (of which between 1,390 and

1,890 in Southwark) and between £75 and £140 million was generated to the wider economy with 50-70 million GBP specific to London (McKinsey & Company, 2001, p. 2). Tate Modern itself has created 467 jobs in addition to the 283 opened during the construction phases. 30% of those employed at Tate Modern come from the local area. Moreover, it is important to notice that the number of hotel and catering businesses in the local area has increased by 23% from 1997 to 2000. This has led to an estimated 1,800 new hotel and catering jobs in the Southwark area. Opening Tate Modern has been one of the major factors in the regeneration of the South Bank and Bankside. 26% of people interviewed in a recent MORI poll associated the area with the gallery (McKinsey & Company, 2001) (Tate Modern, 11 May 2001).

On the other side of Europe in Silesia Jarczewski and Huculak conducted research on the new use of post-industrial areas in one of the most industrialised provinces in Poland (especially heavy industries, mining). Results of their research suggest that post-industrial areas were most often transformed into cultural facilities (museums, galleries, concert halls), service facilities (shopping malls, supermarkets, office buildings), places for entrepreneurship development (incubators, industrial parks, economic activity zones, universities, new developments) (Jarczewski & Huculak, 2010, p. 34). One of the examples is the transformation of the area of the Kleofas mine (opened in 1840) into a Silesia Shopping Centre, where three historic mine buildings and shafts were preserved. This adaptation of the area to a new function created 2,000 new jobs (p. 36).

3.8.7 REGIONAL ATTRACTIVENESS AND COMPETITIVE ADVANTAGE

Despite an increasing debate in literature on the role cultural heritage might play in contributing to regional competitiveness, the field remains vastly unexplored. Available texts might be categorised according to a target group in the competitiveness game: investors, tourists, or residents. The relation between tourism and cultural heritage has been studied most frequently, however, not that many studies analysed the problem from a regional competitiveness angle.

The question about the economic gains of restoration works finds an answer not only in the direct result consisting in creating new jobs, but also in the frequently quoted, yet difficult to assess, contribution to the neighbourhood's atmosphere (genius loci), making the place more pleasant and attractive for tourists and potential new inhabitants. In the competition for new investors, visitors and residents it is an especially vital point. Another issue of great importance is the uniqueness of a place which cultural heritage greatly contributes to. A special case here are historic cities which need to take full advantage of their individual, distinguishing qualities if they are to be economically successful in today's

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highly competitive world. It is no longer sufficient to copy one's competitors; it is essential to stand out from them. Historic cities start with one enormous advantage: their unique inherited qualities. Lose those, and all is lost (Rodwell, 2011, pp. 103, 107-112).

📌 **TABLE 3.10.** SELECTED LITERATURE ON IMPACT OF CULTURAL HERITAGE ON ATTRACTIVENESS AND COMPETITIVE ADVANTAGE

CULTURAL HERITAGE AS ATTRACTIVENESS AND COMPETITIVE ADVANTAGE GENERATOR	
FOR INVESTORS	Landeshauptstadt Düsseldorf, 2007 Haspel, 2011 McManus & Carruthers, 2014
FOR TOURISTS	Alberti & Jessica, 2012
FOR RESIDENTS	van Duijn, 2013 Marlet & Poort, 2005 Marlet & van Woerkens, December 2005

SOURCE: OWN.

ATTRACTING INVESTORS

Investment decisions are mostly taken on grounds of availability of resources in a given location, access to market, potential clients and costs. One might ask if apart from obvious examples of businesses related closely to heritage — for example tourism, conservation or renovation of monuments — the location of heritage in a certain place has any effect on business decisions. The answer could be two-fold. First of all, heritage has become a part of a city narrative and its brand. Ashworth (1993, p. 37) emphasises that the atmosphere of a historic city or even a single historic building conveys the message of long-term credibility, reliability and probity and, in many cases, prestige or artistic patronage as well. For the businesses where these aspects prevail in their PR message, investing in the proximity of heritage might prove to be of great value. Studies conducted in Germany (Haspel, 2011) prove, for example, that heritage-related locations, such as commercially-used listed buildings, tend to be treated as luxurious business locations. Such properties are sought-after, particularly for commercial purposes, and have confirmed the profitable character of the investments. To demonstrate this tendency, Haspel quotes studies (pp. 906-907) conducted by Jones Lang Wootton in Hamburg, which demonstrate that such a location is positively received by the employees (87% of them declared a better work atmosphere after moving to a historic house) and clients (73% of employees declared positive reaction from their clients). Another study carried out in Germany also testifies to the statement that cultural heritage could be one of the soft location factors

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when it comes to choosing a site for a new investment. It seems to be especially true for IT businesses and those which hire highly qualified and educated staff (Landeshauptstadt Düsseldorf, 2007).

In the UK, an example where cultural heritage has played a key role in generating the inward investment in a city district is the Cathedral Quarter in Belfast, as described by McManus and Carruthers (2014). The Cathedral Quarter is one of the oldest parts of Belfast, characterised by its rich industrial and religious heritage, but it fell into decline during the 1970s due to the political unrest. A regeneration scheme of the district was launched in 1997 by reevaluating its historic environment and upgrading its public spaces. Noteworthy is one of the conclusions by McManus and Carruthers: investments in the quarter which were not linked to the cultural heritage of the area had produced little or no effects in terms of increasing the appeal of the area for investors. The authors therefore conclude that the development of the Cathedral Quarter evidences that culture, including cultural heritage, can act as a generator for economic activity by attracting people or investors who will use non-cultural facilities, thus making the heritage the driver of the inward investment from these non-cultural services (p. 92).

ATTRACTING INHABITANTS

According to Richard Florida's popular, yet highly criticised and controversial theory of the creative class, this class (valuable from an economic point of view as one that attracts investors, especially within the field of new technology and innovation) appreciates places with particular charm and cultural amenities. Attempts to prove this thesis were undertaken by e.g. Marlet and Poort (2005), who claim that the presence of cultural heritage attracts persons with university degrees. Similar observations are presented by O'Brien (2012), who after examining the case of Dublin and its "talent hub" strategy based on liveability of the historic city core came to a conclusion that differentiating the city with cultural and heritage assets and ensuring their authenticity contributed to attracting a young and creative class as well as their potential employers.

The research of other Dutch scholars, Marlet and van Woerkens (December 2005), who tried to verify Florida's thesis that representatives of the creative class are attracted to a given place by three factors (3T): technology, talent and tolerance, does not actually prove the validity of Florida's thesis about openness and tolerance, yet it indicated another factor that is significant for the present analysis. The Dutch creative class chooses work places and places of residence by taking into consideration aesthetic values, the presence of historic buildings and the beauty of natural environment. When researching the distribution of the creative class in 31 of the largest Dutch cities, Marlet and van Woerkens discovered a correlation between job opportunities (omitted by Florida), urban amenities and the presence of historic architecture in a given city.

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By using a horizontal sorting model to estimate the willingness to pay of different types of households for living in or close to a historic city centre, Van Duijn established that more well-off households (thus having more choice and more opportunities to realise their needs) tend to choose houses in the proximity of a historic city centre. Moreover, there is a heritage effect visible when the historic city centre has the potential to influence the attractiveness of a larger area (Van Duijn, 2013). The author claims that the “success of a city does not only depend on job opportunities and transport facilities, but also on cultural heritage” (p. 58). The research was based on a residential sorting model extended by accounting for spatial correlation between municipalities, combining the equilibrium sorting model and spatial spill-over effects. The impact of cultural heritage on the attractiveness of the city is a sum total of two effects. On the one hand, areas with historic architecture, especially historic city centres, are seen as more attractive. On the other, which is an indirect effect, attractiveness of the historic city centre creates favourable conditions for the emergence of shops, cafes, restaurants and others, which additionally improves the perception of this part of the city. These conclusions were drawn by the author from the research on the location preferences of households.

ATTRACTING TOURISTS

Tourism is one of the sectors frequently connected with cultural heritage. However, studies that link cultural heritage and tourism within the context of increasing regional competitiveness seem to be rather rare. Of the few that could be quoted, one was done by Alberti and Giusti and concerned the Motor Valley Cluster near Modena in Italy (2012), where thanks to regional identity and the heritage of the motor sport industry a new cluster was created. It combined motor industry companies, artisan and tourist organisations, sports facilities, institutions and both tangible and intangible heritage (museums, collections, archive, expertise and practices), that together foster the increase of tourism in the region. Basing on a theory review, Alberti and Giusti (p. 263) argue that the formation of clusters are indispensable to enable cultural heritage to succeed as the economic engine of regional competitiveness. The novelty of their approach consists in the assumption that the overall competitiveness of a region can be fostered by (industrial) heritage when a multisectorial and multidisciplinary cluster is created (as opposed to traditional industrial boundaries limiting clusters to either tourist or cultural, or to other sectors). Their research, based on a case study approach, developed a framework for culture and tourism cluster competitiveness, emphasising the potentially vital role of industrial heritage, cultural heritage and landscape.

3.8.8

RETURN ON INVESTMENT,
TAX INCOME AND GVA/GDP

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The fact that heritage is a public or a quasi-public good often results, among other things, in its needing to be financially supported by the state, otherwise in many cases it would not be able to survive. This might lead to a conclusion that cultural heritage is a burden and an expense for society (and the state). There are, however, some studies that prove that the public money invested in cultural heritage have a high return on investment when the impact/spillovers of a given heritage site are calculated. The scope of the identified research includes the costs and benefits generated by specific heritage sites in terms of income, taxes, contribution to GDP, taking into consideration its day-to-day maintenance or special investment projects (such as renovation, conservation, revitalisation, etc.). In several cases the studies discuss public subsidies for heritage (both privately and publically owned) and their validity and effectiveness. Besides assessing incremental monetary effects on GDP, tax revenues, personal income, jobs (for more on jobs creation see Section 3.8.6), etc., some studies use contingent valuation to include non-use values in the analysis of the benefits provided by the cultural heritage.

The literature review provides numerous theoretical descriptions of the methods of value assessment or the potential profits from investments in cultural heritage. However, there are relatively few actual examples of using the methods in practice.

DAY-TO-DAY MAINTENANCE OF CULTURAL HERITAGE

Nypan (2005) shows that the Borgund Stave Church (Norway) generates, based on the tax income only, 628.5% of return on the yearly investment (p. 10). The logic behind the calculation is as follows. Maintenance costs of the church are estimated at approximately 2 million NOK (about 245,523 EUR) per year with the income from the tickets reaching 1.75 million NOK. The church is the main attraction in the region bringing visitors to stay overnight, using the transport to get there, buying souvenirs and taking advantage of other attractions in the area (such as salmon fishing). It is estimated that thanks to its existence and functioning as a tourist attraction, 168 person-years per year is generated which translates into 11 million NOK of income taxes per year.

A similar calculation was done regarding the impact of the already discussed UNESCO Heritage Site of Pont du Gard in France, whose operator l'EPCC requires 7 million EUR yearly to maintain the site, out of which 3.4 million comes from the local and regional authorities. l'EPCC earns 3.6 million EUR by providing ser-

vices to the visitors (restaurants, parking lots, museum souvenir shops, tickets). The indirect impact is calculated at 135 million EUR (expenditure incurred by the visitors outside the heritage site). Tax income is estimated at 21.5 million EUR (Reseau des Grands Sites de France, 2008, pp. 5-6).

RENOVATION OF CULTURAL HERITAGE

There are few studies that summarise the impact of renovation of cultural heritage on the whole country. One of these would be the study by Rijksdienst voor de Monumentenzorg from 1998, quoted by Klamer and Zuidhof (1999, p. 37), who, though aware of the possible flaws of impact studies, refers to the impacts of restoration policy in the Netherlands. For each dollar granted by the government, 0.74 USD returns in the form of income taxes of people employed in restoration projects and VAT on materials used. Additionally, the macroeconomic effect that covers also the indirect effects of spending one dollar in restoration projects is 1.10 USD returned in tax receipts.

To support the argument about potential profitability of cultural heritage, Greffe (2006, pp. 6-7) conducted a calculation referring to a hypothetical situation when a private investor invests 100,000 EUR in a project involving the renovation of a historic building. In many countries it would entitle him or her to a tax deduction of 50%. Paying the tax at even 40%, he or she can “save” 20,000 EUR, which is a “loss” for public finances. Hence, one may conclude that tax deductions that are supposed to encourage private owners to take care of the historic sites they own, actually bring a loss to the state (because of lower tax income). Yet, this is not the case for state incomes include here the VAT tax, income tax paid by the contractors and income tax paid by persons working for this project. Greffe’s conclusion of this example was that state income was 23,860 EUR, which translates into a net gain of 3,860 EUR. This model does not include additional values, such as additional social security or cash flow benefits resulting from the time lapse or further income generated via associated additional tourism (tourist multiplier).

If one wants to see a real life example, there is a case of restoring an old Arab tower in Godella (Spain) called the Pirate’s Tower, analysed by del Saz Salazar and Marques (2005). They used the willingness to pay method to estimate the social benefits generated by the restoration of the Pirate’s Tower. The research showed that the benefits range from a minimum value of 395,642 EUR to a maximum value of 443,089 EUR (depending on whether the mean willingness to pay method considered is 52.95 or 59.30 EUR). Restoration works in the tower were calculated at 120,202 EUR, which is much lower than the benefits reported by the research, what could lead the authorities to conclude that such a project is seen as profitable to the local community.

There is also another study that instead of dealing with a hypothetical situation is actually trying to estimate costs and benefits of an actual project. Namely, re-

search on the restoration and renovation of the historic centre of Split in Croatia which is supported by the World Bank (Armaly, et al., December 2001). The project involved conservation, rehabilitation, restoration and preservation of heritage resources within the historic city centre (i.e. archaeological excavations in the basements of the Palace of Diocletian with the renovation of the Roman sewage system, the restoration of the southern façade of the palace and works in the buildings on the verge of ruination); what is more, it boosted economic initiatives within the palace area. After analysis of the costs and profits of the project, it was assessed that the costs amounted to 12.1 million USD. The profits included material and immaterial elements (e.g. the increase of the satisfaction of inhabitants and tourists from the renovated area). Immaterial profits can be reflected in such measurable processes as the increase in property prices and prices of goods sold in the old city centre, the growth of the number of tourists or the increase in their expenditure incurred in the area. Because most of the project's benefits would not be possible to record in terms of market transactions, the contingent valuation method was used. As part of the research, surveys among tourists and inhabitants of the historic centre of Split were conducted. They showed that tourists were willing to pay 37 to 51 USD as a contribution to the project of renovation. Using an estimation of the potential number of tourists and assuming that 50% of profits would remain in the city, it was assessed that in the course of five years the profits would amount to 41 million USD. The residents of the historic city centre were willing to pay even more for the improvement of the condition of the heritage — on average 158 USD. Taking into consideration the lowest price the interviewees were willing to pay (115 USD) the number would reach 2.1 million in the course of five years. Of course, renovated space is profitable not only for those living in the centre, but for inhabitants of all quarters of the city — if they were willing to pay even 10% of what the residents of the centre declared, the project would gain the additional amount of 14 million. As Table 3.11 illustrates, the internal rate of return amounts to almost 50%. The authors of the report claim that their assessments were very cautious and in fact the profits can be higher.

📌 **TABLE 3.11.** ESTIMATED COSTS AND BENEFITS OF THE RESTORATION OF HISTORIC CORE OF SPLIT

PRESENT VALUE OF FLOWS (MILLION US\$)						
COSTS	BENEFITS				NET PRESENT VALUE	INTERNAL RATE OF RETURN
	TOURISTS	RESIDENTS	OTHER	TOTAL		
12.1	40.6	16.0	3.0	59.5	47.4	49

SOURCE: Armaly, et al., December 2001, p. 172.

GROSS VALUE ADDED

The heritage sector is also a contributor to a country's Gross Value Added (GVA), even though such contributions to national economies are rarely calculated by national statistics offices. This consequently makes the data available difficult to compare due both to the lack of figures and the different methodologies used. Where such analysis is carried out heritage is usually combined with the cultural sector (which can be also linked with tourism). One example of undertaking such research is the Central Statistical Office of Poland. Its preliminary findings for the cultural satellite account showed the GVA of the heritage sector (including archives and libraries) as being 1.8 billion PLN (5.2% of the GVA of the whole cultural sector, which itself accounts for 3.2% of the global GVA) (Główny Urząd Statystyczny, 2014).

In some countries, ministries or heritage institutions commission studies to estimate the heritage contribution to GVA. According to the study done by Augusto Mateus and Associados (2010, p. 84) for the Portuguese Ministry of Culture in 2006, the cultural heritage sector generated 32.37 million EUR of GVA which is about 0.2% of the national GVA. ECORYS (ECORYS, Fitzpatrick Associates Economic Consultants, 2012) and ECOTEC (ECOTEC, October 2008), using the same method, established the economic impact of the historic environment for Ireland and Scotland respectively. Their method included developing estimates of direct, indirect and induced contributions of the heritage sector to output, income, employment and GVA. For the calculations, they included the so-called "inner wheel" of the historic environment sector, i.e. the built heritage construction sector and tourism sector. Aggregated amounts are presented in Table 3.12.

TABLE 3.12. TOTAL ECONOMIC CONTRIBUTION OF HISTORIC ENVIRONMENT SECTOR IN IRELAND AND SCOTLAND

	OUTPUT (EUR M)			EMPLOYMENT (FTE)			GVA (EUR M)		
	DIRECT	INDIRECT/ INDUCED	TOTAL	DIRECT	INDIRECT/ INDUCED	TOTAL	DIRECT	INDIRECT/ INDUCED	TOTAL
IRELAND	1,555	1,110	2,665	23,971	12,976	36,947	855	605	1,460
SCOTLAND	3,821	2,780	6,601	40,883	19,590	60,473	2,060	1,412	3,472

SOURCE: own, based on ECORYS, Fitzpatrick Associates Economic Consultants, 2011, p. 25, ECOTEC, October 2008, p. 45. For the sake of comparison data provided by ECOTEC in GBP was converted to EUR using an average 2007 exchange rate provided by the European Central Bank (<https://www.ecb.europa.eu/stats/exchange/eurofxref/html/eurofxref-graph-gbp.en.html>). 1 GBP = 1.4621 EUR.

Besides the studies that calculate the impact of the whole heritage sector, there are some that try to evaluate the contribution of a specific heritage project to GVA. English Heritage published a report (mentioned in the subsection on attractiveness of industrial heritage) that presents, among other data, the cumulative ten year GVA impact of five researched projects in the UK (AMION Consulting;

Locum Consulting, 2010). In their assessment of economic benefits (treated as marginal analysis of the additional impact of heritage-led regeneration), they used “on-street” survey, business survey and secondary data. Each approach attempted to measure the same impacts with varying results. For example, a regeneration project of the Regent Quarter, adjacent to King Cross station (where an attractive commercial site was created by combining new buildings with refurbished Victorian commercial buildings and a former varnishing works), seems to bring between 3.3 million GBP (“on-street” survey) and 10.3 million GBP (business survey) to GVA. The contribution to GVA by the Sheffield Cultural Industries Quarter Townscape Heritage Initiative (a centre for a diverse range of organisations and businesses providing creative and cultural services, employing around 3,000 people, designated as a Conservation Area) ranges from 2.8 million GBP to 3.2 million GBP, depending on the calculation method.

3.8.9 SOCIAL COHESION, CONTINUITY OF SOCIAL LIFE AND COMMUNITY PARTICIPATION

Social cohesion was defined by The European Union Open Method of Coordination as:

a set of shared norms and values for society which also encompasses the diversity of people's different backgrounds and helps to ensure that those from different backgrounds have similar life opportunities. It is the ability of cultural activities to help express specific cultures, while also developing strong and positive relationships between people from different backgrounds in the workplace, in schools, and within neighbourhoods (European Council, 2000, p. 8).

The World Bank's Learning Group on Participatory Development (1995) defined participation as “a process through which stakeholders influence and share control over development initiatives, and the decisions and resources which affect them.” Continuity of social life, finally, entails the perpetuation of tradition and identity in day-to-day life (Tönnies, 2010, p. 391).

Social inclusion can be stimulated by consultation with and the active participation of groups before, during and after a heritage project in locations of deprivation. A high level of civic engagement has been argued to be important to maintain local community relations (Nash, 2003, p. 12). Moreover, participation in these projects can result in a sense of ownership and an increased feeling of civic pride, which can in turn enhance the viability of the heritage project. A heritage project can be helpful in the enhancement of the confidence of communities, which can then result in stronger social capital. Furthermore, heritage projects can offer the possibility for the community to be involved in the regeneration, which will be beneficial to their locality. This allows new networks between different communities to be created, bringing together people from

different backgrounds, who can learn more about the place where they live and obtain a common ground. This means that looking after communities can both contribute to the conservation of heritage and be the outcome of a heritage project (Keaney, 2006, p. 23). Participating as a volunteer in such a project can stimulate individual confidence, in turn strengthening the ties within the community and increasing the feeling of well-being of the individuals. A heritage project can thus create an inclusive environment by enabling discussion and communication between different individuals and communities (Ela Palmer Heritage, 2008, pp. 8-9).

Social inclusion is very often studied using qualitative methods focussing on case studies, narrative arguments and interviews, that capture evidence of feelings and the experience of residents and participants. For this reason, evaluation of smaller projects is easier to accomplish than larger area-based initiatives where it may be difficult to gather results from a true cross-section of the community. However, as feelings of well-being or confidence are a contributor to social capital, qualitative analysis captures relevant subjective information.

Social impact is often set as an objective of a study and there are some case studies available in the European Union which prove that this goal can be successfully achieved. The impact areas presented by the studies include: fighting unemployment, raising awareness of both regional and personal identity, involving residents in community life, encouraging volunteering, fostering a sense of place, increasing social capital, supporting intergenerational integration, understanding and acceptance of social diversity, enhancing face to face interaction, a sense of belonging, and the formation of local communities.

STRENGTHENING COMMUNITY

Relevant in this context is a three-year project conducted in Slovakia from 2011 to 2014, established by a partnership between the Ministry of Culture and the Ministry of Labour, Social Affairs and Family of Slovakia and analysed in the study by Ižvolt and Smatanová (2014). The main objective of the project was to involve unemployed citizens in the restoration of selected monuments, together with the active participation of civic associations, under state supervision. At the same time, the project aimed to provide an efficient solution for the reconstruction and conservation of cultural heritage such as castles, whose conservation requires in large part manual work. Furthermore, the project strived to create work opportunities for the unemployed who are actively interested in the conservation of the historic built environment. This approach created the potential to deliver additional spillover effects with an overall positive impact on the local economy, the development of tourism and consequently accommodation and catering services, as well as to lead to the general recovery of regions suffering from high unemployment.

Within the framework of the project, teams were set up with job seekers working under the guidance of a skilled foreman. In the selection of the applicants, previous experience in the construction industry, good physical health and a sense of working discipline were taken into account. The first tasks of the teams included easier types of work, and as the participants started to demonstrate working potential, the work began to evolve into more professional activities.

After the completion of the project, the results appeared to exceed all expectations. Not only had the unemployment rate in regions with low economic productivity decreased, but long-term unemployed citizens had also been integrated in the process of heritage conservation and had been able to build up an improved connection with their historic built environment. In the context of social inclusion, this project seemed to have been relevant in the sense that participants had experienced an enhanced understanding of regional communities as well as their local traditions and cultural values. Furthermore, participating in the project helped them obtain new social relationships with other individuals, which led to the enhancement of their social capital (Ižvolt & Smaťanová, 2014, pp. 36-50).

Local communities can play a key role in providing the inducement for a heritage project, as was the case for the conservation process of twelve churches in the town of Vimercate and the village of Burago di Molgora near Milan in Italy, as described by Moioli (2015). The project was initiated bottom-up by the request of the community to the local priest of the Parish Council (which includes six parishes of the area) and to the Municipality of Vimercate for an urgent restoration of one of the twelve churches. In this small town and village, the concept of community is still very much alive and for many people the parish still serves as an important point of reference. The operational plan for the restoration of the churches was not characterised by a systematic approach, but was different for each of the twelve buildings and all depended on the commitment of volunteers from the communities. The conservation strategy of the churches was developed as a process where the different phases (knowledge, prevention, maintenance, restoration, enhancement, use and management) were strongly interconnected with each other and communication and training were key factors, with the assumption that the historic built environment was regarded by the surrounding communities as the origin of their own identity. The phases of the project reflected the very close involvement of volunteers and the local communities. For example, target groups were established and for every parish (with one person responsible and volunteers to take care of a given church). A series of four seminars on the conservation of heritage was organised and face-to-face interviews conducted to gather information on the churches and their specific problems. The seminars and training courses aimed not only at disseminating knowledge on the topic of conservation, but also strengthening the bond between the volunteers engaged in the project, thereby increasing the social capital of every individual involved. Although the project is at the moment still ongoing, the close commitment of the community is already vis-

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ible in the number and nature of activities they have organised. Furthermore, the community developed communication platforms regarding the project and formed a working team which collaborates to promote the events and actions undertaken within the framework of the project, for example by means of social media such as Facebook (Moioli, 2015).

FOSTERING INTEGRATION

The research by Bradley et al. conducted in 2009 provides relevant data on the connection between the historic built environment, a sense of place and social capital. The study concludes that the relationship between cultural heritage and social capital is of an indirect nature and occurs through an enhanced sense of place which is triggered by the presence of historic buildings. The historic built environment provides a context in which interactions between people may occur and can lead to an increase in social capital. This can happen within the framework of cultural heritage in three ways: by providing a context within which knowledge about the past can be exchanged, by active engagement in heritage-related activities and by creating an environment in which non-heritage-related activities can also take place. This means that heritage does not only contribute to a reinforced sense of place, but also provides a social context in which people can interact and become acquainted with each other (Bradley, et al., 2009).

Social impact of the Heritage Lottery Fund projects throughout the UK was examined by Applejuice Consultants in 2006 and 2007. As was mentioned before, they combined quantitative and qualitative techniques to assess the benefits to individuals and communities participating in heritage projects: telephone surveys, focus groups, individual interviews and case study observations. The researchers report that “[i]t’s clear from the case study research that heritage projects can create stronger ties between people and the places they live” (Clark & Maeer, 2008, p. 38). The research on social impact suggests that some of the heritage projects examined have contributed to building links within and between communities. Intergenerational links between communities were enhanced by, for example, the “Forgotten City, Hull” project, during which several generations gained an insight on what it must have been like to live in Hull during the Second World War (Clark & Maeer, 2008, p. 40). The project manager stated: “Three generations were involved in the project. [...] The older people involved had generally not talked about their experiences during the wartime before” (Applejuice Consultants, 2008, p. 59).

Other HLF projects have proven to be successful in forging bridges between different migrant communities:

— From the individual case studies, “Our Brick Lane” (Eastside Community Heritage, London) brought together different migrant communities including the Bangladeshi, Somali and Jewish Communities. The “Divis and Black Mountain” project (The National Trust) in Belfast brought together many different groups from republican and nationalist ar-

... eas of the city, whilst the “Discover Brighton” project (Eventus Ltd, Yorkshire & Humber) established better links between new residents and people who had lived in the village for many years (Applejuice Consultants, 2008, p. 56).

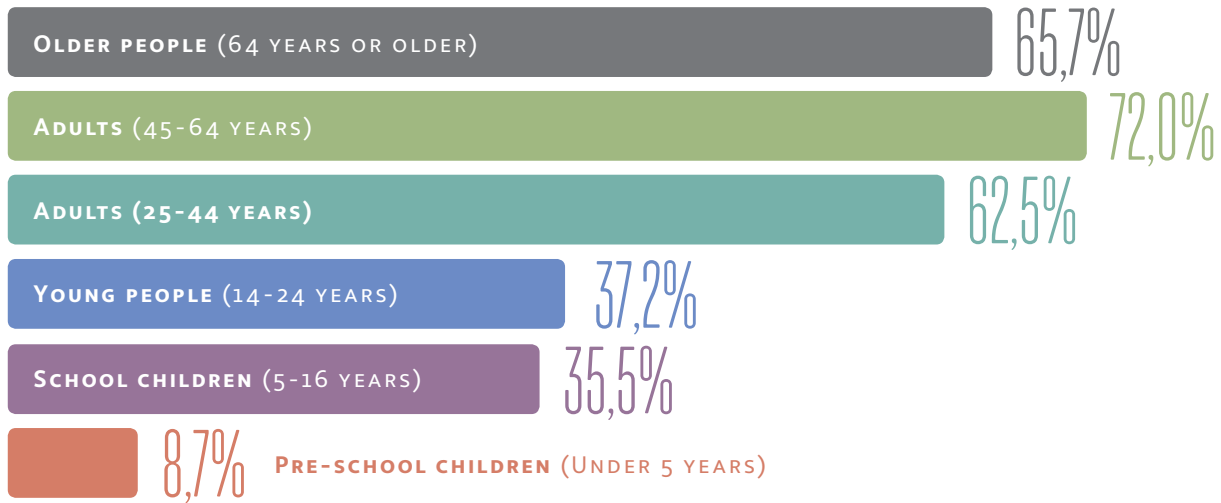
On the results of the telephone surveys conducted by Applejuice Consultants, the following is stated concerning social cohesion: “In the telephone surveys, over a half (58%) of project managers felt that strengthened bonds of trust within communities would be an outcome of their project. Nearly as many (52%) felt that improved intergenerational understanding was an expected outcome” (Clark & Maeer, 2008, p. 40).

Other projects have been reported to have broken down the barriers faced by asylum seekers (the “From Plantation to Pollok, from Kabul to Kennishead” project) and forge links with marginalised groups (the “Collections, Actions and Access” project) (Clark & Maeer, 2008, p. 40).

VOLUNTEERING ACTIVITIES

Another way in which heritage is thought to be beneficial for social capital is by heritage institutions promoting the voluntary interaction between people, which is believed to create a greater sense of community involvement. The voluntary aspect, which means that people who do not have to take part in the activity, nevertheless choose to, is assumed to play a role in the development of social inclusion. From 2008 to 2010, BOP Consulting was commissioned by the Heritage Lottery Fund to conduct national research on the social impact of volunteering in HLF-funded projects in the UK. Almost all HLF projects work with volunteers and many of them also play key roles in the management, design and leadership of these projects, which makes volunteering the cornerstone of HLF funding. The research done by BOP Consulting was based on a survey with 725 respondents, 27 site visits, non-participant observation of volunteer activity and interviews with more than 220 volunteers (BOP Consulting, 2011, p. 65). It should be noted that the results of the study show that the benefits on a social level reported by HLF volunteers cannot be directly connected to HLF or a heritage-based experience, but are more driven by the act of volunteering per se. Nevertheless, the evidence suggests that volunteering at HLF projects can benefit the development of social capital on three levels: by enhancing face to face interaction, intergenerational contacts, and a sense of belonging. 92% of the volunteers stated to have met new people through their volunteering work and almost 35% of them sustained these relationships by socialising with these new contacts outside the HLF context. Regarding intergenerational contacts, 72% of the volunteers claimed to have increased contact with older adults (45-64), 66% of the volunteers had increased contact with the elderly (65+) and 63% had increased contact with younger adults (25-44) (see Figure 3.12).

The more people feel a sense of belonging within a community, the faster is the change towards a cohesively acting community. 27% of the volunteers



📌 **FIGURE 3.12.** INTERGENERATIONAL CONTACT BETWEEN HLF VOLUNTEERS. THE BALANCE SHOWS THE PERCENTAGE OF VOLUNTEERS WHO HAVE ENHANCED THEIR CONTACT WITH DIFFERENT AGE GROUPS THROUGHOUT THEIR VOLUNTEERING ACTIVITIES

SOURCE: BOP Consulting, 2011, p. 65.

felt they belonged to their neighbourhood very strongly and 47% felt this was fairly strongly so. However, regarding community cohesion, 73% of them reported not to feel as if their volunteering experience had had any effect on their view of the community cohesion in their local area although in one case the following was stated: “The best thing has been to be part of a genuinely cohesive project. There are frustrations in a city like Bradford but a project like this brings together different people with a common vision” (BOP Consulting, 2011, pp. 80-89).

The research by Applejuice Consultants (2008) concludes that participation in heritage-related activities can stimulate the formation and reinforcement of local communities. In this way, heritage locations can play a social role in enhancing the mutual connections between people and between them and their living environment. Heritage can furthermore arouse an increased understanding among outsiders for other communities and their environment.

Another research on the impact of the projects funded by the Heritage Lottery Fund in the UK was conducted in 2013 by Maeer and Killick. This study concludes that participating in heritage-related activities can stimulate the increase of knowledge and understanding of others. Moreover, they argue that participation in heritage can be a guide in acquiring a new perception on certain aspects and in increasing the curiosity within a community. As part of the Refugee Communities History Project a survey to assess its impacts on community was conducted. The project ran from 2004 to 2007 and implied the involvement of refugee community organisations in recording oral history interviews and staging local exhibitions. The results of the survey indicated that 85% of the visitors of the local exhibitions claimed to have obtained

a greater understanding of refugee communities through this experience and 85% acknowledged that it had helped them to see the positive contributions made by refugees.

Another project from the UK with considerable impact on communities has been one regarding community archives: there are about 3,000 community archives in the UK and they are supported by about 30,000 volunteers. The results of 46 conducted questionnaires among these volunteers have suggested that community archives can stimulate understanding, tolerance and respect between generations and diverse communities, promote active citizenship, provide training opportunities and create interest in marginalised communities (Maer & Killick, 2013, pp. 12-14).

3.9 CULTURAL HERITAGE CONTRIBUTING TO EUROPE 2020 STRATEGY

Having in mind the goals of the Cultural Heritage Counts for Europe project, it is important to analyse how cultural heritage might contribute to achieving the priorities of the main strategic document of the European Union — *Europe 2020. A European Strategy for Smart, Sustainable and Inclusive Growth*. The three mutually reinforcing priorities of the strategy are defined as:

- smart growth: developing an economy based on knowledge and innovation;
- sustainable growth: promoting a more resource efficient, greener and more competitive economy;
- inclusive growth: fostering a high-employment economy delivering social and territorial cohesion (p. 5).

The role of culture in achieving the above-listed aims is clearly underestimated with no direct reference to either culture, arts or heritage in the document. However, all of these, including cultural heritage has the potential to contribute to smart, sustainable and inclusive growth (though the term “development” would be more appropriate here).

3.9.1 SMART GROWTH: DEVELOPING AN ECONOMY BASED ON KNOWLEDGE AND INNOVATION

The CHCfE project has not identified specific studies that dealt directly with cultural heritage contributing to the development of a knowledge- and innovation-based economy as such. However, an analysis that is meant by this goal in



the Europe 2020 strategy confirms that although this is an area where research is lacking to date there is in fact some research-based evidence of the potential of cultural heritage as one of the catalysts of such development. In order to “strengthen knowledge and innovation as drivers of our future growth” (European Commission, 2010, p. 11), the European Commission insists that special attention is focused on: research and development (R&D) sector, its funding and conditions for development, then the development of digital society, and last but not least education, training and life-long learning.

Starting with the last field, analysis presented in Section 3.8.3 of this report enumerates a number of examples where heritage plays a role in education in its broader sense, proving its apparent contribution to achieve the EU’s goals in this respect. Cultural heritage can contribute both to fighting poor reading competences of pupils and limiting the number of school dropouts (challenges listed by the Europe 2020 strategy with regard to education). It can be illustrated, for instance, with a study done by English Heritage (2007, pp. 44-45) where it is shown that interaction and contact with heritage might lead to improving cross-curricular skills of pupils (such as literacy, numeracy, observation, thinking, group work); or with an example of a regional museum in Sweden working to create positive learning experiences for young people resulting in one third of dropouts reengaging in formal education (Zipsane, 2007, p. 12).

Moreover, cultural heritage may, as evident from the results of the EPOCH project (EPOCH, 2004-2008), stimulate ICT innovation. It is due to the sector’s lagging behind when it comes to modern technologies that the demand for new solutions is so great. It is related both to the digitalisation of the resources and the need to present them to a wider public using virtual technology. Creating new products and services requires an increased number of high quality jobs — both in the supply and on the demand side.

Cultural heritage, especially post-industrial heritage, is frequently a basis for developing cultural creative quarters (e.g. Sheffield’s Creative Industries Quarter, Temple Bar in Dublin, etc.), including at the same time job creation in the area. Degraded districts with rundown buildings, often representing historic architecture, are visually appealing in terms of ambience and offer a unique *genius loci* attracting various social groups, cultural operators and start-up companies, more often than not from the creative sector, looking for favourable conditions for renting space. Regeneration of cultural heritage strengthens cultural value of the area, it plays a vital role in raising attractiveness of the place as well as contributes to its economic prosperity. Cultural heritage can also be a source of innovation itself, generating new ideas and solutions, as depicted in an example of an ablative laser technological system developed in a Florence creative cluster to clean and protect works of art (Lazzeretti, et al., April 2010).

3.9.2 SUSTAINABLE GROWTH: PROMOTING A MORE RESOURCE EFFICIENT, GREENER AND MORE COMPETITIVE ECONOMY

Detailing its aims, the Europe 2020 strategy emphasises elements of sustainable growth such as resource efficiency, a sustainable and competitive economy, green technologies, competitive advantages of manufacturing and SMEs. Again, analysis of evidence provided by the CHCfE project shows how cultural heritage can be used to achieve these aims.

For example the Europe 2020 strategy mentions especially combating climate change and clean and efficient energy. As Section 3.8.4 shows, a clear link between cultural heritage, a greener economy and the re-use of heritage resources can be demonstrated. It seems especially important as the existing housing stock (a vast part of which is considered as heritage) exceeds the number of the new build housing. Although it is a relatively new field of study, there is evidence showing that “transformation [meaning renovation of heritage and adapting it for present needs] is a much more environmentally efficient way to achieve the same result than are demolition and rebuilding” (Itard, et al., 2006, p. 128). Moreover, transformation minimises construction waste; it uses less materials and the operational energy needed to perform the works is less or equal to the case of demolition and rebuilding (Nypen, 2003, p. 13). Refurbishment of existing buildings is also shown to be an effective strategy for reducing carbon emissions considering their life-cycle perspective, when compared to a new low-energy house (Civitas, Bygganalyse AS, Siv.Ing Kjell gurigard AS, August 2011).

Section 3.8.7 of the report elaborates in detail on the contribution of cultural heritage to regional attractiveness and competitiveness due to its uniqueness and its economic potential as one of the EU’s most significant assets. Investors are drawn to places with historic monuments for the reasons of prestigious locations (Haspel, 2011) and availability of creative human resources attracted to heritage places (Marlet & Poort, 2005). Residents chose heritage areas because of their aesthetic values, the presence of historic buildings, and the beauty of the natural environment (Marlet & van Woerkens, December 2005). Cultural heritage is also a vital part of the tourism sector enhancing its appeal and strengthening its economic impact. In a less obvious way than only attracting visitors to sight-seeing, cultural heritage could be a basis for developing less common clusters — such as the Motor Valley Cluster (Alberti & Jessica, 2012), where thanks to the regional identity and heritage of the motor sport industry a new form of cluster has been created, combining motor industry companies, artisan and tourist organisations, both tangible and intangible heritage assets (museums, collections, archive, expertise and practices) as well sports facilities and other institutions.

3.9.3

INCLUSIVE GROWTH: FOSTERING
A HIGH-EMPLOYMENT ECONOMY DELIVERING
SOCIAL AND TERRITORIAL COHESION

According to Europe 2020 “[i]nclusive growth means empowering people through high levels of employment, investing in skills, fighting poverty and modernising labour markets, training and social protection systems so as to help people anticipate and manage change, and build a cohesive society (p. 17).”

Cultural heritage has been proven (for details see Section 3.8.6) to be a job generator, either direct (in the cultural heritage sector), indirect (in companies providing goods and services for cultural heritage) or induced ones (such as tourism or cultural industries), with the number of persons directly employed in cultural heritage sector in Europe amounting to 306,000 and indirectly created jobs to 7,8 million person-years (Nypan, 2009, pp. 15, 26). Moreover, it is a rather labour intensive sector requiring also purchasing specialized services (conservation works, construction, architectural design) as well as specific materials and goods. This contributes to maintaining jobs in the sectors providing the services and goods, as well as the education and training sector.

Cultural heritage is not only a sector that provides employment but it can be an important factor in building social capital by acting as a community hub “providing bonding and bridging opportunities between different age groups, long time and new residents, different ethnic and religious groups” (Murzyn-Kupisz & Działek, 2013, p. 47), both in the heritage sites or museums themselves and in cafes or shops located on the premises. Furthermore, volunteering programmes offered by heritage organisations can reward participants with such benefits as: inter-generational contacts, face-to-face interaction and a sense of belonging (Rosemberg, et al., September 2011), as well as positively influence mutual understanding between people of different backgrounds and one’s knowledge about the other (Maer & Killick, December 2013). These are experiences that can help “people experiencing poverty and social exclusion [...] live in dignity and take an active part in society” (European Commission, 2010).

Subjectively felt quality of life of an individual is influenced by many factors; feelings of belonging and a sense of identity are among the most important ones (for the discussion on the role of cultural heritage in identity creation, see Section 3.8.5). One’s psychological stability might also be impacted by familiarity with places and feeling of continuity that are, among other factors, provided especially by historic neighbourhoods (Ashworth, 1993, p. 37), which also seem to be better received by city dwellers than modern, ordered, simple spaces in new neighbourhoods, due to their human scale, varied and rich architecture and public space (Paszkowski, 2011). ©

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📍 **The Mosan medieval heritage centre located in the fabulous “Maison espagnole” (Spanish house) in the heart of the Meuse valley in Belgium.**

Winner of a 2009 EU Prize for Cultural Heritage/ Europa Nostra Award (Education, training and awareness-raising).

PHOTO © Europa Nostra





CONCLU -SIONS

4 CONCLUSIONS

The main purpose of the Cultural Heritage Counts for Europe project was to provide evidence-based research to verify the initial hypothesis that cultural heritage has a vital role to play in building contemporary Europe. A holistic theoretical framework was developed based on the four pillar principles embodied in the Hangzhou Declaration (UNESCO, 2013), in order to fully demonstrate the impact that cultural heritage produces on the economy, society, culture and the environment. The purpose of this section of the report is to draw together the key findings of this work into clear conclusions that can be shared with European decision makers at all levels of governance along with other stakeholders, including local communities, NGOs, and individuals, who together have a vital interest in realising the potential contribution of cultural heritage to Europe's future sustainable development.

The research set out in the report covers both an international literature review – the macro level and a mapping of European research studies – the meso level. In addition this final chapter will also make reference to Annex which sets out a number of case studies to provide “real-life” examples in support of the project's main conclusions (micro level).

4.1 MACRO LEVEL – CULTURAL HERITAGE IMPACT: THEORY AND DISCOURSE ANALYSIS

The theoretical overview of international literature and discourse analysis revealed that immovable heritage as a “capital of irreplaceable cultural, social and economic value” (Council of Europe, 1975) is not a new idea. In line with the concept of integrated conservation, immovable heritage was already considered as a source for socio-economic development through urban regeneration during the late 1970s. However, at that time the basis of the concept was still solely based on a conservation-oriented approach, focussing on the physical conservation and cultural value of immovable heritage. From the 1990s onwards, however, the definition of what heritage is and what it entails has expanded. The heritage discourse has consequently evolved since that time from an object or conservation-oriented approach towards a more subject or value-oriented approach, thereby placing new emphasis on the intangible features that enable a more holistic understanding of immovable heritage to be developed. As a result, a new shift towards an all-inclusive historic urban environment can be seen where immovable heritage objects and experiences of intangible cultural heritage are not separate entities.

At the same time the research shows that during the 1990s the word “sustainable” also started to appear more often in policy documents on cultural heritage with more than half of the cases combining “sustainable” with “development.” These conclusions, however, do not elaborate further on how sustainable development became ingrained in international policies and how it is reflected in the cultural heritage field. Several interesting studies and analyses have already been made on that paradigm shift and were reflected upon in the macro level part of the report.

In May 2013, this evolution culminated in the Hangzhou Declaration *Placing Culture at the Heart of Sustainable Development Policies*. The declaration was prepared in view of the reformulation of the millennium goals in 2015, taking on board the concern that the previous version of the millennium goals did not mention culture. This declaration adopted by UNESCO is widely recognised as a “break-through” point in acknowledging culture as a system of values and resources and a framework to promote social and economic development as well as environmental sustainability. Moreover, the document states that culture can be the key driver for sustainable development and should, therefore, be fully integrated as the fourth fundamental principle, in equal measure with economic, social and environmental factors.

More recently, in May 2014, the Council of the European Union adopted *Conclusions on Cultural Heritage as a Strategic Resource for a Sustainable Europe*. This document adopts a holistic policy approach to cultural heritage, recognising it as a resource for enhancing the social capital in Europe. Further, the *Conclusions* endorse the economic impact of cultural heritage and its possible role in achieving the Europe 2020 strategy goals for smart, sustainable and inclusive growth. Following the EU Council, the European Commission adopted in July 2014 the *Communication on an Integrated Approach to Cultural Heritage in Europe* (COM(2014) 477). This policy document has a similar vision and understands cultural heritage as an asset in economic growth and social cohesion. It supports member states to utilise the different resources for cultural heritage available under EU instruments and calls for stronger cooperation at the EU level.

4.2 MESO LEVEL – CULTURAL HERITAGE IN THE EUROPEAN UNION: ECONOMIC, SOCIAL, CULTURAL AND ENVIRONMENTAL IMPACT

4.2.1 OBSERVATIONS CONCERNING THE IMPACT OF CULTURAL HERITAGE

This level of analysis involved the major part of the research conducted. The overall aim of the meso level was to deliver a mapping of available European research and studies on the impact of immovable heritage. From this mapping key findings and general trends were evaluated and compared to the policy/discourse shifts identified as part of the literature review at the macro level.

Based on the large amount of research conducted, responses received to the project, and contributions to the online survey, it can be stated that the impact of cultural heritage is of key interest to many stakeholders within Europe. In line with the policy/discourse shift, observed in the macro level, towards a more holistic understanding of cultural heritage impact, an increased awareness of the wider contribution of cultural heritage can be seen in Europe from the 1990s onwards. On the one hand, cultural heritage became less isolated as diverse (adjacent) sectors and fields took on an interest in the topic of e.g. social cohesion research, creative industries and entrepreneurship, housing stock management, etc. On the other hand, the interest in cultural heritage identified was no longer restricted to government agencies and research institutes but also gained attention from local government, civil society and even individuals. The last includes formally organised or spontaneously grown groups of stakeholders that enjoy the heritage or play an active role in its preservation (Chirikure, et al., 2010). These groups can be very diverse and their actions may range from interest in local history and folklore to active engagement, e.g. creating historic societies and heritage associations.

The 221 studies collected through the survey and circa 540 additional studies analysed in the meso level provide wide-ranging evidence of the economic, social, cultural and environmental impact of cultural heritage in the European Union. The following visualisation (Figure 4.1) presents how the different topics discussed in the subdomains relate to the economic, social, cultural and environmental impact of cultural heritage. These subdomains are thoroughly analysed and elaborated in the meso part of the report.



📌 **FIGURE 4.1.** HOLISTIC FOUR DOMAIN APPROACH

SOURCE: OWN.

This diagram specifically illustrates the analysis of evidence collected in the European Union. It allowed the filtering out of the most recurring cultural heritage impacts identified at the European level. These findings were grouped into nine European-oriented subdomains, as presented in Table 4.1.

📌 **TABLE 4.1. SUBDOMAINS OF IMPACT OF CULTURAL HERITAGE**

SUBDOMAIN	SOURCE OF EVIDENCE	POSITIVE IMPACTS	ADVERSE IMPACTS AND CHALLENGES
REGIONAL ATTRACTIVENESS AND COMPETITIVE ADVANTAGE	<ul style="list-style-type: none"> spatial correlation between municipalities, equilibrium sorting models analysis of spatial spillover effects willingness-to-pay for living close to historic city centres macro-economic analysis of clusters 	<ul style="list-style-type: none"> contribution to the neighbourhood's atmosphere, attracting inhabitants (citizens, households, creative class, employees, etc.) creates compelling city narratives for marketing purposes character of cultural heritage buildings attractive for investment (both prestige or affordable space) liveability of the city core and areas attractive to key company personnel 	<ul style="list-style-type: none"> gentrification tourism congestion exclusion of certain social groups <i>McGuggenheimisation</i> (Honigsbaum, 2001)
RETURN ON INVESTMENT, TAX INCOME AND GVA/GDP	<ul style="list-style-type: none"> analysis of public investments cost-benefit analysis multi-criteria analysis impact weighing factors 	<ul style="list-style-type: none"> generator of tax revenue for public authorities, both from the economic activities of heritage-related sectors and indirectly or induced activities spillovers from heritage-oriented projects leading to further investment track record on good return on investment 	<ul style="list-style-type: none"> weak sustainable development when solely economic capital is considered
LABOUR MARKET	<ul style="list-style-type: none"> quantitative data analysis statistical analysis of (in)direct employment rates related to the cultural heritage sector 	<ul style="list-style-type: none"> jobs created during implementation of heritage-oriented projects and in heritage maintenance significant indirect and induced creation of jobs — up to 26.7 induced jobs to each cultural heritage job highly labour intensive sector social-service spillovers creates demand for specialised workforce and opportunities for skills training 	<ul style="list-style-type: none"> not enough educated or trained workers a number of job posts only of season or part-time character
BUILT HERITAGE AND THE REAL ESTATE MARKET	<ul style="list-style-type: none"> quantitative data based on hedonic pricing and contingent valuation methods comparative research targeting listed buildings and non-listed properties correlation between property prices and historic landmark distance 	<ul style="list-style-type: none"> creates high demand to live in a historical neighbourhood presence of immovable heritage increases property prices private and public owners receive preservation subsidies or tax reductions 	<ul style="list-style-type: none"> heritage status of a building can bring along extra regulations and restrictions which can be difficult to deal with restrictions for owners regarding free use and disposal of heritage buildings local increase in property prices

<p>②</p> <p>SOCIAL COHESION AND COMMUNITY PARTICIPATION</p>	<p>qualitative research to capture subjective information</p> <hr/> <p>surveys</p> <hr/> <p>narrative arguments and interviews</p>	<p>social inclusion, confidence and well-being</p> <hr/> <p>sense of ownership, civic pride</p> <hr/> <p>enables community engagement</p> <hr/> <p>creates new networks between communities</p> <hr/> <p>creation of inclusive environments</p>	<p>gentrification</p> <hr/> <p>disintegration of local communities</p> <hr/> <p>social exclusion</p>
<p>EDUCATION, SKILLS AND KNOWLEDGE</p>	<p>correlation analysis between heritage-oriented projects and specific age group learning</p> <hr/> <p>qualitative data based on interviews and questionnaires</p> <hr/> <p>expert analysis</p> <hr/> <p>rapid ethnographic assessment</p> <hr/> <p>participatory mapping</p>	<p>gaining knowledge, (arts and craft) skills, and awareness</p> <hr/> <p>contribution to body of knowledge on science and humanities</p> <hr/> <p>providing basis for cooperation and catalyst for creativity</p> <hr/> <p>change of attitudes and behaviour in terms of personal development</p>	<p>negative experience with a heritage site resulting in discouragement of further learning</p>
<p>AESTHETICS OF A PLACE AND IMAGE CREATION</p>	<p>qualitative data based on interviews and questionnaires</p> <hr/> <p>expert analysis</p> <hr/> <p>rapid ethnographic assessment</p> <hr/> <p>participatory mapping</p>	<p>attractive appearance of the cities</p> <hr/> <p>attractiveness of buildings</p> <hr/> <p>positive impact on people's sense of identity</p> <hr/> <p>provided basis for promotional strategies of cities, regions and countries</p>	<p>disintegration of local communities</p> <hr/> <p>tourism congestion</p> <hr/> <p><i>disneyfication</i> (Bourdin & Mullon, 2013)</p> <hr/> <p>"Not in My Backyard" attitudes</p>
<p>IDENTITY CREATION</p>	<p>qualitative data based on interviews and questionnaires</p> <hr/> <p>expert analysis</p> <hr/> <p>rapid ethnographic assessment</p> <hr/> <p>participatory mapping</p>	<p>creation of immaterial value: <i>genius loci</i> or atmosphere and ambience</p> <hr/> <p>symbolic value</p> <hr/> <p>attractiveness</p>	<p>social exclusion</p> <hr/> <p>nationalistic exploitation</p>
<p>ENVIRONMENTAL SUSTAINABILITY</p>	<p>Life Cycle Analysis (LCA)</p> <hr/> <p>Life Cycle Costing (LCC)</p> <hr/> <p>statistical analyses of housing stock shrinkage</p> <hr/> <p>comparative analysis between current state of the residential building stock and renovation data (based on characteristics, physical quality and building stock developments)</p> <hr/> <p>dwelling replacement or life cycle extension decision-making process analysis</p>	<p>preserving embodied energy, reducing churn (demolition and rebuilding) in the built environment</p> <hr/> <p>reducing urban sprawl</p> <hr/> <p>prolonging the physical service life of buildings and building parts</p> <hr/> <p>supporting waste-avoidance</p> <hr/> <p>sustainable management of building stock</p>	<p>high energy consumption if not properly retrofitted</p>

4.2.2 OBSERVATIONS CONCERNING THE RESEARCH CONDUCTED AT EUROPEAN LEVEL

RESEARCH OBSERVATIONS

One of the first observations from the analysis of the research conducted at the European level is that many studies tend to take as self-evident that heritage produces benefits. They, perhaps understandably, use this assumption as a starting point instead of inquiring firstly whether heritage actually has an impact and then if this impact is beneficial or detrimental. In many cases statements are asserted too often as definitive facts without justification and evidence-based research. It seems especially true in the case of the impact on culture where a significant part of studies, reports and summaries are based on very general research results, which do not allow for drawing clear conclusions. Another observation is that much of the research does not differentiate between heritage and the generic field of culture as a whole. Culture, in its broad sense, has been the subject of a relatively large number of studies regarding its influence. The difficulty of extracting information that concerns only heritage necessarily hinders drawing conclusions from these research results and preparing the case for cultural heritage alone. A further difficulty is that heritage itself covers a wide field of interest and in many cases there is the additional problem of treating material and immaterial, movable and immovable heritage as one issue. Several studies on culture have nevertheless been included in the report because their subject matter allows for an assumption that cultural heritage constituted an important part of the research.

SCOPE OF THE RESEARCH

The numbers of collected studies on the impact of immovable heritage have been increasing equally steadily for each of the four impact domains over the past decade. The number of collected studies that address the social and cultural impact of immovable heritage increased during the late 1990s. The most noteworthy numerical difference found between domains was the high number of studies covering economic impact compared to the relatively low number addressing environmental impact.

Also in contrast to the other impact domains, respondents submitted some very early examples of studies that address the economic impact of immovable heritage, which might lead to the conclusion that this impact area was of interest earlier than any other. On the other hand, the more recent field of research

and interest is the link between cultural heritage and environment. It can be observed that studies dealing with the environmental impact of immovable heritage only appear in the survey responses from the 2000s onwards.

The analysis of the survey results shows that the holistic approach to cultural heritage is still more a goal to work towards than the norm. Only 6% of the collected studies focus on all four domains with the available data confirming that currently the three main respondent groups (public governments/agencies, cultural organisations and research institutions) are not yet addressing research on the impact of heritage in terms of an integrated approach.

A critical analysis of the collected data allowed for making cautious statements as to which impact domains (economic, social, cultural or environmental) are underrepresented or lack scientific evidence-based analysis. The holistic four domain approach model presented in Figure 4.1 shows a number of areas recognised as potential areas of impact based on the world literature review. However, it has to be noted that there are some areas that are commonly recognised but where few or no qualitative studies were identified. One of these areas is the impact of cultural heritage on creativity and the creative sector. There seems to be a general feeling that cultural heritage must play a role in developing and inspiring production of new goods and services (e.g. souvenirs, crafts) or is used by the film and music video industries as settings for their productions. However, most authors mentioning the issue limit themselves to general statements (McLoughlin, et al., 2006, p. 54; Nypan, 2005) with no detailed quantitative nor qualitative analysis.

Moreover, the impact of cultural heritage on the development of cultural resources and historical value has tended to be only signalled in literature on the topic. While it is clear that investment in cultural heritage should enrich culture, it seems that researchers consider this a certainty that needs no confirmation through research. The impact on other subdomains categorised in this report as the cultural domain such as identity, symbolic value, attractiveness and image as well as education, has been covered in the literature much more extensively.

GEOGRAPHICAL OBSERVATIONS

One of the main challenges in collecting studies across Europe was the problem of language diversity (one reason, for example, for inviting experts from Central European countries to participate in the project). This is also one of the reasons why broadening the research to embrace socio-economic as well as cultural and environmental research proved particularly challenging. Whilst reviewing all literature in all national and regional languages was a task beyond the potential of the CHCfE project, the number of studies accessible, along with interviews with experts, nevertheless allowed sufficient analysis of relevant material to enable conclusions to be drawn across all four domains.

There is a clear gap between the interest and the number of studies conducted in Western and Central Europe, with the former being much more advanced in the process. The research on the impact of heritage in Central Europe is a relatively new phenomenon, despite the fact that ten years have passed since the largest number of countries from the region joined the EU (2004: Czech Republic, Estonia, Lithuania, Latvia, Poland, Slovakia, Slovenia, Hungary), seven years since two other members joined (2007: Bulgaria and Romania) and one year since the last one joined (2013: Croatia). Due to the historic reasons discussed earlier (including 50 years of dividing Europe by the Iron Curtain and the recent political and economic transformation in Central Europe), the so-called new member states of the EU are lagging behind with research on the potential of heritage as a catalyst for socio-economic development. There seems to be, however, a great need for research in this field, which was expressed by the experts, who noted also the demand for and lack of available holistic methodologies to perform the task. Western Europe has a longer tradition in valuing and using the potential of cultural heritage. The scale and scope of the research is, however, not evenly distributed over all member states.

4.3 MICRO LEVEL – CULTURAL HERITAGE IMPACT ASSESSMENT CASE STUDIES AND ANALYSIS OF THE EU PRIZE FOR CULTURAL HERITAGE/ EUROPA NOSTRA AWARDS LAUREATES

In order to illustrate the diagnoses introduced in previous chapters, three case studies were selected where heritage succeeded to have an impact on the economic, social, cultural and environmental domains. The case studies presented come from both areas of research: Western (cultural heritage in Mechelen, Belgium) and Central Europe (museums in historical buildings in Poland – the Gallery of Polish 19th-Century Art, a branch of the National Museum in Krakow and Muzeum Sztuki in Łódź – ms²). Case studies were supplemented with evaluations of heritage impact. These were conducted by the winners of the EU Prize for Cultural Heritage/Europa Nostra Awards. A detailed presentation and discussion of all these cases is located in the Annex.

The aim of including the case studies, apart from providing examples based on hard data at the local level, was also to develop a methodological framework which allows for the assessment of impact of heritage on society. As the evaluation of the influence of cultural heritage on different levels of society is not an obvious task, case studies were chosen as best practice examples of how to deal with impact assessment. The methodological framework developed for the case

studies can serve as a starting point for future studies aimed at approaching the subject of the impact of cultural heritage on the economic, social, cultural and environmental levels.

The objective of the analysis of the impact conducted by the EU Prize for Cultural Heritage/Europa Nostra Award winners was to obtain insight into how they evaluate potential impacts of the nominated project. The study, furthermore, examined how these impacts had been monitored and provided precise examples of the applied methodologies and predictions as to how the impact assessments may influence the future course of the projects. The study shows, however, that only one third of the EU Prize laureates have assessed the impact of their cultural heritage projects, despite their wide recognition and exemplary role in the sector.

4.4 OUTCOME OF THE RESEARCH

The analysis of various studies and documents clearly proves that heritage has positive impacts on all four domains — economy, society, culture and environment. This impact is visible regardless of the type of heritage object (e.g. individual monument in the countryside or a complex of historic buildings in the city centre) or geographical location (Western and Central Europe, central and provincial location). Although the mapping of the studies is neither complete nor representative for all EU member states, it can be stated without a doubt that there are numerous gaps in the research. Hence, the major conclusion is the necessity to conduct research measuring the impact of heritage, ideally in all four domains, following the holistic approach recommended. Such research should clearly demonstrate to various actors (owners, managers, authorities, sponsors, etc.) whether an investment has been successful in achieving the stated goals. One of the main observations on the current position is that the impact of cultural heritage is too often taken for granted and often even basic data related to the investment is not collected.

4.4.1 RAISING AWARENESS OF THE IMPACT OF CULTURAL HERITAGE

The mapping conducted throughout the meso level was never conceived as only a means to gather and analyse data, crucial though that was. In the case of the CHCfE project, the actual process of collecting existing studies was equally important. By asking for this specific type of data from the different target groups on European, national, regional, local and/or sectoral levels, a sense of awareness of the impact of immovable heritage has been shaped. In this context, it

is important to mention the valuable cooperation with the consortium partners and the project leader, Europa Nostra, as well as the wider European Heritage Alliance 3.3 that triggered the commissioning of the project and ensured the dissemination of the online survey. Considering the results of the project and the importance of improving systematic data collection on the impact of heritage, the questionnaire used via the online tool proved to be an efficient method of data collection and it could be transferred to different web pages for future continuation. The project partners are looking for ways to keep the survey alive to continue gathering data on the impact of cultural heritage but also to contribute to the ongoing debate on the dynamic nature of the tool in today's social media.

GUIDE FOR REGIONAL AND LOCAL AUTHORITIES ON HOLISTIC APPROACH TOWARDS 4.4.2 CULTURAL HERITAGE IMPACT ASSESSMENT

The report provides an insight into a new sustainable development discourse, which can be a useful introduction for local government, regions and cities that are confronted with changing priorities and challenges. The results can serve both as an incentive for a better understanding of the role of cultural heritage in our current and future society and an overview of the most commonly used cultural heritage impact assessment methodologies within the European Union. Thereby, both references to best practice and to policy documents are included in the report. Moreover, a complete hands-on guide to developing and implementing a heritage impact assessment can be found in the micro level case studies. It seems especially vital to raise awareness of the importance of these issues in times of financial crisis when public expenditure on culture and cultural heritage tends to be short-sightedly reduced or cut altogether.

The need for this specific information and for new methodologies was raised at meetings and lectures held on March 14, 2014 with international experts in the field of immovable heritage, organised by DOCOMOMO Belgium, in collaboration with ae-lab (University of Brussels) and the Raymond Lemaire International Centre for Conservation (University of Leuven). Experienced public servants of built heritage administrations of the major Flemish cities (Antwerp, Leuven, Bruges, Gent and Mechelen) were invited to discuss major issues in heritage conservation at the municipal level, i.e. communication, public participation, political support and policies, and the heritage economy. There was great appreciation among the experts for the opportunity to discuss cultural heritage impact and the case studies concerning municipal heritage policies and practices in Flanders. The public servants explicitly asked to continue similar initiatives in the future,

as it was a unique opportunity for an open discussion among colleagues and developing insights into increasingly important sustainable development issues in the heritage conservation field.

Similar feelings and demands were expressed by the experts gathered at the International Cultural Centre in Krakow for the Central European Round Table on Cultural Heritage (October 17, 2014). Thirty specialists from various disciplines, representing almost all countries of Central Europe came to Krakow to present the challenges concerning cultural heritage that they are faced with in their countries. In general, so far, very few studies (even fewer with a holistic approach) were conducted in the region. A lack of a coherent methodology and the problem of creating interdisciplinary groups of experts to deal with the holistic approach were often raised as an issue. All of the participants agreed that there was a growing need and demand for such methodologies and research. The accession to the EU opened new possibilities for the heritage sector (also in terms of financial resources), however, benefiting from them is constrained by the lack of reliable data demonstrating the impact of cultural heritage. It seems that the first step has been taken: the shift in the approach towards cultural heritage has been done (heritage is no longer only an object of the past, it is also a resource for the future). Now it is time for the next step: finding appropriate ways of using cultural heritage for socio-economic development, without endangering its precious tissue. That can only be done based on reliable research.

4.4.3 CULTURAL HERITAGE AS A CONTRIBUTION TO EUROPE 2020 STRATEGY

Having the above in mind, it is important to analyse how cultural heritage might contribute to achieving goals of the main strategic document of the European Union — *Europe 2020. A European Strategy for Smart, Sustainable and Inclusive Growth*. The three mutually reinforcing priorities of the strategy are:

- smart growth: developing an economy based on knowledge and innovation;
- sustainable growth: promoting a more resource efficient, greener and more competitive economy;
- inclusive growth: fostering a high-employment economy delivering social and territorial cohesion.

The role of culture in achieving the above-listed aims is clearly underestimated, since there is no direct reference to either culture, arts or heritage in this document. However, all of these domains, including cultural heritage, might have their contribution to smart, sustainable and inclusive growth (though the term “development” would be more adequate here).

📌 **TABLE 4.2.** HOW CULTURAL HERITAGE CAN CONTRIBUTE TO EUROPE 2020 STRATEGY

EUROPE 2020 GOALS	CONTRIBUTION OF CULTURAL HERITAGE	EXAMPLES OF IMPACT	EVIDENCE-BASED EXAMPLES IN LITERATURE
SMART GROWTH	<p>Education, training, knowledge</p> <p>New technologies</p>	<p>Participation in heritage-related projects improves cross curricular skills. It can limit school dropout rates.</p> <p>There is a demand for new software (digitalisation, easier accessibility) in the field of cultural heritage. Cultural heritage is a source of ideas for new products and services.</p> <p>Use of virtual reality technologies to interpret historic areas and to support growth of cultural tourism.</p>	<p>English Heritage, 2007; Zipsane, 2007; Applejuice Consultants, 2008; Wavell, et al., 2009; Research Centre for Museums and Galleries, 2003</p> <p>Lazzeretti, 2003; Lazzeretti, et al., 2010; L. & Crevoisier, 2008; Salimbeni, et al., 2002</p> <p>EPOCH 2004-2008</p>
SUSTAINABLE GROWTH	<p>Regional attractiveness and competitiveness</p> <p>Greener economy, re-use of resources</p>	<p>Unique quality of location attracts foot-loose businesses, investors, residents and tourists.</p> <p>Cultural heritage attracts mutually supporting employment clusters essential to regional competitiveness.</p> <p>Preserving and adapting built heritage for contemporary purposes reduces urban sprawl, supports waste-avoidance and preserves embodied energy.</p>	<p>Haspel, 2011; Marlet & Poort, 2005; Marlet & van Woerkens, 2007; Alberti & Giusti, 2012</p> <p>Alberti & Giusti, 2012</p> <p>Itard, et al., 2006; Civitas, Bygganalyse AS, Siv.Ing Kjell gurigard AS, 2011; Hassler, 2009; van der Flier & Thomsen, 2006; Thomsen & Meijer, 2007</p>
INCLUSIVE GROWTH	<p>Creating jobs</p> <p>Social cohesion</p> <p>Quality of life</p>	<p>Maintenance of cultural heritage, its preservation and revitalisation have direct, indirect and induced effects on job generation. For example 26.7 indirect jobs created for every one direct cultural heritage job.</p> <p>Participation in heritage-related projects can result in a sense of ownership and an increased feeling of civic pride. It can lead to creating networks within communities, bring people closer together and increase social capital.</p> <p>Cultural heritage contributes to development of a favourable environment to live in (public space, familiar and stable spaces) as well as to the creation of a feeling of belonging and other social bonds.</p>	<p>Grefe, 2004, pp. 302-304; Jaskanis & Kościelecki, 2002; Della Torre, 2010; Salvador, et al., 2007; Réseau des Grands Sites de France, 2008, p. 14</p> <p>Nypan 2005</p> <p>Keaney, 2006, p. 23; Moioli, 2015; Bradley, et al., 2009; Clark & Maeer, 2008; Maeer & Killick, 2013</p> <p>Ziobrowski, 2010; Michelson, 2014; English Heritage, 2007; BOP Consulting, 2011</p>

SOURCE: OWN

Table 4.2, apart from indicating how cultural heritage might contribute to implementing the Europe 2020 strategy, shows that cultural heritage has a role to play in achieving goals of other sectorial and cross-cutting EU policies, including employment and social rights, rural development, competitiveness, environment, regional and local development, information society, civil society and NGOs, not to mention tourism, culture and education.

4.5 THE WAY FORWARD

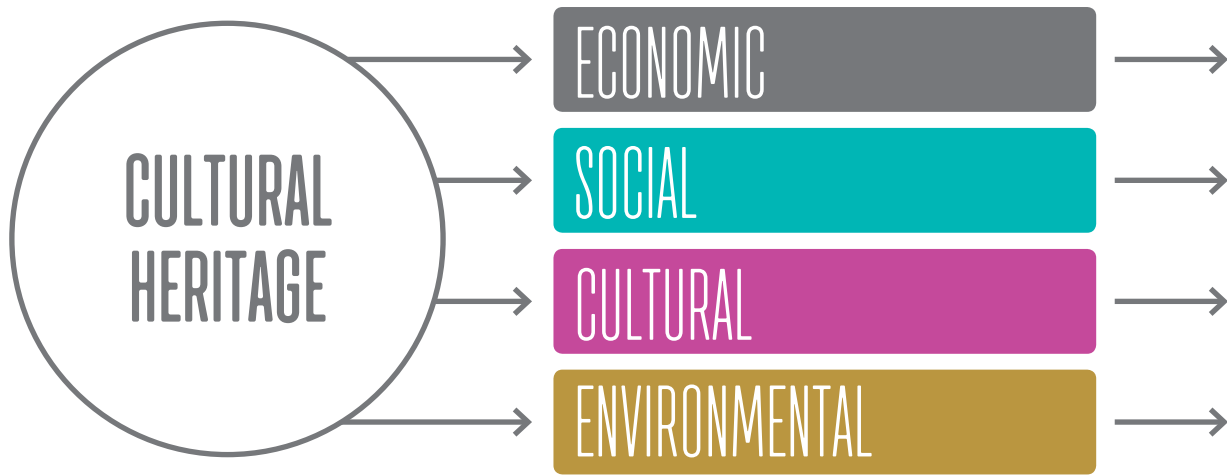
4.5.1 INNOVATIVE APPROACHES TOWARDS CULTURAL HERITAGE

The research conducted within the Cultural Heritage Counts for Europe project specifically dealt with defining and collecting data on the multiple impact fields of cultural heritage in the European Union. Throughout this extensive research, a new resource framework for cultural heritage management projects was identified: the “trading zone.” This term is used in anthropological sciences to describe specific interdisciplinary collaborations. Although several sectors have different objectives and viewpoints, they use forms of exchange by building an intermediate language, which allows them to communicate and create new cooperation (Galison, 1997). The work of Gustafsson (2004) introduced the “trading zone” concept to the cultural heritage field. The underlying assumption is that financial investment schemes allocated to cultural heritage management should not only be limited to those (narrowly) intended for spending and activities in the heritage field, e.g. public funding and restoration grants. These traditional schemes could be extended to resources from other sectors (e.g. social cohesion, labour market, regional development, creative industries, etc.).

Gustafsson and Rosvall (2008) draw this framework from the “Halland Model” experience in Sweden. Within the social economy sector, unemployed construction workers and apprentices were trained in traditional building techniques. During this training they gained proficiency on historic buildings at risk under the supervision of skilled craftsmen and conservation officers. In line with the concept of the “trading zone,” this held benefits for different sectors. In the process, historic buildings at risk were saved from demolition, a younger generation was trained in craftsmanship and new jobs were created.

Similar regional cross-sectorial cooperation has significant potential in creating a lively scientific and political marketplace where various traditions, methods and languages related to the actual stakeholders involved have to be understood and combined.

CHCfE project demonstrates that direct investments in cultural heritage not only contribute to the enhancement of culture, but can also be positively used as the interface between different policy areas and generate benefit in the economic, social, and environmental domain. This “downstream” view on cultural heritage investments validates the (limited) past and current assessment of cultural heritage impact.



📌 **FIGURE 4.2.** “DOWNSTREAM” PERSPECTIVE ON CULTURAL HERITAGE IMPACT

SOURCE: OWN.

However, this “downstream” approach does not use the full potential of cultural heritage. Only by applying a truly integrated approach towards cultural heritage can its impact be maximised. In its conclusions, CHCFE project identified several innovative European projects that take this “integrated mindset” as a starting point.

The innovation is based on a more “upstream” perspective on cultural heritage impact, whereby traditional investment schemes are enhanced with resources from other domains (Figure 4.3). This implies introducing non-heritage fund-



📌 **FIGURE 4.3.** “UPSTREAM” PERSPECTIVE ON CULTURAL HERITAGE IMPACT

SOURCE: OWN.

ing in cultural heritage to achieve non-heritage goals, such as social cohesion or reducing unemployment. Through cross-sectoral collaboration and a multi-layered framework benefits can be generated to ensure a sustainable future for cultural heritage .

Currently, several innovative examples that draw on this innovative framework have been identified in Europe:

- The “Distretti Culturali” [cultural districts] — a wide-area project co-financed by Cariplo Foundation, an Italian matching-grant programme. The project started in 2006 and is ongoing in the Lombardy Region in Italy. The aim of the “Distretti Culturali” is producing new attitudes toward culture as a factor for local development and moving beyond the common thought that the heritage sector should only deal with collecting money to pay for conservation costs. In practice, a cultural district is a model of integrated local development in which culture plays a strategic and cross-cutting role. Culture, research, education as well as the social and economic sectors are involved in its evolution and development (Barbetta, et al., 2013; Della Torre, 2015; Vandesande, et al., 2014).
- “Obnovme si svoj dom” [Let’s restore our home] — a Slovakian project aiming at the renovation of cultural heritage with the help of the unemployed, carried out with support from the European Social Fund under the Operational Programme Employment and Social Inclusion. The project was a collaboration between the Ministry of Culture and the Ministry of Labour, Social Affairs and Family of the Slovak Republic, all of which worked in cooperation with the Central Office of Labour, Social Affairs and Family of the Slovak Republic, Local Offices of Labour, Social Affairs, Family and Employers, respectively. It was also open to civil society organisations, foundations and municipalities in the Bratislava Region (Ižvolt & Smatanová, 2014).
- Traditional Farm Buildings Grant Scheme — the project sets out to protect the “ordinary” buildings used in agriculture and is managed by the Heritage Council of Ireland in partnership with the Irish Department of Agriculture, Food and the Marine, as part of the Rural Environmental Protection Scheme (REPS). This scheme is co-funded by the Irish government and the EU under Ireland’s Rural Development Programme 2007-2013, as a part of the European Agricultural Fund for Rural Development (EAFRD). The innovative aspect of the project is the recognition of these “ordinary” farm buildings as being worthy of support in the environmental protection context. The grant schemes understand the conservation of these buildings as a contribution to the conservation of the character of the Irish rural landscape and to European and national wildlife legislation, particularly the protection of bats and birds.

Although some examples of the “trading zone” mechanism can be found, more research should be conducted on the topic concerning how to successfully gather financial support from different sources and how to successfully implement alternative funding schemes.

4.5.2 PRESERVATION OF HERITAGE AND SUSTAINABILITY

The global policy context stresses the importance of more sustainable approaches to our existing building stock and the role that built heritage can play in this process. Today, it is observed that large, often prestigious, restoration works receive most of the public funding allocated to heritage and attention from the heritage field. This approach is perceived to be unsustainable in different ways. The disproportionate investment of financial and societal resources in restoration works often implies deterioration of the larger part of the historic urban environment, which — in the current system — is not sufficiently maintained to preserve its value. Moreover, the quality of conservation works cannot be underestimated, but it is also an often overlooked topic when it comes to cultural heritage, both in terms of public procedures and skilled workers. More research should be conducted on how a qualitatively maintained historic urban environment can contribute to sustainable development.

4.5.3 NEED FOR MORE EVIDENCE-BASED RESEARCH AND POLICY

Mapping of the texts in the EU member states clearly demonstrates a great need for further, more in-depth, cross-sectorial and interdisciplinary research and analysis that would demonstrate the impact of cultural heritage on various spheres of life. Overall the amount of research is relatively low with limited scope, and often preventing far-reaching conclusions from being drawn. Whilst the identified and analysed evidence supports the initial statement, that cultural heritage counts for Europe, filling the research gaps is clearly necessary if the wider impacts and benefits of cultural heritage are to be fully understood. There is also a clear disparity in terms of research carried out between various countries with the greatest number of studies identified in the UK. There is therefore a need to raise the awareness of both authorities and scientific institutions and to convince that measuring the impact of cultural heritage would be beneficial for all parties. It should be communicated not only to the newest member states of the EU located in Central Europe, where the need for evidence-based thinking about heritage has begun to develop only recently after the political transition, but to all EU member states, as awareness itself does not always translate into undertaking the credible in-depth research needed. Lastly, it is also important that future research focusses on all four impact domains in order to assess and understand the full potential of heritage for sustainable development. ⊗



ANNEX

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ANNEX. MICRO LEVEL. IMPACT ASSESSMENT IN PRACTICE: CASE STUDIES AND ANALYSIS OF EXAMPLES

In order to illustrate and complement the key findings and conclusions from the macro and meso level research that was set out in the main body of the report, case studies have been selected to provide “real-life” examples of where heritage is perceived to have succeeded in having a positive impact in the economic, social, cultural and environmental domains.



IMPACT OF IMMOVABLE HERITAGE IN THE CITY OF MECHELEN, BELGIUM

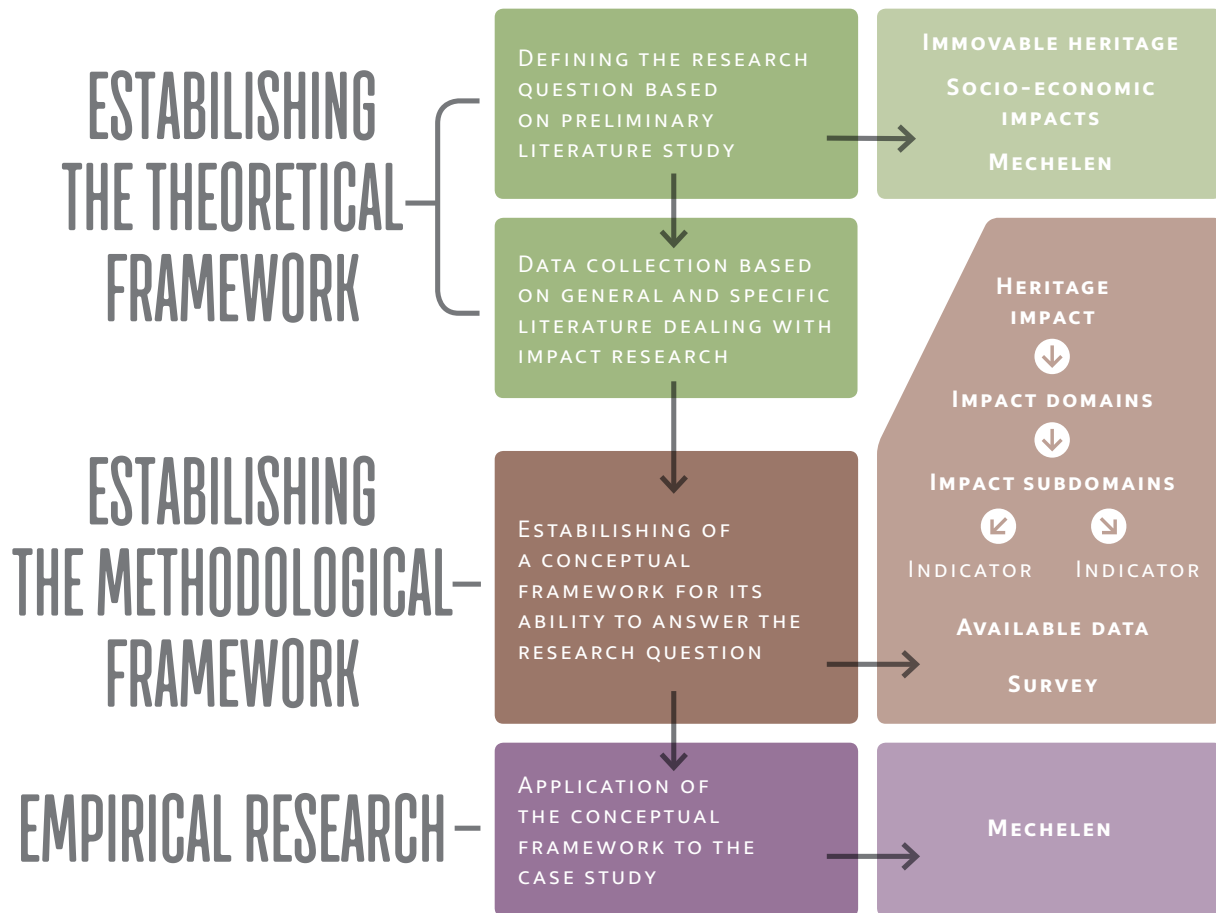


INTRODUCTION

The first case study concerns the city of Mechelen (Belgium) and is based on the work of two master theses (Thys, 2014; Schiltz, 2014) prepared by post-graduate students of the Raymond Lemaire International Centre for Conservation at the KU Leuven (research was conducted between September 2013 and June 2014). This report provides an abbreviated version of the data analysis and results obtained within the aforementioned projects, adapted for the purposes of the CHCfE project.

The main research question of this study was how to assess direct and indirect impact of immovable heritage on the economy, society, culture and environment in the case of the chosen object of study, i.e. the historic city centre of Mechelen.

As Figure *1. shows, the methodology of the research was divided into three stages: (1) establishing the theoretical framework of the study based on the analysis of policy documents, articles, and academic literature; (2) setting the methodological framework based on international literature and research of case studies and project analyses; and (3) the practical and empirical part of this project, the case study itself. The overall objective of the study was to present tangible material regarding the effects of heritage in Mechelen, in order to sug-



🔗 **FIGURE *1.** GENERAL RESEARCH METHODOLOGY

SOURCE: OWN.

gest future research paths and to provide the city with policy recommendations in this regard. As the aim was not to estimate the quantified value of heritage, but rather its spillovers in field of economy, society, culture and environment, the chosen approach was qualitative, rather than quantitative and the selected method was an indicator-based examination.

*1.2

SETTING: THE CITY OF MECHELEN

Mechelen is a Flemish city in Belgium, situated in the south of the province of Antwerp. From the place where Charles the Bold set up the highest tribunal of the Low Countries and the city in which Margaret of Austria installed her court, Mechelen grew out to become the religious centre of the Low Countries and the origin of the European train network. Its favourable geographic location on the shores of the navigable Dijle made it possible for the city to evolve into

a flourishing port and the centre of the cloth trade. Today, Mechelen is one of the five *kunststeden* (art cities) of Flanders together with Antwerp, Bruges, Ghent and Leuven. The city cherishes its outstanding heritage and has managed to maintain many vestiges from its rich history. At the same time, however, the city wants to be modern and keep up with modern times.

Mechelen stands out from other similar-sized Flemish cities due to its extensive cultural heritage and well-conserved medieval urban pattern. 1,292 buildings registered in the Inventory of Immovable Heritage, of which 404 were listed as protected monuments as of 2013, are testimonies to more than ten centuries of the city's development (Inventaris Onroerend Erfgoed, 2014). The heritage of the city forms a diverse, but coherent unity and provides it with an authentic urban fabric. Thanks to the steady change in inhabitants' attitude towards heritage, since 1980 more than 100 privately-owned heritage buildings have been restored. The excellent conservation of the historic urban environment would not have been possible without the joint effort of Mechelen's two key players: the city's cultural policy and the Monumentenzorg (the city's Monuments Care Service). With its 404 protected monuments, out of the 1,292 inscribed ones, about 30 percent of Mechelen's inventoried heritage is protected. This is a higher rate than the average in Flanders as a whole (Inventaris Onroerend Erfgoed, 2014).

*1.3

METHODOLOGY

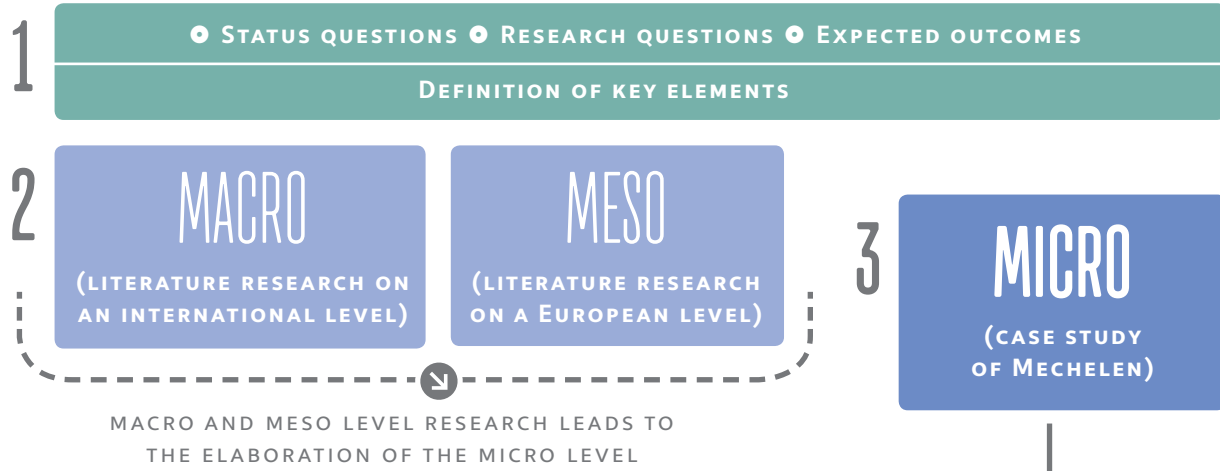
Due to a lack of similar studies, in respect to the research timeframe and the very scale of the study, both in Flanders and even on an international level, there was a need to develop a new methodological framework, as presented by Figure *2.

Possible positive and adverse impacts of cultural heritage and cultural heritage projects have been discussed in the macro and meso levels of the report. Thus, so as to not repeat the line of argument already presented, it is only important to emphasise that the case study of Mechelen implements the four pillar approach, while considering the impacts divided into four overlapping domains (economy, society, culture and environment).

The first step of the research was to identify the topics to be discussed concerning immovable heritage in Mechelen by means of interviews with local stakeholders and experts. Within the framework of this study, it was decided to conduct interviews with the Service Monumentenzorg, the Erfgoedcel (Cultural Heritage Administration), the Church Fabric and contractors involved in heritage on different scales (Figure *3).

The interviews provided a strong base of knowledge about the people, the heritage, and the policy of the city. They were especially helpful in the development of a list of indicators, thanks to the topics and interesting quotes they contributed.

SOCIO-ECONOMIC IMPACT OF HERITAGE: RESEARCH STRUCTURE



HOW TO DEAL WITH MEASURING THE IMPACT OF HERITAGE ON SOCIETY AND ECONOMY IN MECHELEN?

1. IDENTIFICATION OF POSSIBLE IMPACTS IN MECHELEN

DESCRIPTION OF THE POSSIBLE IMPACTS THAT COULD OCCUR IN MECHELEN IN OUR OPINION, BASED ON LITERATURE RESEARCH.

2. COLLECTION OF SAMPLE STAKEHOLDERS AND INTERVIEWS WITH THESE SAMPLE STAKEHOLDERS

THROUGH THESE INTERVIEWS WE GET A BETTER VIEW ON THE CONTEXT OF HERITAGE IN MECHELEN.

3. DEFINING THE INDICATORS OF THE SOCIO-ECONOMIC IMPACTS ON THE BASIS OF LITERATURE RESEARCH AND THE STAKEHOLDER INTERVIEWS

STARTING FROM THE OVERVIEW OF SOCIO-ECONOMIC IMPACTS THAT PROBABLY/POSSIBLY OCCUR IN MECHELEN, TOOLS NEED TO BE DESIGNED IN ORDER TO CAPTURE THESE IMPACTS.

4. ELABORATION ON THE INDICATORS: SHIFT BETWEEN ACHIEVABLE AND NON-ACHIEVABLE INDICATORS IN MECHELEN

RESTRICTIONS OF OUR RESEARCH: SOME IMPACTS WILL BE VERY HARD TO MEASURE AND SOME INFORMATION CANNOT BE COLLECTED WITHIN OUR RESTRICTED TIME.

5. DEFINING WAYS OF DATA GATHERING: QUESTIONNAIRES AND AVAILABLE DATA STATISTICS

BASED ON WHAT THE INDICATOR ASKS FOR, SPECIFIC INFORMATION NEEDS TO BE COLLECTED

6. DATA GATHERING

7. ANALYSIS OF THE DATA AND COMPARISON WITH OTHER SOCIO-ECONOMIC IMPACT RESEARCH

8. CONCLUSIONS AND EVALUATION OF THE PROCESS

Ⓜ OUTLINES OF OUR RESEARCH: BASED ON PREVIOUS RESEARCHES ABOUT SOCIO-ECONOMIC IMPACT OF HERITAGE

📌 **FIGURE #2.** METHODOLOGICAL STEPS APPLIED FOR THE STUDY

SOURCE: OWN.

📌 **FIGURE *3.** SUMMARY OF THE INTERVIEW WITH THE EXPERTS

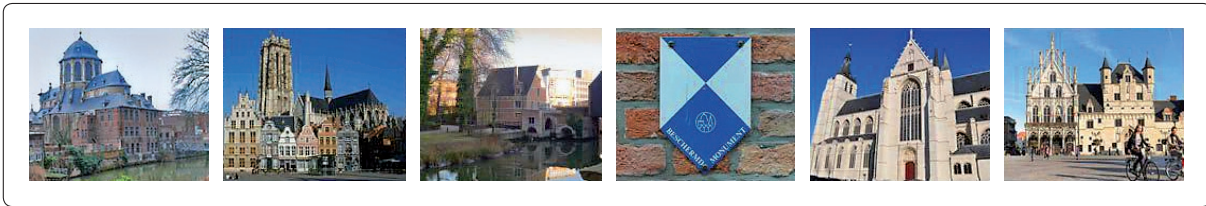
STAKEHOLDER/INSTITUTION	CORRESPONDENT	TOPICS
SERVICE MONUMENTENZORG (HERITAGE ADMINISTRATION)	Michèle Eeman Sofie Stevens	Change in mentality towards heritage Heritage heavily stimulated by city policy
ERFGOEDCEL (HERITAGE ADMINISTRATION)	Anouk Stulens Sigrid Bosmans	Importance of involvement of inhabitants in heritage Heritage as a raw material (as a source for other industries)
TOURISM MECHELEN (TOURISM MANAGEMENT)	Tina Vanhoye	Carrying capacity tourists-inhabitants City policy focuses on heritage Immovable heritage: primary attraction pole tourism
CHURCH FABRIC (SITE MANAGERS)	Guido Vandeneede	Cultural activities and community involvement in the church of the Beguinage His feeling as an inhabitant about the heritage
CONTRACTORS INVOLVED IN HERITAGE (CONTRACTORS)	Freya Joukes (Altritempi) Linda Van Dijck	Loss of traditional arts and crafts Many conservation projects in Mechelen The major role of the city policy in conservation

SOURCE: OWN.

Thus, as the next step of the research, a set of indicators was developed. They were chosen on the basis of both a literature review and the aforementioned interviews with experts (the stakeholders in Mechelen, but also with Johan Van Den Bosch — the project leader of the Hoge Kempen National Park, who is also experienced in indicator analyses). The identified indicators helped to filter effects of heritage from the complicated network of socio-economic impacts present in the city structure. Moreover, they can be useful in predicting future trends and interpreting complex systems and measuring and monitoring changes in cities. Qualitative indicators provide information about the weak and strong points of a situation, while quantitative ones can reveal the magnitude of things (Ost, 2009, p. 43). All the indicators are discussed in Section *1.5.

As it was mentioned above, the data for the indicators were obtained in two ways. Some came from existing databases and study results. One of the most valuable sources was the study by De Baerdemaeker et al. (2011) about real estate prices in the main cities of Flanders. Other data were obtained with the help of the services of the city of Mechelen, such as Monumentenzorg, the Erfgoedcel, the Dienst Wonen (Housing Department) and other entities, like Altritempi. Since not all data necessary to provide indicators were already existing and available, there was a need to develop an extra tool to collect quantitative and qualitative data on the attitude of inhabitants towards the immovable heritage of Mechelen (for a survey template see Figure *20). Based on the information from the expert interviews, an analysis of the contemporary situation in Mechelen (the city's policy, new projects, history, organisations and citizens) and a list of al-

ready determined indicators (a questionnaire accompanied by a visual aid) was developed for the residents of the city. It was assessed whether every existing indicator could be filled in with available data or whether it would be necessary to obtain information from the survey. Already identified indicators were translated into questions for the questionnaire. Inspiration for these questions came from international literature on other surveys about people's perception of heritage (Auckland Council, 2011) as well as consultations with experts in the field, both practitioners and academics.



🔗 **FIGURE *4.** VISUAL INFORMATION CARD TO CLARIFY FOR THE RESPONDENTS WHAT THE DEFINITION OF “IMMOVABLE HERITAGE” IMPLIES

SOURCE: OWN.

In order to gather an adequate number of respondents, two methods of survey dissemination were employed. Firstly, the survey was available online, using the SurveyMonkey tool, already described in the previous chapters of the report. It was made available from February 26 to April 30, 2014. Advertisements for the survey were published in two editions of the *Streekkrant of Mechelen*, the official website of the city, in *De Nieuwe Maan* (a bi-monthly city magazine) and in the newsletter for volunteers of the Erfgoedcel. As these media most often reach people with university training, it was decided that face-to-face interviews would be conducted in busy areas throughout the city (pedestrian zones of IJzerenleen and Bruul), in order to reach a wider spectrum of people. With the second method, the targeted audience included mainly older people, adolescents and immigrants. This phase took place between March 6 and April 30, 2014. The survey consisted of 19 questions in total and took about 10 minutes to complete. Additional responses were also collected by 60 students studying tourism and recreation management at Thomas More University in Mechelen, all of whom had to find five respondents to the questionnaire. To control the representative sample of the survey, every student had to survey at least one person younger than 18 and one person older than 65.

Conducting research brought to the fore a series of obstacles for which alternative solutions had to be found and had to be taken into account when assessing the results of the study. The first problem concerned the availability of data and the feasibility of the indicators. Regardless of the fact that the indicators were chosen on the basis of available data, some of them still turned out not to be feasible in the end. This problem was dealt with, in some cases, by inserting a question regarding the indicator used in the survey. This did not provide any solid answers, but rather the inhabitants' perceptions or opinions.

Insufficient data sources meant that some topics had to be assessed in a qualitative, rather than quantitative manner. Some indicators were completely unachievable due to the lack of data in Mechelen and could not, therefore, be included in the survey. The limited timeframe of this study resulted in the fact that not all indicators could be filled in, and only data statistics which were already available were used. No other data besides the questionnaire was produced.

Finally, an important factor that needs to be taken into account regarding the survey is the bias inherent in this kind of research. Even the slightest change in the phrasing of a question in the survey can lead to people answering it in a different way. Additionally, there was probably a tendency among the students, studying the conservation of monuments and sites, to adapt answers of the respondents to fit the framework of the survey which was made to support immovable heritage.

*1.4

ANALYSIS OF THE DATA

The next section will provide an analysis of a selection of 6 out of the 37 assessed indicators. The first two may be situated in the economic domain, while the other four belong to the cultural domain. These indicators were chosen because they serve as excellent examples of the methodology applied in this study, and at the same time, provide a unique insight into the attitude of the inhabitants of Mechelen towards the city's heritage.

For each one of them, the same system of analysis is applied:

- description: explains what the given indicator implies and why it was chosen;
- data gathering method: explains how the data was obtained;
- typology: the classification of the indicator according to the typology of Bowitz and Ibenholt (2009) (as described in Subsection 2.3 of the report);
- results: the actual data and conclusions regarding the given indicator.

If data gathering was not possible, this section explains why.

PROFILE OF THE RESPONDENTS

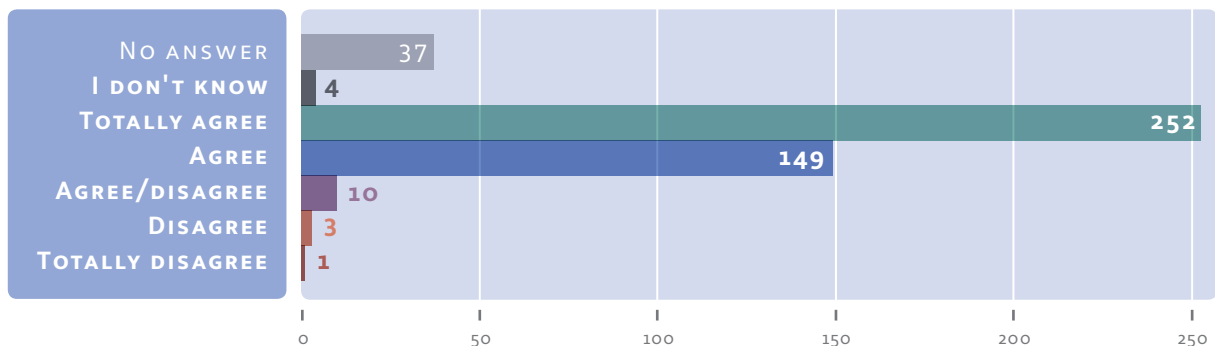
There were 456 respondents to the survey, with about half of them female and half male. Most of the respondents could be classified as “young adults” (born in 1980s and 1990s), totalling 42% of all interviewees. People over 60 years old constituted 33% of respondents. The middle group of respondents, born in 1970s and 1960s, amounted to 11% and 15% respectively.

As far as the origin of the respondents is concerned, 80% were born in Belgium (or Belgian Congo), while 13% were born abroad, including Morocco (32%), the Netherlands (15%) and Turkey (16%). The number of people born abroad is not

representative since, according to official statistics, 27% of Mechelen's citizens are of foreign origin (Stad Mechelen, 2008). For 38% of the respondents, secondary education is the highest achieved level of education. 21% completed long-type higher education programmes or university; 20% short-type higher education programmes; 12% lower secondary education; and 2% primary education. Finally, 57% of the respondents have lived in Mechelen for more than five years, 10% have lived there for one to five years, and 5% for less than one year. The remaining 28% include people interviewed on the streets, who currently do not live in Mechelen, but lived there for at least 5 years at some other point in time. Because of their strong affiliation with Mechelen, it was decided to include them in the survey.

AWARENESS OF THE IMMOVABLE HERITAGE

A part of the survey was designed to assess the awareness of Mechelen's immovable heritage among the respondents. Figure *5 presents how they responded to the statement: "I find it important that the immovable heritage is being conserved." It is to be noted that the great majority of the responses are affirmative.



❏ **FIGURE *5.** ATTITUDE TOWARDS THE STATEMENT "I FIND IT IMPORTANT THAT THE IMMOVABLE HERITAGE IS BEING CONSERVED" (N=456)

SOURCE: OWN.

Another question in the survey was aimed at identifying the benefits that immovable heritage can provide according to the respondents. As illustrated by Figure *6, many of the suggested benefits were acknowledged by the interviewees. The most acknowledged benefits include: the growth of tourism, the provision of a high quality aesthetic environment, passing on something to the future generations, conserving what the ancestors constructed, conserving cultural traditions and identity, as well as education and understanding the present by knowing the past. The idea that built heritage can provide health benefits and improve the general quality of life received less recognition from the public.

Figure *7 represents what the respondents of the survey primarily associated with Mechelen. The respondents were asked to choose three terms they asso-

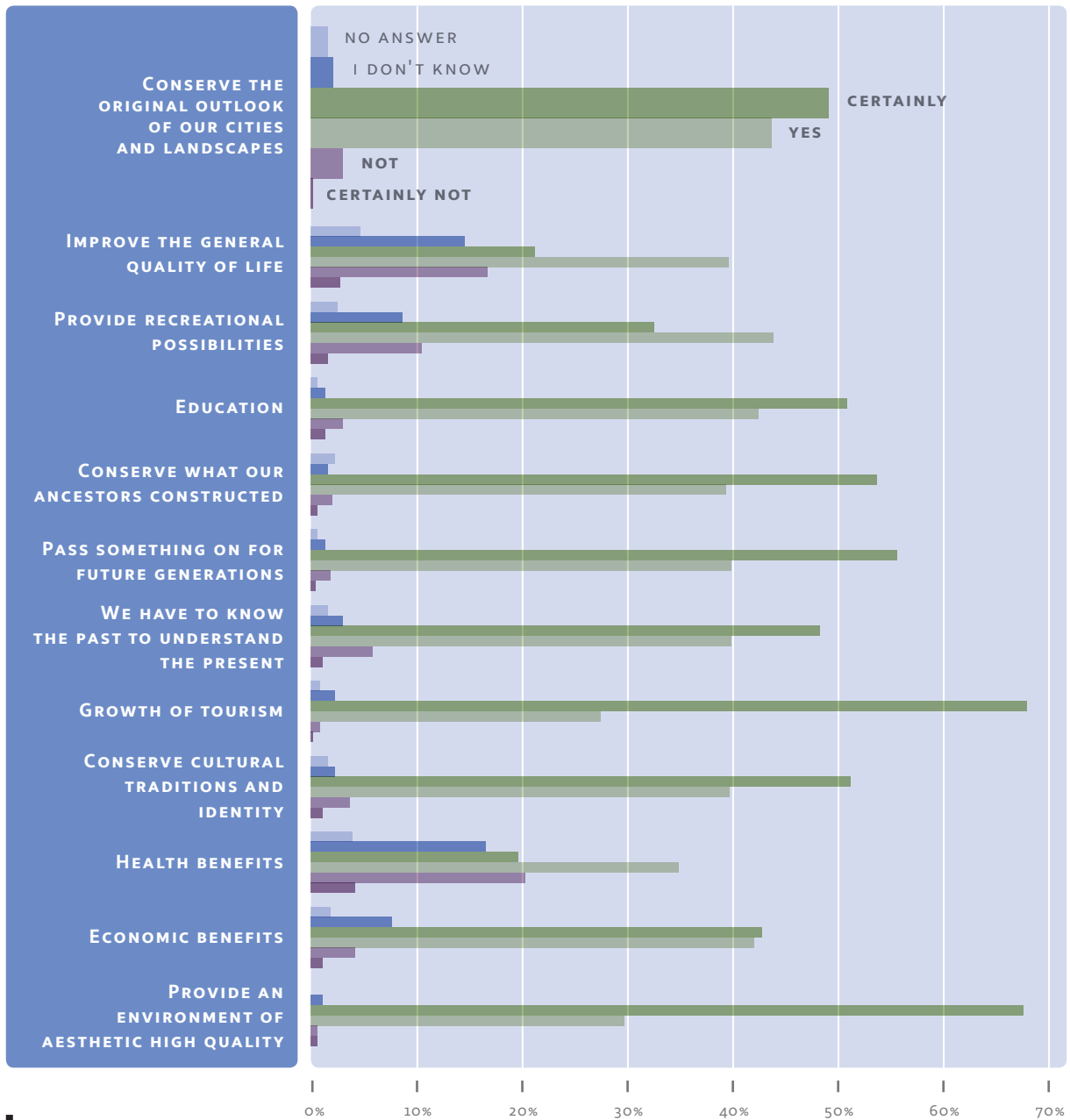


FIGURE *6. BENEFITS OF CULTURAL HERITAGE ACCORDING TO THE RESPONDENTS OF THE SURVEY

SOURCE: OWN.

ciated with the city. It should be noted that phrases “St. Rumbold’s Tower,” “historic,” “cosy,” and “beautiful” were the most frequently mentioned. This illustrates that for many of the respondents the “historic” environment and the sense of “cosiness” are indispensable characteristics of the city. It is also important that this question was asked face-to-face prior to an introduction to the survey; the respondents did not yet know that the survey focused on the heritage of the city. As in the online version, this question was the first one in the survey.

While choosing other categories of jobs for this indicator could have also been possible (e.g. caretakers of heritage), these two were selected because data on them were available.

DATA GATHERING METHOD

The method used for this indicator involved general desk research. The data were obtained from Michèle Eeman and Sofie Stevens (respectively, the head and an employee of Monumentenzorg Mechelen) and Tina Vanhoye (head of Toerisme Mechelen).

A question regarding this indicator was also implemented in the survey (statement 9 of question 6): “Does immovable heritage create employment possibilities?”.

TYPOLGY

This indicator belongs to the category of direct effects.

RESULTS

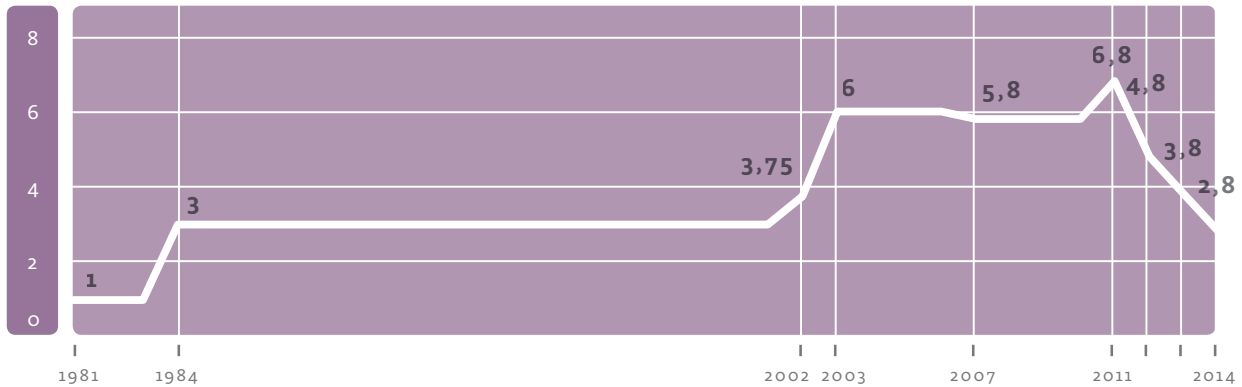
MONUMENTENZORG MECHELEN

The Monumentenzorg Mechelen was created in 1981 as a section of the Department of Urban Development. It advised and guided private owners of heritage sites in setting up the dossier of their building; it also controlled and managed the works carried out on heritage buildings. Since 2008, the service has been focusing only on a part of its original tasks, mainly managing the conservation and restoration works of churches and protected heritage buildings of the city. This means that there has been a shift in focus from private, usually smaller heritage buildings to public, larger heritage buildings (Eeman, 2014).

The number of employees at the institution varied over the years, as illustrated by Figure *8. When Monumentenzorg was created, it hired one employee (1 FTE = 1 Full Time Equivalent). Then the number increased and decreased to finally reach 3.8 FTEs in 2013, of which 1 FTE would have to be relinquished in the course of 2014. The sudden decline in employment from 2012 on was caused by the city’s need to reduce investments and staffing costs (Eeman, 2014). Considering that the Monuments Care Service of the city of Ghent has 12.8 FTEs (according to Sophie Derom, deputy director of the Monumentenzorg en Architectuur Stad Gent), the current total of 2.8 FTEs in Mechelen is a very low number.

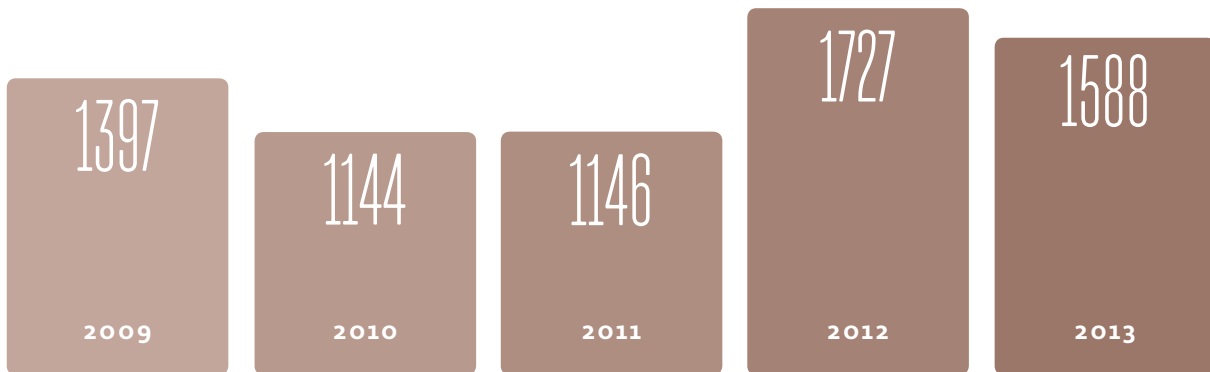
NUMBER OF GUIDES

Figure *9 illustrates the number of guided tours booked in Mechelen during the past five years (based on data obtained from Tina Vanhoye). The guided tours take about two hours and consist of a group of on average 26 persons. The guides that the City of Mechelen works with are all members of the Koninklijke Gidsenbond vzw [The Royal Guides’ Association of Bruges and West-Flanders], who have completed a tour guide training about Mechelen. All of them were recognised by Toerisme Vlaanderen [Tourism Flanders] and are members of the Federation of Guides.



❏ **FIGURE *8.** NUMBER OF EMPLOYEES OF MONUMENTENZORG MECHELEN (1981—2013)

SOURCE: OWN.



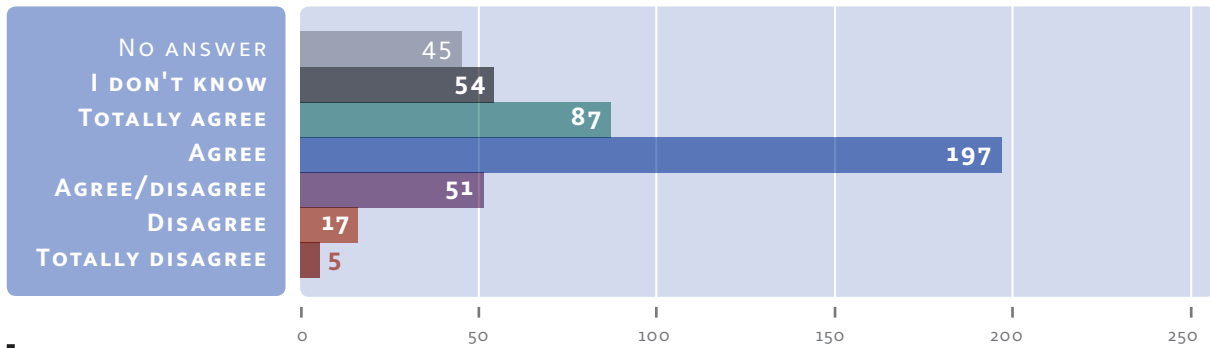
❏ **FIGURE *9.** NUMBER OF GUIDED TOURS IN MECHELEN (2009—2013)

SOURCE: OWN, based on data obtained from Tina Vanhoye.

Assuming that an average employee works about 1,840 hours per year, in 2013 the number of guides needed in Mechelen for 1,588 two-hour guided tours would have been 1.7 FTEs (based on a work schedule of 8 hours per day, 230 days per year, with weekends, official holidays and 20 days off excluded from the total count).

PERCEPTION OF INHABITANTS ABOUT THE CREATION OF JOBS BY HERITAGE

To find out what the residents' perception of job creation in the immovable heritage sector is, the following question was included in the survey: "Does immovable heritage create employment opportunities?" The scale of the answers ranged from "I totally disagree" to "I totally agree." Figure *10 illustrates that 62.2% of the respondents totally agree or agree with the statement that immovable heritage creates employment opportunities. Only 4.8% disagree or totally disagree. This means that the majority of the respondents feel that immovable heritage can contribute to developing employment and supporting households.



🔗 **FIGURE *10.** ANSWERS TO SURVEY QUESTION: “DOES THE IMMOVABLE HERITAGE CREATE EMPLOYMENT POSSIBILITIES?” (N=456)

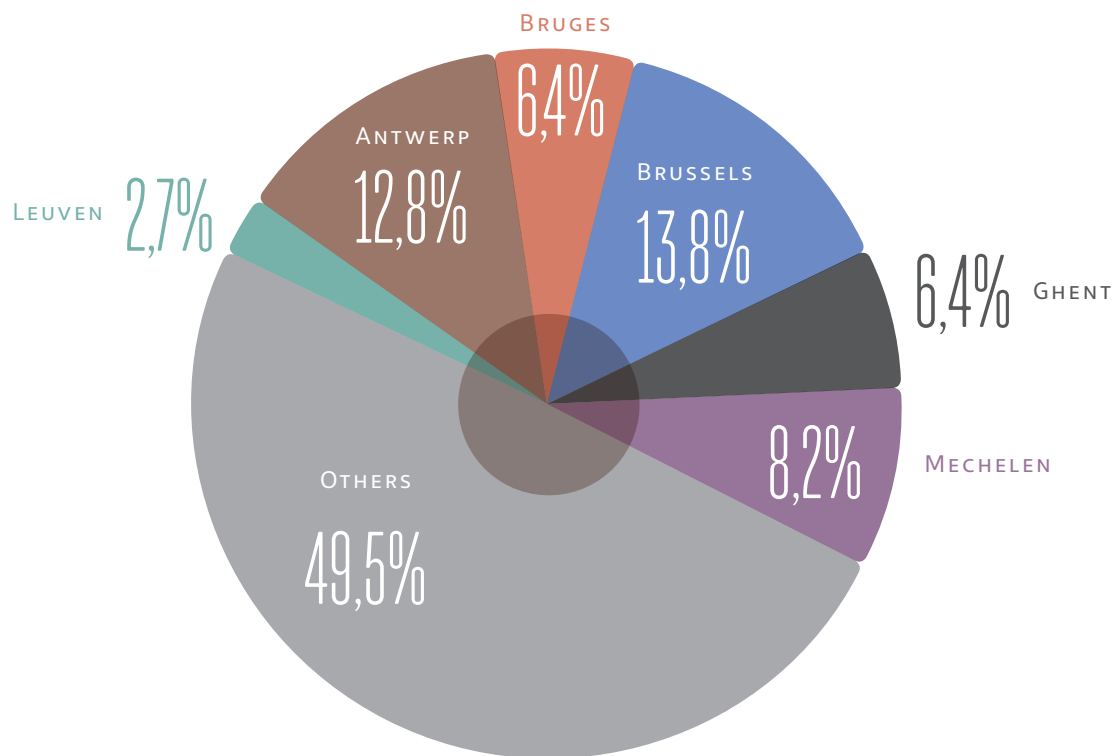
SOURCE: OWN.

● ECONOMIC DOMAIN — MAINTENANCE AND RESTORATION WORKS

Indicator 8: turnover of heritage-related contractors

DESCRIPTION

This indicator illustrates the turnover that certain contractors obtain thanks to Mechelen’s immovable heritage. Following an interview with Freya Joukes of Altritempi (Joukes, 2014), a company that specialises in decorative stucco plas-



🔗 **FIGURE *11** NUMBER OF ALTRITEMPI’S PROJECTS FROM 2002 TO 2013 ACCORDING TO THEIR LOCATION (IN %) (N=109)

SOURCE: OWN, BASED ON DATA OBTAINED FROM FREYA JOUKES.

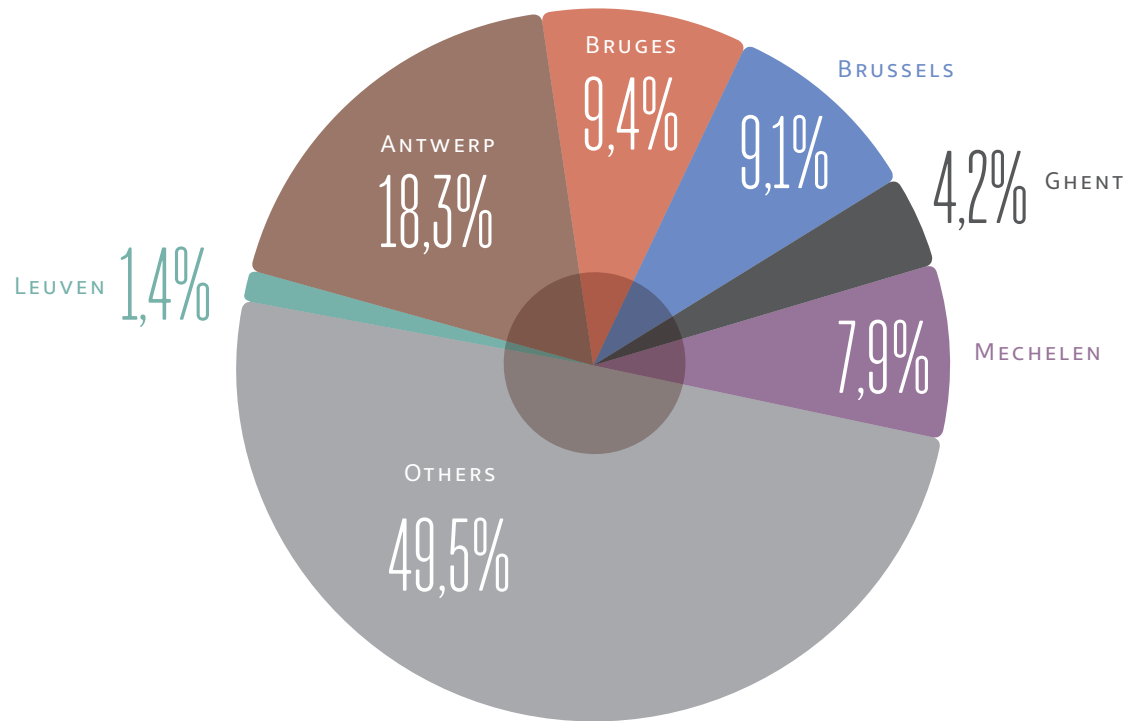


FIGURE *12. TURNOVER OF ALTRITEMPI'S PROJECTS FROM 2002 TO 2013 ACCORDING TO THEIR LOCATION (IN %) (N=109)

SOURCE: own, based on data obtained from Freya Joukes.

tering, cabling, and restoration painting techniques (Group Monument, 2013), it was decided to include this indicator. Joukes stated that the city of Mechelen was one of the constant customers of the company. According to her, the city's heritage policy and Monumentenzorg were the driving forces behind this trend (Joukes, 2014).

TYPOLGY

This indicator can be classified as a direct effect.

DATA GATHERING METHOD

The data were obtained from Freya Joukes and consist of a list of Altritempi's projects from 2002 to 2013.

RESULTS

In Figure *11, the analysis of Altritempi's 109 projects from 2002 to 2013 are depicted. Nine projects of the 109 (8.2%) were conducted in Mechelen, which is more than in other art cities, such as Bruges, Ghent, and Leuven.

When it comes to the turnover from the projects, Mechelen provided for 7.9% of all incomes; this is less than Antwerp, Bruges and Brussels, but more than Leuven and Ghent (Figure *12).

↑
BACK TO:
THE 10 KEY
FINDINGS

This indicator demonstrates that Mechelen provides for about 8% of all projects and income of Altritempi. Even though this example might not be representative for other similar contractors in the same sector, these data do demonstrate that the heritage of Mechelen covers almost 1/12 of the total turnover of at least one contractor.

● CULTURAL DOMAIN — CIVIC PRIDE

Indicator 14: the inhabitants' and tourists' opinions about the image of Mechelen

DESCRIPTION

This indicator aims to estimate the impact of immovable heritage on the image of Mechelen. Mechelen used to have the reputation of a vulnerable city stuck between Brussels and Antwerp, but during the past decade it has slowly disengaged itself from being the “Chicago by the Dijle” (Ysebaert, 2014). The city has undergone a true metamorphosis and has grown out to become a vibrant city: one that is pleasant to live in, work in, and visit.

As the image of a city is something that is difficult to assess in an objective way, the aim of this indicator was to look at how the respondents feel about the image of Mechelen, and more precisely, whether they think that the projects concerning heritage conservation and restoration have contributed to the new image of the city.

DATA GATHERING METHOD

The data were obtained from the questionnaire through two questions (questions 8 and 9): “Do you think that Mechelen has developed a new image over the past decade?” and “According to you, which factors have contributed to this new image? (1) A famous mayor; (2) an improved connection with the Dijle; (3) revaluation of green spaces; (4) attracting young families; (5) the conservation and restoration projects of heritage buildings; or (5) the large number of new construction projects?”. The data concerning tourists comes from the WES study (WES, 2012).

TYPOLGY

This indicator is categorised as a gravitation effect.

RESULTS

THE RESPONDENTS OF THE SURVEY

Only 9.4% of the respondents answered negatively to the statement about whether Mechelen had developed a new image over the past decade. An overwhelming majority was convinced that the city had changed its image.

According to these 84% who thought Mechelen had garnered a new image, the heritage projects and revaluation of green zones had played the biggest role in this process. 88.5% of the respondents considered heritage projects and 84.1% considered green zones as significantly contributing to this trend (Figure *13). The

least important factor according to the respondents was their famous mayor. In general, it can be stated that all six categories were deemed by the respondents to have had a certain influence on the city's new image.

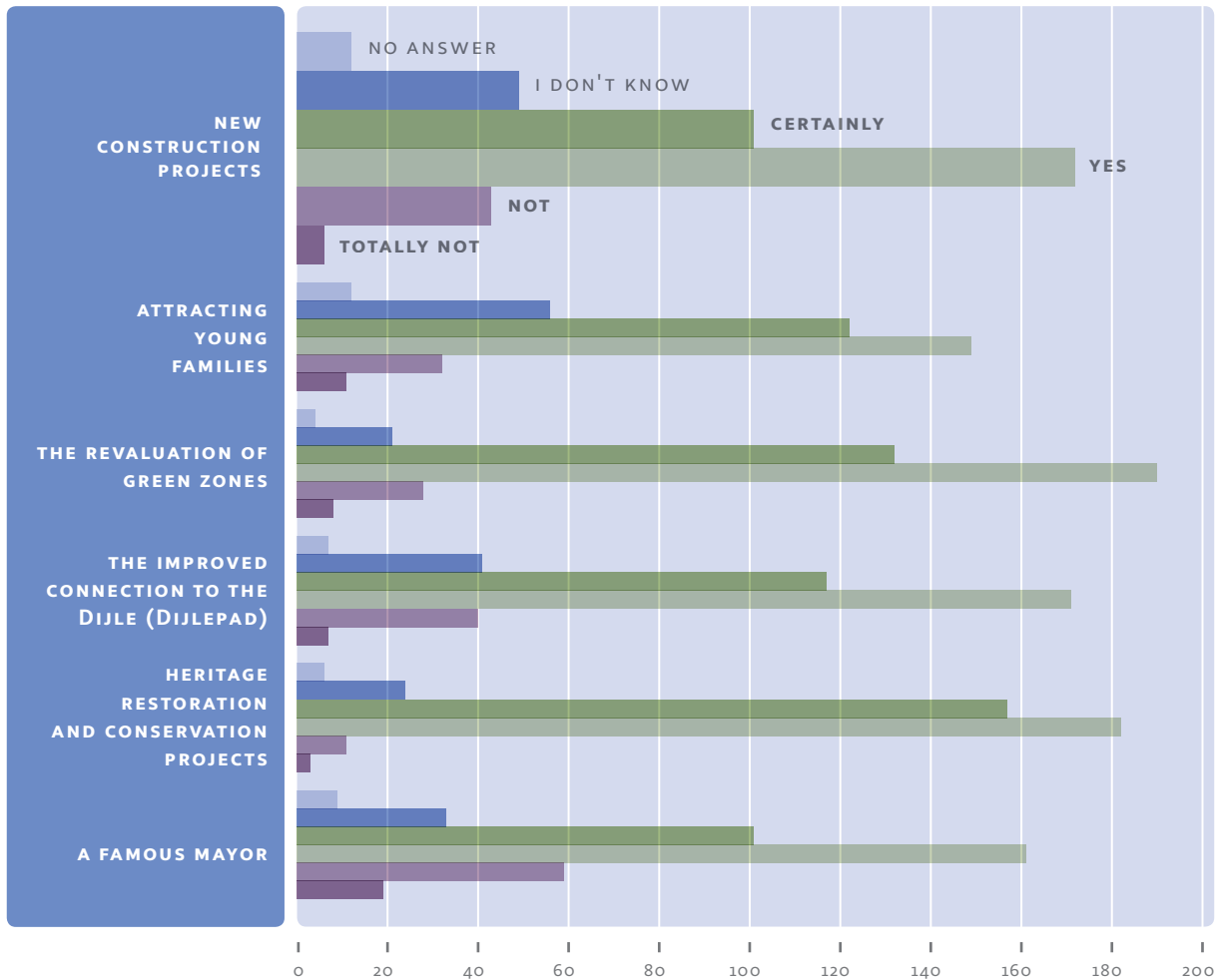


FIGURE *13. ANSWERS TO SURVEY QUESTION: "WHAT PLAYED A ROLE IN GARNERING THIS NEW IMAGE?"

SOURCE: OWN.

THE TOURISTS

Figure *14 shows that Mechelen's image is most comparable to that of Leuven and Antwerp according to tourists. It is mostly recognised for its authentic architecture, delightfulness, beauty, nice atmosphere and rich history. What is most interesting is the evolution of the image of Mechelen from 2005 to 2011 and the increase of the importance of art historic sites for the tourists (WES, 2012, p. 34). This might indicate that the belief shared by tourists and inhabitants in the fact that the heritage of Mechelen has contributed to the development of a new image by the city is correct.



● **FIGURE *14.** THE IMAGE OF MECHELEN IN THE EYES OF TOURISTS

SOURCE: own, based on (WES, 2012, p. 32).

● CULTURAL DOMAIN — CIVIC PRIDE

Indicator 15: opinion of people about immovable heritage contributing to their feeling of identity

DESCRIPTION

People from Mechelen are known in Belgium as “Maneblussers” [moon extinguishers], a term that originates from a story from the end of the 17th century about a supposed fire in the Saint Rumbold’s Tower, that turned out to be only the rays of the moon giving the illusion of flames. This indicator assessed whether people felt that the rich cultural heritage of Mechelen contributed to their feeling of being a Mechelaar. Tina Vanhoye stated during an interview that people from Mechelen “are in general very proud of their monuments” (Vanhoye, 2014).

DATA GATHERING METHOD

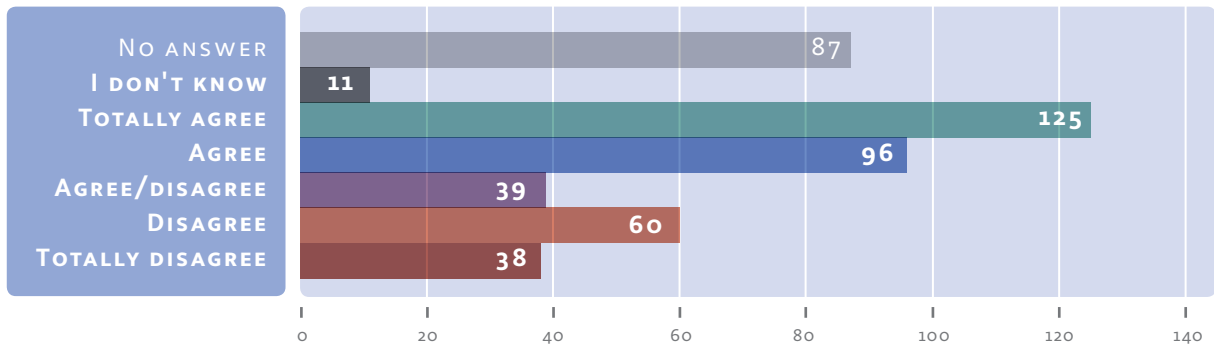
In the questionnaire, two questions regarding this indicator were asked (statements 7 and 8 of question 6): “Do you feel like a real Mechelaar?” and “Does immovable heritage contribute to this feeling?”.

TYPOLGY

This indicator is a gravitation effect.

RESULTS

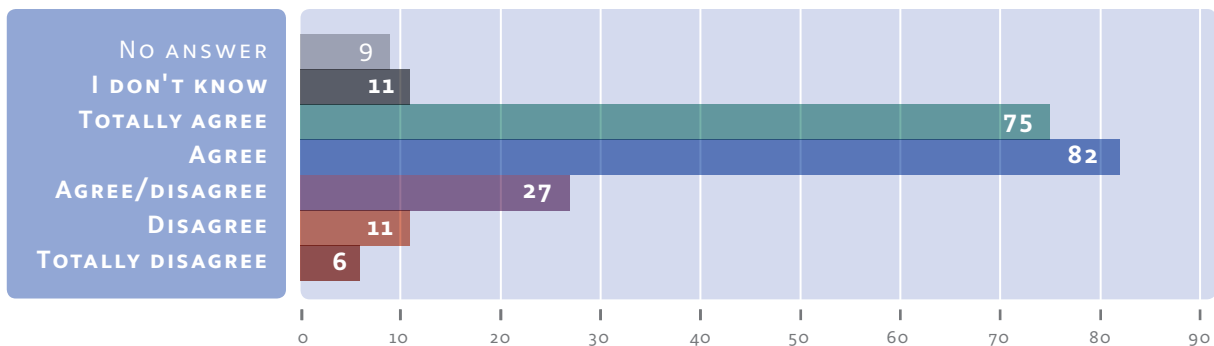
Figure *15 shows that 21.5% of the respondents do not feel like a Mechelaar (answered “totally disagree” or “disagree”), 8.5% more or less feel like a Mechelaar (answered “agree/disagree”) and 48.5% really feel like a true citizen of Mechelen (answered “totally agree” and “agree”).



● **FIGURE *15.** ANSWERS TO SURVEY QUESTION: “DO YOU FEEL LIKE A REAL MECHELAAR?” (N=456)

SOURCE: OWN.

Figure *16 below illustrates that out of these 48.5% (221 people) who feel like a Mechelaar, 71% confirmed that their identity as a Mechelaar partly relies on the immovable heritage of the city.



● **FIGURE *16.** ANSWERS TO SURVEY QUESTION: “DOES THE IMMOVABLE HERITAGE CONTRIBUTE TO YOUR FEELING OF BEING A MECHELAAR?” (N=456)

SOURCE: OWN.

● CULTURAL DOMAIN — CITY REVITALISATION

Indicator 18: opinion of inhabitants about a trade-off between a heritage and a non-heritage building

DESCRIPTION

This indicator is in a way linked to the non-use values of heritage: do people get satisfaction from the existence of heritage in their surroundings? This indicator was also used for the valuation study of the Hoge Kempen Park. Johan Van Den

Bosch stated during an interview that in this case, “a trade-off can give an idea of the impact of heritage on people’s lives: do they value recreational buildings over monuments?” (Bosch, 2014).

The question in the survey offers the respondents a choice between two options and aims to assess how much cultural value (namely the Hanswijk Basilica) they would be willing to give up for the establishment of a new structure that would provide more amenities.

In this case, the aesthetic aspect of the heritage and its contribution to city revitalisation played a key role. While canvassing throughout the city, it was noticeable that many of the respondents answered this question taking only the aesthetic aspect of the Basilica into consideration. It is worth mentioning that many interviewees had no knowledge of what the Hanswijk Basilica was exactly. Nevertheless, after describing the monument as “the Basilica along the Dijle with the dome, facing the Botanical Garden,” the majority of respondents did not want to trade it for anything else because they valued it highly.

The Hanswijk Basilica was chosen for this question because it originates from the 17th century and it has been a popular place of pilgrimage ever since. It is a hot topic in the context of the discussion about the future of the religious heritage in Flanders and the concept paper of the Flemish government from 2011 concerning the future of Flemish parish churches (Vlaamse Overheid, 2011).

The Hanswijk Basilica is currently still used for its original purpose, as it offers two church services on Sundays, with about 225 to 400 churchgoers per weekend, and one mass on a weekday (which brings in about 5 to 8 people) (information obtained from Fernand Verreth, head of the Church Fabric, Verreth, 2014).

In terms of future plans for the building and space, respondents were given the choice of several new potential functions based on relevance and popularity of the option. These included a crèche (there are not enough in Flanders), a gym, a football stadium (for KV Mechelen, the city’s soccer team), and a park or shopping centre, as both are popular places of leisure.

DATA GATHERING METHOD

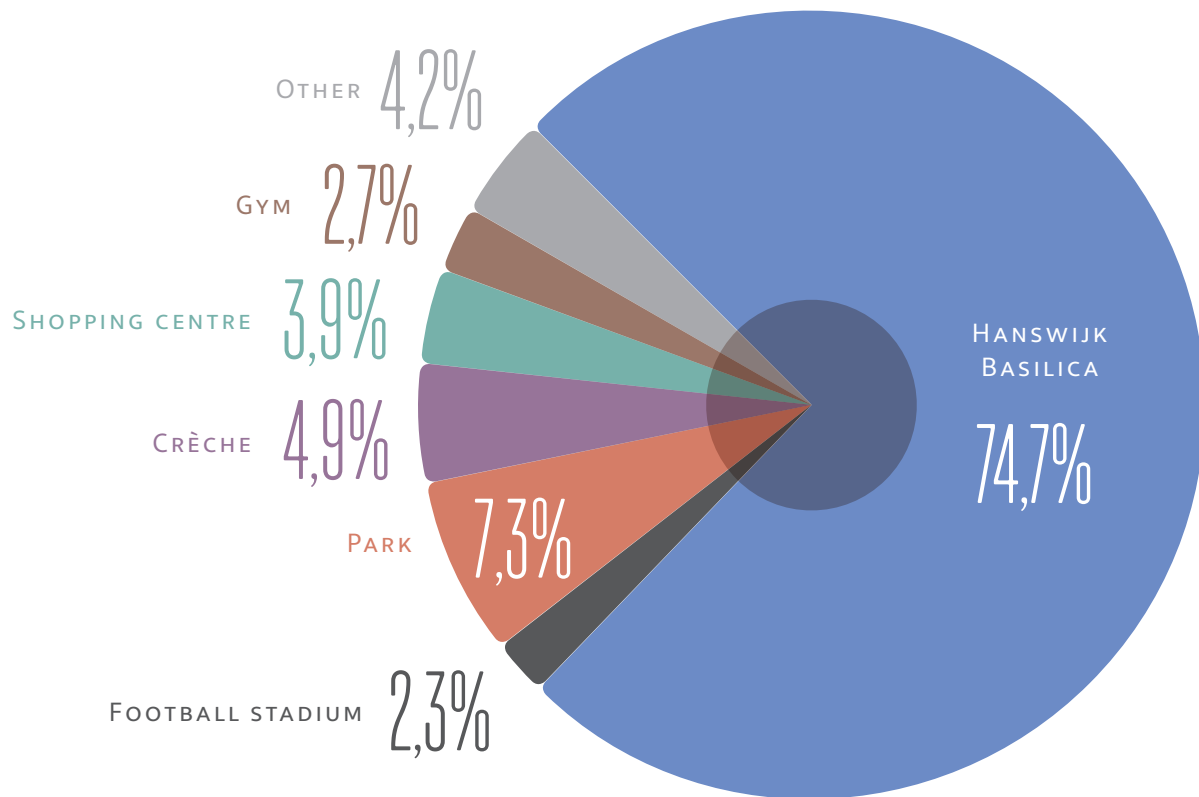
The results for this indicator were obtained through the questionnaire. The question asked was “Suppose that the city would decide to demolish the Hanswijk Basilica. Would you prefer to have any of the following buildings, or would you prefer to keep the original church?” (question 12). The suggested replacement buildings included: a football stadium, a park, a crèche, a shopping centre, and a gym — but there was also a possibility to put forward other options.

TYPOLGY

This indicator belongs to the non-economic effects.

RESULTS

The results of the questionnaire illustrate that three-fourths of the respondents would prefer the Hanswijk Basilica over any other building (Figure *17). Only 7%



❏ **FIGURE *17.** ANSWERS TO THE SURVEY QUESTION: “WHICH BUILDING WOULD YOU PREFER OVER THE HANSWIJK BASILICA?” (N=456)

SOURCE: OWN.

would choose a park, 5% a crèche, 4% a gym or a shopping centre and only 2% a football stadium. Other suggestions from the respondents included a hotel, a mosque, a concert hall and a socio-cultural meeting place.

On the basis of these results, one can conclude that the Hanswijk Basilica is highly valued by the inhabitants of Mechelen. Most of them would not want to trade it for any other building, even if this new building would have a higher functional value for the community. The majority of the respondents felt that the Basilica was an important part of the cityscape.

● CULTURAL DOMAIN — QUALITY OF LIFE

Indicator 19: willingness to pay by inhabitants for the entrance to a heritage monument

DESCRIPTION

Using a non-market valuation method, it is possible to make a monetary estimate of the impact of Mechelen’s immovable heritage on people’s attitudes. This indicator assesses how much people would be willing to pay for an entry

ticket to Mechelen's most prominent monument: the Saint Rumbold's Tower. The tower has been open to the public since 2009 and is accessible for 99 visitors at a time. An ascent of 538 stairs brings visitors to a skywalk at the top of the tower (97 metres high), providing them with a panorama view reaching as far as the Atomium of Brussels and the harbour of Antwerp.

DATA GATHERING METHOD

The data were obtained by means of two questions in the questionnaire: "The current admission ticket to the Saint Rumbold's Tower costs 7 EUR per person. If you were able to choose freely, how much would you be willing to spend on an entry ticket?" (question 13) and "On what would you want your admission money to be spent? Restoration and maintenance, guided tours, a souvenir shop, audio guides, activities involving the youth or socially marginalized, a café, other?" (question 14).

TYPOLGY

This indicator belongs to the non-economic effects.

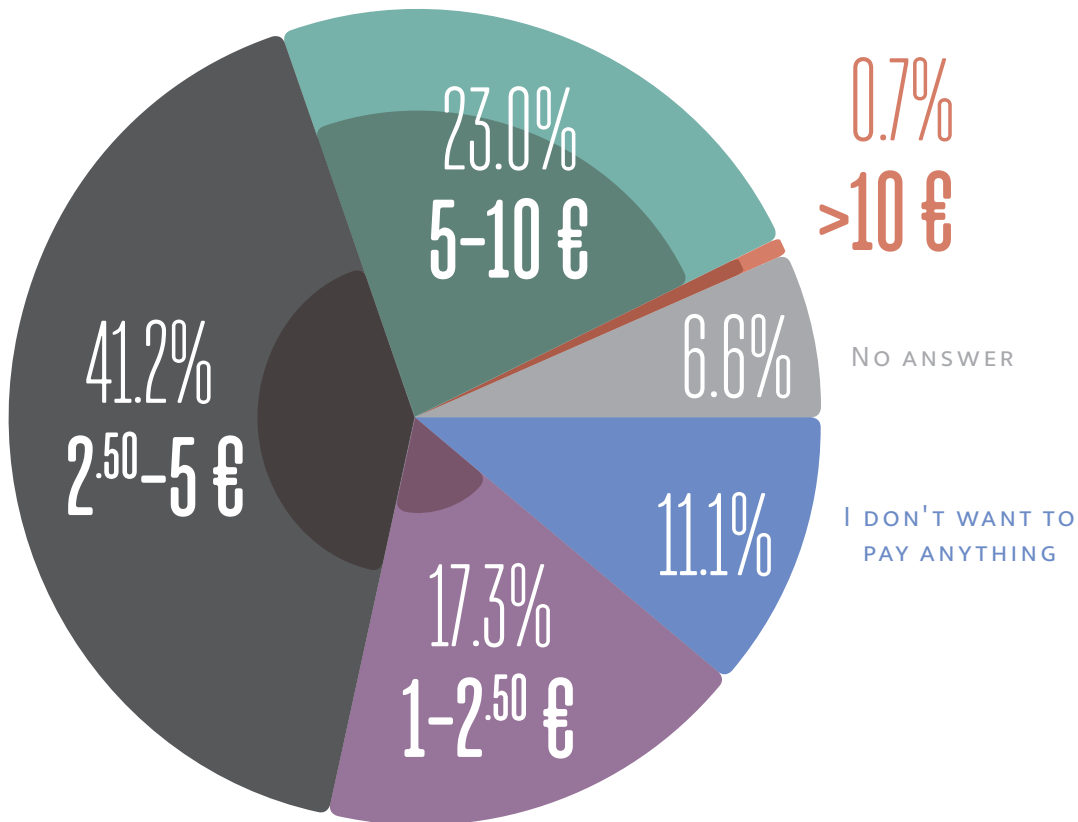


FIGURE *18. ANSWERS TO SURVEY QUESTION: "HOW MUCH WOULD YOU PAY TO ENTER THE SAINT RUMBOLD'S TOWER?" (N=456)

SOURCE: OWN.

RESULTS

Figure *18 below shows that almost half of the respondents would be willing to pay 2.5-5 EUR to enter Saint Rumbold's Tower, while about a quarter of them valued the entrance even higher, ready to pay 5-10 EUR. There is also a group (17.3% of the respondents) that would pay only 1 to 2.5 EUR. This means that 69.6% of the respondents found the current entry price of 7 EUR to be quite steep. While surveying on the streets, it was noticeable that many of the respondents were strong proponents of the idea that inhabitants of the city should be able to visit the tower for free (which is currently not the case). To study willingness to pay in-depth, more research and a more elaborate survey is needed.

The amount of money respondents claimed they would be willing to pay should be assessed in a critical way. People's answers to these kinds of questions do not always reflect what they would actually pay in real life (Throsby,

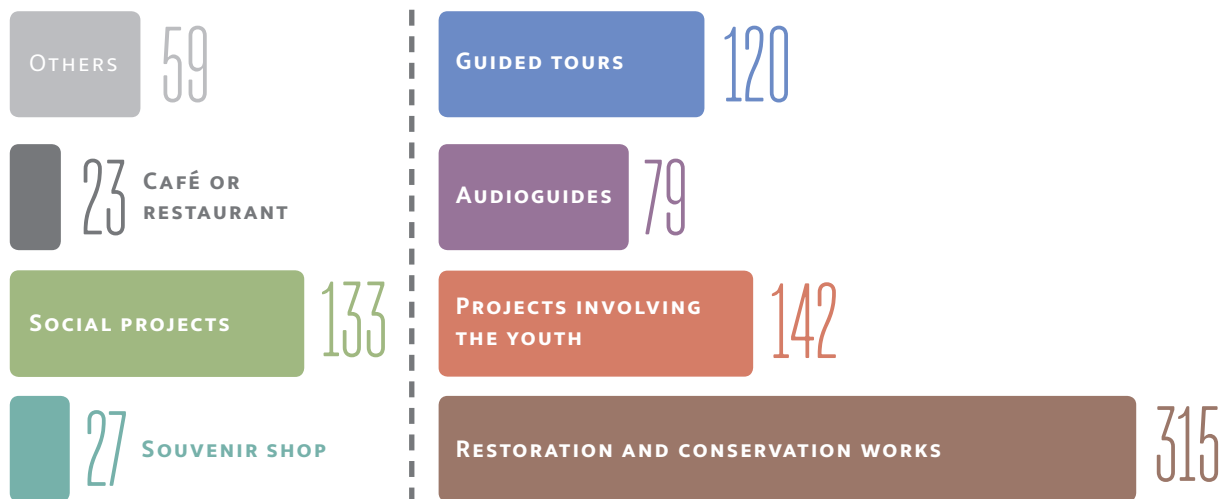


FIGURE *19. ANSWERS TO SURVEY QUESTION: "ON WHAT WOULD YOU WANT YOUR ADMISSION MONEY TO BE SPENT?" (N=456)

SOURCE: OWN.

2003, p. 278). Looking at Figure *19, it becomes clear that the majority of the respondents would prefer their money to be spent on the restoration and maintenance of the building. Almost one-third would like it to be invested in activities involving youth, a bit less would prefer more social projects, while one-quarter of the respondents would choose guided tours and 17.3% audio guides. Only 13.1% would like the money to be spent on a souvenir shop, a café or restaurant. Others answered that the money should be spent on biodiversity of animals (such as owls), an elevator, or the promotion of the tower by means of advertisements.

● SUMMARY OF ALL INDICATORS

● TABLE *1. SUMMARY OF INDICATORS

DOMAIN	SUBDOMAIN	INDICATOR	RESULTS
ECONOMIC	Cultural tourism	Amount of visitors and their expenditures	180,000 night visits, 775,000 day trips and 55 million EUR of income (in 2011)
		Accessibility of the city	Easy to reach by car, bus, train. Twelve parking lots and tourism signage throughout the city
		Number of heritage-related events in the city	No data
	Jobs	Amount of jobs directly related to heritage	2.8 FTEs in Monumentenzorg (in 2014) and 1.7 FTEs guides (in 2013)
		Amount of jobs indirectly related to heritage	No data
	Maintenance and restoration works	Estimate of the city for future maintenance and restoration works of the immovable heritage	33,850,000 EUR from 2014 to 2019
Amount of contractors active in Mechelen and their activities		No data	
Turnover of heritage-related contractors (example)		8% of the turnover of Altritempi from 2002 to 2013 came from projects in Mechelen	
Real estate	Rental values of heritage	No data	
	Property prices in the proximity of heritage	An increase of 257% in real estate prices in Mechelen from 2002 to 2012	
Attracting new investments	Opinion of people about heritage as a factor to attract new investments	40% of the respondents rank this factor as the least important out of six when setting up a new investment	
CULTURAL	Education	The influence of heritage on students' knowledge about their culture's past	No data. 71% of respondents think that it should get more attention in class
		Offer of specialised studies related to heritage in schools	In Mechelen, there are 5 studies related to immovable and 2 to movable heritage
	Civic pride	Opinion of inhabitants about the image of Mechelen	84% of the respondents think that Mechelen has obtained a new image and heritage projects are rated as the biggest contributing factor
		Opinion of people about immovable heritage contributing to their feeling of identity	48.5% of the respondents identify themselves as Mechelaars, of which 71% state that the built heritage contributes to this feeling
	Recreation	Number of recreational activities taking place in the heritage	No data, but 85.3% of the respondents have visited a heritage building in Mechelen in the past
Number of visitors on Open Monuments Day		14,662 visitors in Mechelen in 2013	
City revitalisation	Opinion of inhabitants about a trade-off between a heritage and a non-heritage building	74.7% of the respondents would prefer to keep the heritage building (the Hanswijk Basilica)	
Quality of life	Willingness to pay by inhabitants for the entrance to a heritage monument	41.2% of the respondents would be willing to pay 2.5 to 5 EUR, 23% 5 to 10 EUR, 17.3% 1 to 2.5 EUR and 11.1% nothing	
	Preference of people for their residence	18.8% and 6.6% of the respondents would mostly like to live in a protected or an unprotected heritage building in the urban centre respectively	

SOCIAL	Policy	Opinion of inhabitants about the policy on the conservation and maintenance of heritage	57.9% of respondents agree with the number of organised heritage projects, while 17% think the city invests too much money in these projects
	Cultural tourism	Carrying capacity on a social level	Inhabitants are not disturbed by tourists
		Satisfaction of visitors coming to Mechelen	Large majority of the tourists are satisfied with their visit to Mechelen
	Social cohesion	The amount and popularity of initiatives related to immovable heritage	No data
		Perception of involvement of the inhabitants in heritage	More or less 50% of the inhabitants feel they are involved in heritage
Number of heritage related activities involving minority groups		No data	
Education and personal development	Increase of awareness of heritage (including its history) by the inhabitants	72% of the respondents agree that heritage should be addressed frequently in school	
Quality of life	Opinion on feelings of safety: increased/decreased feeling of safety in the city	65% of the respondents feel safe in Mechelen and 46% acknowledge that this feeling has altered during the past decade	
	Increase or decrease of crime statistics in Mechelen	No noteworthy change during the past decade	
	Feeling of well-being of the inhabitants	No data	
	Increase of interest in living in heritage buildings	20% of the respondents would prefer to live in a protected building and 7% in an unprotected heritage building inside the city centre	
ENVIRONMENTAL	Reduction of emission and pollution	Amount of pollution related to heritage	No data
	Energy efficiency	Energy consumption of heritage buildings	No data
		Accessibility and congestion related to heritage	No data
Quality of life	Development of green areas related to heritage	No data	
	Carrying capacity on an ecological level	No data	
	Heritage as part of the urban planning	No data	

SOURCE: OWN.

*1.6

CONCLUSIONS

The study has illustrated that Mechelen is a city which is characterised by a strong inter-relationship between urban fabric, cultural heritage and the people. The historic urban environment's value can be acknowledged in a variety of ways, from a contribution to quality of life to providing a sense of cultural identity and economic growth. The case study was an attempt to provide an indicator-based assessment of the socio-economic impacts of the immovable heritage of Mechelen. However, it is very difficult to prove a causality between the presence of heritage and its impacts on society. What can be stated is that there is a cor-

Survey on the impact of immovable heritage in Mechelen

1. Place of the survey

***2. Date and point in time of the survey**

DD MM YYYY HH MM AM/PM
 Vandaag / / : :

***3. What are the first three words you associate with Mechelen?**

***4. For how long have you been living in Mechelen?**

Less than one year
 Less than or equal to five years
 More than five years
 I don't live in Mechelen

***5. How involved are you with the heritage of Mechelen? Involvement in heritage can occur in several ways: examples could be being interested in heritage-related activities or being a member of organizations supporting cultural heritage.**

Very limited Limited Large Very large

Survey on the impact of immovable heritage in Mechelen

***6. We would like to know what your opinion is about the following statements.**

	Totally disagree	Disagree	Agree/disagree	Agree	Totally agree	I don't know	No answer
I think tourism is important for Mechelen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mechelen attracts a large amount of tourists	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I'm bothered by the amount of tourists	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tourism in Mechelen will increase during the following years	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel safe in Mechelen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My feeling of safety in Mechelen has changed during the past decade	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel like a true citizen of Mechelen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The immovable heritage of Mechelen contributes to this feeling of identity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Immovable heritage creates employment opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The conservation of immovable heritage is important to me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am satisfied with the immovable heritage policy of the city	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The city conducts a sufficient amount of heritage conservation or restoration projects	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The city invests too much money in its immovable heritage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Schools in Mechelen should pay attention to heritage-related topics in class	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Survey on the impact of immovable heritage in Mechelen

***12. Suppose that the city would decide to demolish the Hanswijk Basilica. Would you prefer any of the following buildings or would you prefer the original church to remain?**

	Rather the Hanswijkkerk	Rather this building	I don't know
Football stadium	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Park	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Crèche	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shopping center	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gym	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)	<input type="text"/>		

***13. The current admission ticket to the Saint Rumbold's Tower costs 7 euros per person. If you were able to choose freely, how much would you be willing to spend on an entry ticket?**

I don't want to pay anything 1 to 2.5 euros 2.5 to 5 euros 5 to 10 euros More than 10 euros

Entry price

14. On what would you want your admission money to be spent?

Conservation and restoration works

Projects involving youth
 Audioguides
 Guided tours
 Souvenir shop
 Social projects
 Café or restaurant
 Other (please specify) _____

***15. Year of birth**

***16. Place of birth**

📍 **FIGURE *20.** SURVEY ON THE IMPACT OF IMMOVABLE HERITAGE IN MECHELEN

SOURCE: OWN.

Survey on the impact of immovable heritage in Mechelen

- More buildings should obtain a heritage status in Mechelen
- I have visited a heritage building in Mechelen in the past

***7. Does immovable heritage contribute to the following benefits according to you?**

- | | Certainly not | No | Yes | Certainly | I don't know | No answer |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Provide an attractive environment (historic city center) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Economic benefits (e.g. the growth of tourism) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Health benefits (e.g. the provision of a clean environment or sport facilities) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Maintaining identity and cultural traditions | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Stimulation of tourism | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| To understand the present, we need to know the past | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Pass on something to the future generations | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Maintain what our ancestors have constructed | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Education (impart people on the history of our culture) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Creation of recreational opportunities | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Increasing the general quality of life | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Maintain the original outlook of our towns and rural landscapes | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Survey on the impact of immovable heritage in Mechelen

***8. Mechelen has changed considerably during the past decade and has obtained a new image.**

- Agree
 Disagree

***9. Which factors have played a role in the acquirement of this new image?**

- | | Certainly not | No | Yes | Certainly | I don't know | No answer |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| A famous mayor | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| General maintenance, conservation and restoration works of the cultural heritage | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The improved connection with the Dijle (Dijlepad) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Beautification of green zones | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Attraction of new families | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The many new construction projects | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

***10. Where would you prefer to live?**

- In a new building inside the historic city center
 In a new building outside the historic city center
 In a protected heritage building inside the historic city center
 In an unprotected building outside the historic city center
 In a rural environment
 Other (please specify) _____

***11. Which factors play a key role in attracting new commercial enterprises to the city according to you? (1 is the most important factor, 6 is the least important).**

- The immovable heritage of Mechelen
 Combination of a modern and historic environment
 Financial considerations
 Policy of the city
 The attainability of the city
 Safety of the city

Survey on the impact of immovable heritage in Mechelen

***17. Gender**

- Female
 Male

***18. Highest obtained diploma**

- University/Higher education of the long type
 Higher education of the short type
 Secondary school
 Lower secondary school
 Primary school

***19. Did you choose your current residence because of its heritage value?**

- Yes
 No
 I don't know
 No answer

relation between the two: heritage can exert a certain effect on an economic, cultural, social and environmental domain but other factors also play a significant role in this process of impact.

It must be stressed that this research is based on secondary data sources supplemented with evidence from stakeholder consultations and on the findings of the conducted survey. The test sample with 456 respondents in the form of a survey can nevertheless provide suggestions about a link between socio-economic impacts and the immovable heritage. More research is needed in order to acquire a more comprehensive and detailed understanding of this link, especially in light of the lack of available data with regard to some of the indicators.

*2

IMPACT OF MUSEUMS IN HISTORIC BUILDINGS IN POLAND: THE CASE OF THE GALLERY OF POLISH 19TH-CENTURY ART IN KRAKOW AND THE MS² (MUZEUM SZTUKI) IN ŁÓDŹ

*2.1

INTRODUCTION

As discussed in Section 3.7.2, there is a relatively small number of evaluations of cultural heritage impact in Central Europe. Therefore, choosing a case-study for the CHCfE project from this region was based on the assumption that new projects, supported by the EU and EEA funds, should be selected since they should have implemented some sort of system of monitoring impacts on their socio-economic context. Two projects that seemed to illustrate the challenges of the CHCfE project as well as benefits produced by cultural heritage were identified. These are: renovation and modernisation of the Gallery of Polish 19th-Century Art, a branch of the National Museum in Krakow located in Sukiennice, and the conversion of a former weaving plant and its adaptation to the seat of ms², a branch of Muzeum Sztuki [Museum of Art] in Łódź. Given the scope of the CHCfE project, the analysis of Polish case studies was based on existing data and documents only. The chosen methodology was a comparative analysis based on a literature review and data collected by the museums. Yet, the assumption that new investments would generate sufficient amount of evaluation studies proved to be too optimistic. Nevertheless, it is possible to draw a number of observations and conclusions related to the manifold impact of heritage. Available data were examined and then grouped in a number of subdomains

of impact that are presented in Figure *20 and elaborated on in the next sections. Chosen subdomains correspond to the results of the literature review presented in the meso level of this report and the four pillar approach developed therein. The authors are aware that the scope of the subdomains might overlap and certain activities or facts about the museums may contribute to more than one subdomain (it is for example quite visible when discussing the quality of life, social capital and education). Due to the limits of the project, the following analyses are by no means comprehensive nor exhaustive. Their goal is to depict that even with limited information it is possible to present a preliminary analysis based on the four pillar approach logic. This analysis proves that investing in cultural heritage infrastructure influences the socio-economic as well cultural and environmental context of the projects.



❶ **FIGURE *20.** IMPACT OF THE MUSEUMS IN KRAKOW AND ŁÓDŹ ON VARIOUS SUBDOMAINS OF THE HOLISTIC FOUR DOMAIN APPROACH (ECONOMY, SOCIETY, CULTURE AND ENVIRONMENT)

SOURCE: OWN.

*2.2

RENOVATION AND MODERNISATION OF THE GALLERY OF POLISH 19TH-CENTURY ART, A BRANCH OF THE NATIONAL MUSEUM IN KRAKOW

Sukiennice [the Cloth Hall] is one of Krakow's most iconic buildings as well as one of the most precious and well-known monuments in Poland. Erected in the Middle Ages when Krakow "developed a specialisation in transit trade, supplying northern Europe with the copper mined in Spiš, Hungary [...], exporting Baltic herring to the South, and above all handling the trade in English, Flemish and Dutch cloth" (Purchla, 2000, p. 35), Sukiennice occupies the central space of the Main Market Square. Over the years the building underwent many changes, upgrades and modernisations, including reconstruction in the 14th century on the order of King Casimir III the Great (introducing a double line of stalls measuring 108 metres in length and 10 metres in width, covered with vaults and open to the interior with a pointed or semi-circular portal) and the reconstruction after the fire in 1555 (the great hall of Sukiennice got a new barrel vault, the building was finished with an attic with arcade divisions, and new column loggias, designed by Giovanni Maria Padovano, were added). It was, however, the 19th century that determined the present-day function and shape of both Sukiennice and the whole Main Market Square. Though Krakow lost its economic importance, it became a symbol of patriotism and Polish sovereignty (at that time Poland did not exist, its territories having been annexed by Russia, Austria and Prussia, with Krakow belonging to the Austrian Partition). The modernisation of Sukiennice conducted in 1875-1879 with great panache by a revived town self-government was "a great manifesto of reverence for monuments of the past" and a part of "a virtual laboratory of emerging Polish art-conservation philosophy" (Purchla, 2009, p. 12). The restoration of Sukiennice was an example of reinterpretation of the historical monuments at the time when many existing monuments were adapted to meet new functions. It was assigned the role of both *palais du commerce* and "a temple of the Muses": the first Polish national museum (Purchla, 2005, p. 40) becoming at that time Krakow's *salon*. Nowadays Sukiennice is one of the eleven branches of the Polish biggest national museum hosting a collection of great Polish masters of the Enlightenment, Romanticism, Historicism and Impressionism. The Gallery of Polish 19th-Century Art is located on the first floor of Sukiennice. The ground floor is occupied — according to the tradition of the place and its original purpose — with merchants' stalls, while the underground parts host the Museum of the City of Krakow and its tourist route *Following the Traces of European Identity of Krakow* opened in 2010.

The importance and the potential of Sukiennice (with regard to the scope of the CHCfE project) is three-fold. Firstly, it is located in the heart of the largest

medieval market square in Europe, visited daily by thousands of Krakowians and visitors. Secondly, Sukiennice is part of the area included in the UNESCO World Heritage List already in 1978. And last but not least, the building and its collection have the symbolic value crucial for the Polish identity.

Krakow and the region of Małopolska are well aware of its great potential related to their cultural heritage. The SWOT analysis of the Krakow's Old Town prepared for the city council by BIG-STÄDTEBAU (2008, p. 30) is one of the documents providing arguments for that. Krakow's strengths related to its cultural heritage include its unique historical and cultural values which determine the sense of identity of the residents and at the same time have a decisive impact on the city's image. What is listed among the opportunities is the protection and preservation of cultural heritage. Cultural heritage is included in the strategic documents produced by the municipality and the regional authorities – including the Strategy for the Development of Małopolska Voivedeship for 2011-2022 and the Strategy for the Development of Krakow (2005).

📍 Sukiennice in Krakow

Photo: National Museum
in Krakow



RENOVATION AND MODERNISATION WORKS

The building of Sukiennice, not renovated since the 1960s, ceased to meet the requirements that would allow for a presentation of a valuable collection already in the 1990s. At the beginning of the 21st century the building was in a terrible technical condition: numerous and repeated construction failures, the lack of proper conditions in terms of security and storing of artworks, as well as failures in meeting norms in air-conditioning, ventilation and heating led to a decision to undertake major modernisation works.

Before the modernisation works started, a poll had been conducted to determine which aspects were crucial for the visitors of the museum. This poll, which surveyed a random group of 336 people, showed that although 91% of visitors had a positive opinion about the exhibition, at the same time most of the interviewees indicated the necessity of a functional development of the Gallery in terms of education, recreation and leisure, and commercial activity (81% pointed the need of creating a room for temporary exhibitions, 75.3% a need for an audio-visual room, 80% the necessity of opening the viewing terraces for the public, 54.5% for creating a café). The respondents indicated also the need to broaden the scope of educational activity, introduce computer stations, highlight the entrance to the Gallery, improve the quality of infrastructure (cloakroom, toilets, cashier) and adapt the building to the needs of the disabled and the elderly (Muzeum Narodowe w Krakowie, 2014a).

Taking into consideration the scope of required works, as well as the fact that their cost was decidedly bigger than the funds at the museum's disposal, the institution procured outside means from the Financial Mechanism of the European Economic Area and the Norwegian Financial Mechanism. Thanks to the amount of 8.7 million EUR (5.2 million EUR from Mechanisms, the rest provided by the Ministry of Culture and National Heritage), the building underwent major modernisation in the years 2008-2010. It embraced the entire first floor and the attic of the historic building, as well as the entrance on the ground floor and staircase with a modern elevator that provides access for the disabled. As a result, 3,000 m² of historic space were renovated.

The functional scope of the project involved two areas:

- a part with the same function as before — namely the exhibition space;
- a part that had not been used before or which was given a new function — namely: the modern entrance hall to the museum, where the cultural information point was located, a museum shop, a cloakroom, an elevator for the disabled, a temporary exhibitions room, rooms that improved the working conditions for the staff and new space for the collections (the studio of painting conservation, office spaces for the department of painting and education, rest and refreshment rooms, utility rooms, storage for art works), a multi-function room, mediatheque and multitheque, an education room, a coffee bar with a roof terrace (a space for the first time open to the public), recreation space for visitors, and modern sanitary appliances (Muzeum Narodowe w Krakowie, 2006, pp. 7, 113).

The modernisation required the construction of a new system of central heating, ventilation, air-conditioning, water-sewage system, electric wiring and lighting system, as well as telephone and teletechnical network, security system (an installation of a digital system of monitoring), fire alarms and fire-extinguishing automatic system, as well as audio-visual, multimedia, and Internet networks.

IMPACT ON LABOUR MARKET

As discussed in the previous parts of the report, cultural heritage projects have the potential of creating new jobs, both direct and indirect as well as the induced ones. The direct impact of the project of modernisation was the increase of Sukiennice staff itself from the 24 people hired there before the modernisation (including two guards) to 49 people, including 36 professional employees of the National Museum in Krakow, after the changes. Moreover, there have been 13 jobs created outside the museum (two in an outsourced cleaning company, eight in an outsourced café, and three wardens, Muzeum Narodowe w Krakowie, 2014d). It means that thanks to the modernisation the employment increased by 100%.

📌 **TABLE *2.2.** NEW JOBS CREATED BY THE MODERNISATION PROJECT

JOBS CREATED AFTER THE PROJECT FINALISATION	38
DIRECTLY	25
INDIRECTLY	13
JOBS CREATED DURING THE MODERNISATION PROCESS	40

SOURCE: Muzeum Narodowe w Krakowie, 2014d.

Newly created jobs are of a diverse character. First of all, there are specialists hired for a new education department (previously there was not a dedicated group for education activities, employees from other units were engaged in preparing the educational programme). Second, external firms hired additional staff, which means that thanks to the realised project, apart from the posts in cultural institution, new jobs were provided in the services sector. Based on a literature review presented in the previous parts of the report, it might be assumed that economic effects caused by such investments are not limited to the direct and indirect effects. The impact of a given activity is additionally “multiplied” as a result of the increase in income and the employment in other entities working around the institution.

Apart from posts created after the end of the modernisation, the project generated also jobs in the course of the very investment process. The construction works involved the employment of 40 people: construction workers and conservators of historic monuments. This means that for each post existing before the project started there were 1.66 new full-time jobs created. The investment generated the income for the construction company, i.e. Integer Inc. based in Wrocław, as well as its sub-contractors (the nature of the investment required employing also staff specialising in monuments conservation and new technologies). It might be noted here, however, that the fact the works were performed by a company based in another city produced a leakage of multiplying effects for the local economy.

📍 Gallery of Polish
19th-Century Art,
a branch of the National
Museum in Krakow after
modernisation

PHOTO: National Museum
in Krakow





IMPACT ON SOCIAL CAPITAL

Social capital has been defined by Polish Ministry of Culture and National Heritage as “an ability of the citizens to mobilise and link their resources stemming from trust and the established norms and models of conduct, which favours creativity and enhances the will to collaborate and reach understanding to achieve common goals.” Social trust, or the lack of it, is shaped through the practice of social life and requires among other elements the support of “social infrastructure” (understood as institutions, networks and spaces where these relations can be formed, Ministerstwo Kultury i Dziedzictwa Narodowego, 2013, p. 37).

Cultural heritage institutions, including museums, have the potential to positively influence the fostering of social capital (see also Section 2.5.3). The modernisation project of the Gallery of Polish 19th-Century Art has broadened its potential vis-à-vis social capital especially thanks to the enlarged space that can be used for different purposes, art exhibitions, education activities and meetings. Bearing in the mind increasing numbers of participants and the education activities of the museum, described above, it turns out to be a place of not only learning but also stimulating new encounters and engaging various groups in joint actions — the disabled, the seniors and children. Moreover, facilitating access for seniors and the disabled (a new entrance, a lift) enabled social inclusion for the groups endangered by marginalisation. What is important, is that not only visiting the art gallery can enhance links between the individuals (and after the modernisation the offer of the museum has been enlarged by the temporary exhibitions) but also consuming supplementary services offered by for example gastronomy (Murzyn-Kupisz & Działek, 2013, p. 39). The newly opened café with a summer terrace (so far closed to the public), thanks to which visitors can enjoy a spectacular view over the Main Market Square, is another element of Sukiennice’s contribution to building social capital by offering a meeting place that helps deepen relations between family and friends as well as create the feeling of pride of Krakow’s residents. There is also the potential of enhancing social capital by a special programme for volunteers willing to engage in the work of the museum.

A vivid example of the social bond between the institutions and the residents of Krakow was to be seen during the last days before closing the museum down for renovation. During the last “say-goodbye” weekend (26-27.08.2006) 10,000 people enjoyed the free entrance to the museum and special programmes organised for the public (Bik, 2011, p. 39). Crowds at the entrance proved that the museum had a symbolic meaning for the residents of Krakow and visitors, that they felt attached and considered the museum an important part of their identity.

Educational programmes also contribute to building up social capital. Between 25th of September and 16th of December 2010 the project “Razem w podróży” [Traveling together] was organised with the aim of connecting generations — seniors from an old peoples’ home and children from an orphanage were invited

to participate, both representing disadvantaged groups for family or financial reasons. The final result of the project was a booklet for children related to the permanent exhibition, filled with creative tasks and games, and an accompanying set of drawing and cutting equipment, as well as a specially designed portable chair and a blanket to be used in the space of the museum. The set was offered free of charge to all adults with children, however, according to the original concept, seniors (grandmas, grandpas, aunts, uncles, etc.) coming with children were the main target group. The booklet demonstrates that no prior knowledge in art history is necessary to visit a museum with a child — tasks and activities aim, first of all, at building relations between participants, not necessarily knowledge. During the first workshop, the team consisted of the education department workers and seniors who tried to determine together themes that might be interesting for children and would be included in the booklet (seniors were asked, for example, to think of activities that they usually propose or used to propose to children around them). During the second workshop seniors were playing the role of teachers during the real class with children. Museum staff observed how both groups were building relations and this experience was also used in preparing the booklet.

INCREASING THE QUALITY OF LIFE

The notion of quality of life is commonly used to describe well-being of individuals and societies, however its scientific conceptualisation is quite challenging, since each discipline deals with the problem a little bit differently. According to the World Health Organisation (WHO, 1997), quality of life is an individual's perception of their position in life, in the context of the culture and value systems in which they live, and in relation to their goals, expectations, standards, and concerns. It is a broad-ranging concept, referring in a complex way to the person's physical health, psychological state, level of independence, social relationships and their relationship to salient features of their environment. The *Report by the Stiglitz Commission on the Measurement of Economic Performance and Social Progress* (Stiglitz, et al., 2009) creates also a list of elements which seem to condition the level of quality of life: objective (material standard of living, health, education, leisure and recreation opportunities, social connections, security, political voice and governance, quality of infrastructure and environmental conditions) and subjective well-being (satisfaction derived from life, emotional status, psychological condition). There is a role for cultural heritage to play here, as Blessi et al. (2014) underline the importance of cultural participation for one's well-being; Scitovsky (1976) stresses importance of the simulative function of new activities and spending time creatively; Paszkowski (2011) writes about historic cities being more attractive for people to live in; and Ashworth (1993) argues about historic districts as valuable elements of building psychological stability. Cultural heritage contributes to satisfying cultural and recreational needs of the local community, in terms of entertainment, as well as education

and most importantly: the feeling of belonging. Moreover, it is a vital part of local identity and ties that make up a local community.

Analysing the potential influence of the recently opened Gallery of Polish 19th-Century Art on the quality of life of residents, there are several aspects to be considered. First of all, it is the educational impact already described above. Secondly, it is the broadening of the cultural offer provided by the museum. Although the basic scope of the Gallery's activity remained unchanged (presenting the 19th-century art works), a new display was arranged. Moreover, thanks to the new venue — a temporary exhibitions space — there is a possibility of realising more elements of the programme. In the years 2010-2013, nine temporary exhibitions were organised there. New space for social meetings (the café with summer terrace) cannot be forgotten in this context either. Furthermore, the modernisation project enabled the museum to offer an upgraded venue to other institutions for their events; in the years 2010-2013 they included 34 concerts by Krakow orchestras Capella Cracoviensis and Sinfonietta Cracovia and concerts within the framework of Ludwig van Beethoven Festival, 7 conferences and other events (galas, award events, other such as the closing of the OFF PLUS CAMERA festival, Muzeum Narodowe w Krakowie, 2014e). Last but not least, one could assume, despite the lack of survey data, that the quality of the collection presented in Sukiennice and the fact that it includes the most important works of Polish painters, illustrating the vital events from Polish history and exhibited in an upgraded manner, contribute to fostering Polish national identity and pride.

INCREASING CULTURAL VALUE

It is noteworthy that before the works on the design of the renovation and modernisation began, its concept had been discussed by the Committee of Information and Social Initiatives of the Civic Committee of the Restoration of Monuments of Krakow (which supported the idea of modernisation), and later by a group of experts. Experts' recommendations focused on restoring the spirit of the place from the 19th century, that is from the period when Sukiennice was adapted for hosting an art gallery (in the course of the next 130 years, there was a modernisation period in the 1960s, yet the experts recommended coming back to the appearance resembling the one from the 19th century). The restored elements included the preserved historic polychromes, as well as the use of wood and wrought iron were recommended, to make a reference to the shops on the ground floor.

On a concept level it was decided to both go back in time and recreate the atmosphere and look of the 19th-century gallery by returning to the original wall colours, plush armchairs and sofas, little tables, small Kentia palms and chandeliers, and move forward to explore the technological possibilities of the 21st century with the mediatheque and multitheque.



📍 **Gallery of Polish
19th-Century Art,
a branch of the National
Museum in Krakow after
modernisation**

PHOTO: National Museum
in Krakow

The permanent exhibition itself was prepared with a new scenario. Before the renovation, the main focus of the presentation was put on the most important art works in the collection. The authors of the new concept, Dr. Barbara Ciciora and Dr. Aleksandra Krypczyk, explain that now the attempt is to “present first of all the processes, trends and art movements. And to bring out the main art works only against such a backdrop” (Nowicka, 2010). Curators focused on the latest research on Polish art from 18th and 19th centuries and the contemporary approach to the work from these periods. “The idea of the new exhibition was to emphasise the patriotic and independence characteristics of the collection and to remind visitors about the roots of the museum which was established as a result of a civic movement during the times of Partitions of Poland” (Bik, 2011, p. 79).

CHANGE IN THE ATTENDANCE NUMBERS

Reopening the museum after the modernisation in the middle of 2010 resulted in a noticeable increase in number of visitors. Yet, it needs to be stressed that the Gallery of Polish 19th-Century Art has always been very popular. The lack of detailed data on the type of visitors makes it impossible to unambiguously determine how many of them are residents of Krakow and how many are tour-

ists. Therefore, an analysis of the attendance numbers and their impact on local economy is impossible. However, it is important in this context, that modernisation of the building created a possibility of organising temporary exhibitions, which can translate into more frequent visits of the residents of Krakow who are probably more likely to visit more often different temporary exhibitions than to visit frequently the same permanent exhibition.

Thus, in 2010, there were 80,487 visitors of the Gallery. In 2011 this number doubled, reaching 166,564, while the highest number was noted in 2012: 246,270 visitors (in 2013 there was a slight decrease to 224,403). These data clearly indicate that the major modernisation of Sukiennice had a great impact on its attractiveness for the visitors: the redecorated interior was visited in 2012 by almost eight times more visitors than in the year preceding the modernisation, i.e. 2007 (the modernisation started in 2008, hence the data for that year do not embrace a full twelve months). These numbers are presented in the Figure *24 below.

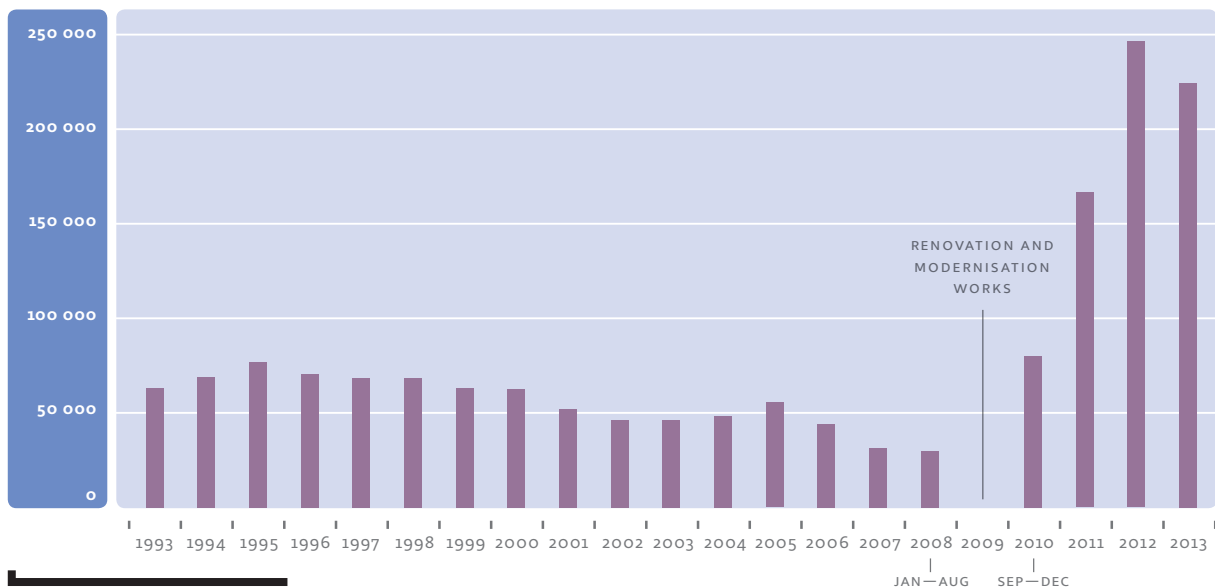


FIGURE *21. ATTENDANCE NUMBERS IN THE GALLERY OF POLISH 19TH-CENTURY ART IN THE YEARS 1993-2013

SOURCE: own, based on data from the Muzeum Narodowe in Krakow (2014).

The attendance in the restored Gallery significantly exceeded the expectations from the stage when the project had been planned. It was assumed that the increase of the visitors would amount to circa 10% every year, i.e.: 57,640 in 2009, 62,880 in 2010, 68,120 in 2011, 73,360 in 2012 and 78,6000 in 2013. In fact, this number was much higher, exceeding the expectation by 330% in 2012.

High number of visitors may, however, be attributed to the newness of the museum — residents of the city were curious and wanted to see the new investment, that was widely promoted in the media campaign. In many cases that might have been a one-time visit.

Sukiennice is among the most often visited attractions of Krakow. Asked about the most interesting places in the city, the visitors mention the Main Market Square, Wawel Castle, Kazimierz quarter, Rynek Underground (a branch of the Historical Museum of the City of Krakow) with permanent exhibition *Following the Traces of European Identity in Krakow* and Sukiennice. In the years 2012 and 2013 Sukiennice was visited by 6.3% and 11.1% of all tourists visiting Krakow respectively and by 5.6% and 11.1% of foreign tourists. Thereby, Sukiennice was fourth on the list of Krakow's most popular attractions in 2012, and fifth in 2013 (Małopolska Organizacja Turystyczna, 2013, p. 102). However, there is no data clearly indicating that when visitors mention Sukiennice as one of Krakow's biggest attractions they actually mean the Gallery of Polish 19th-Century Art (Sukiennice consists of three places that are interesting for visitors: the Gallery, stalls on the ground floor and Rynek Underground museum). One needs to be, therefore, rather careful when referring to these results of the surveys.

INCREASING IMPACT ON EDUCATION AND KNOWLEDGE

Museums may play an important role in a non-formal educational system offering alternative or complementary ways of gaining knowledge and skills. In the case of the Gallery of Polish 19th-Century Art, after the modernisation it underwent a visible upgrade of this function. Before this process education activities in the Gallery were very limited (among the few initiatives there was the publication of four guidebooks for children in the years 2000-2004). Educational programmes took place very rarely — museum lessons were organised 4 times a month, i.e. 48 times a year, while meetings of other type were scarce. After the modernisation, the Gallery significantly increased the number of available lessons and workshops. In comparison to the period before the changes there was a sevenfold increase in this type of events. Moreover, a new branch of education activities was introduced, targeted at people with various disabilities (Muzeum Narodowe w Krakowie, 2014c). Table *3 shows the variety of Sukiennice's offer regarding education.

📌 **TABLE *3.** EDUCATION ACTIVITIES ORGANISED BY THE GALLERY OF POLISH 19TH-CENTURY ART

TYPE OF ACTIVITY	TARGET GROUP	ATTENDANCE NUMBERS
MUSEUM LESSONS	Pre-schoolers	372 lessons: 8,584 participants (2011)
	Primary school pupils	305 lessons: 6,587 participants (2013)
	Secondary school pupils	
WORKSHOPS DURING HOLIDAY TIMES	School children	
INTERGENERATIONAL PROJECTS	Seniors with their grandchildren	

Ⓞ ACTIVITIES FOR THE DISABLED	Children	3 programmes: 123 participants (2011-2013)
	Young adults	
	Adults and seniors (e.g. "Conversations about art" project)	
LECTURES AND PRESENTATIONS ON TOPICS RELATED TO ART		63 lectures: 2,680 participants (2011-2013)

SOURCE: Muzeum Narodowe w Krakowie, 2014c.

Apart from the above-discussed activities, museum organises a number of initiatives for teachers (meetings usually include guided tours in the Gallery as well as presentations of new technologies and the museum's educational offer). The branch also engages in the events of the Night of Museums organised internationally, as well as takes part in the Science Festival in Krakow.

Although the National Museum in Krakow does not assess in any way the level of satisfaction among the participants of programmes to determine whether the classes in the museum contribute to broadening their knowledge, the number of participants in the lectures and museum lessons suggests that there is a wide interest in the museum's educational programme. Education activities run by the Gallery of Polish 19th-Century Art contribute to building human capital and to the education of future consumers of culture; this kind of activity is very important especially regarding the frequently low level of art-related classes in public schools (often as part of other subjects, such as history).

As a museum with a status of a scientific institution, the National Museum in Krakow conducts also extensive research. Thanks to the modernisation project, the Painting and Sculpture Conservation Studio was thoroughly modernised and equipped with special appliances (new purchases include e.g. a low-pressure dubbing table, a conservator microscope, photographic and computer equipment, new furniture and easels and newly installed station blowers), thanks to which it has become one of the most modern studios in Poland. The equipment purchased in the course of these changes allows for broadening this research activity both on theoretical and practical levels. At present, the Painting and Sculpture Conservation Studio manages conservation of 19th-century paintings on display in Sukiennice and those kept in storages. Conservation activities are accompanied by research and scientific analyses, which serve the development of an optimal programme of conservation works. Apart from this research, the Studio runs also complex scientific projects regarding 19th-century artists in collaboration with the Laboratory of Analyses and Non-Intrusive Research of Historic Monuments set at the National Museum in Krakow.

The museum as a scientific institution conducts research concerning its collection and publishes academic journals in the field of conservation and museum studies, among them *Studia i Materiały Naukowe Muzeum Narodowego w Krakowie*

[Scientific studies and materials of the National Museum in Krakow], *Prace Konserwatorskie w Muzeum Narodowym w Krakowie* [Conservation works in the National Museum in Krakow].

IMPACT ON THE IMAGE OF THE PLACE

In the report *Magnetism of Polish Cities*, prepared by BAV Consulting (Young & Rubicam Brands) and Agencja Badawcza KB Pretendent (2009), concerning the strength of brands of Polish cities, the ability to attract tourists, residents and investors was taken as an indicator of the strength of a city brand. The results of the research ranked Krakow the highest, regarding such criteria as tourist attractiveness (defined as ability to attract visitors due to tourist and recreation offer), business attractiveness (investment attractiveness and the relation between qualifications and costs of human resources), comfort of living (friendly city, taking care of its residents), cultural attractiveness (ability to attract people due to cultural offer and cultural infrastructure) and heritage attractiveness (ability to attract visitors due to cultural heritage, monuments and interesting presentations of the history).

Although the research was conducted while the modernisation of the Gallery of Polish 19th-Century Art was still ongoing, it may be assumed that results give an overview of some of the strengths of Krakow's brand in general. The categories used by BAV Consulting mirror some of the most common assumptions and associations of the city, as well. Analysing Sukiennice's potential in this respect, the following arguments may be raised. Sukiennice, as it has already been mentioned, is one of the best recognised and most valuable monuments in the city. The collection presented in its Gallery holds a great artistic and identity value. Its broadened cultural offer contributes, on the other hand, to the "cultural attractiveness." These together contribute also to the "tourist attractiveness." Further analysis of the contribution of Sukiennice to the image of Krakow is unfortunately not possible without a detailed research that would include lengthy qualitative surveys and investigations. The biggest challenge here would be extracting the role of Sukiennice (and even further — the Gallery of Polish 19th-Century Art) in creating this image from the contribution made by the Old Town in general.

The image of Sukiennice itself has not been changed much as a result of the modernisation project. However, thanks to the modernisation, numerous meetings of high profile are organised in Sukiennice with the participation of state leaders, diplomats and representatives of national and regional administration. This contributes to the aims of the project defined by its creators as reinstating Sukiennice as Krakow's *salon*. Together with numerous cultural initiatives, such as film festivals, book promotions or concerts, they reinstate Sukiennice as a prestigious place that hosts important events. It is, of course, not a new image of Sukiennice. However, the modernisation contributed to the upgrading Sukiennice and the Gallery of Polish 19th-Century Art on the list of the most prestigious venues in Krakow.

☛ Muzeum Sztuki
in Łódź — ms²

PHOTO: Muzeum Sztuki/
Łukasz Zbieranowski





ENVIRONMENTAL IMPACT

The modernisation works in the Gallery generated 120 tons of rubble. 30 tons of steel construction elements were changed. 25 ton of new equipment (such as ventilators, engines, air-conditioning) were installed (Bik, 2011, p. 69).

The new Gallery is claimed to be a green one. Attempting to reach modern standards, the Museum introduced a new way of managing thermal and light energy systems. Thanks to a new system of windows and skylights, adequate environment for paintings (in terms of light and temperature) can be maintained depending on the outside weather conditions (for example, there is a new function of the light system that allows automatic turning down the lights). The new light system based on MASTER LEDspot AR111 10-50W source guarantees more than 80% of energy saving compared to halogen light systems. Moreover, the new light system does not emit heat what is of crucial importance for the art works and their lifespan. It also lowers the need of using air-conditioning (lower costs and energy saving). Last but not least, high durability of the Master LED lights and their energy efficiency decrease the cost of electricity (Koninlijke Philips Electronics N.V., 2014).

*2.3

CONVERSION OF THE 19TH-CENTURY FACTORY BUILDING FOR MUZEUM SZTUKI IN ŁÓDŹ

Muzeum Sztuki [Museum of Art] in Łódź holds the biggest and comprehensive collection of modern and contemporary art in Poland, making it a benchmark for newly created museums and centres of contemporary art. Founded in the 1930s, it is one of the oldest museums of contemporary art in the world. The core of the collection was put together by the internationally renowned artist Władysław Strzemiński whose dream was to open a museum of contemporary art. Thanks to his relations with many artists abroad, art works for the museum were collected not only in Poland, but also in France. The so-called International Collection of Modern Art encompassed works by 44 artists, including 33 associated with Paris. In 1931, the collection was formally donated to the city of Łódź. At first it was presented in the town hall, later on, in 1946, the museum was transferred to a new seat — the Maurycy Poznański city palace. During the dynamic history of the museum, its collection has been developed, and plans for acquiring a new seat were made. In 1973, the museum acquired a new building — Herbst Palace — for presentation of art and interiors from 19th and turn of 19th and 20th centuries. In the same year a competition for the concept of a new, proper building for the museum's modern art collection was organised. Although an architect was selected, the project was not realised due to financial cuts. For years the museum suffered from the provisional character

of exhibition space — the palace building was originally conceived as the temporary space. A chance for a new seat appeared in 2004 when the developer of the new commercial centre within the complex of the 19th-century factory in Łódź, French company Apsys, donated one of the historical buildings of the complex to the museum in order to organise the space for permanent collection. A shopping mall, a cinema multiplex, a hotel, various leisure, entertainment and cultural services were opened within the 27-hectare complex called Manufaktura, which was created in historical buildings of the factory.

The factory, owned by Izrael Kalmanowicz Poznański, was once a symbol of the wealth of the city. It was expanding since 1870s, to reach the surface of 270,000 m² in 1899. The French investor opened the commercial-entertainment Manufaktura centre in 2006, and the museum was opened in 2008. The new seat of the museum, within a historical, red brick weaving plant, dubbed ms², houses the collection of 20th- and 21st-century art (3,000 m²) as well as the space for temporary exhibitions (600 m²), while the original seat in Maurycy Poznański palace, named now ms¹, is used as a space for contemporary projects.

The location of ms² plays an important part in the way it functions and for its potential impact. First of all — the city of Łódź. The city which at the turn of the 19th and 20th centuries produced admiration — where migrants flocked to from all over to build their promised land due to the opportunities given by rapid industrialisation — no longer exists. The Łódź of four cultures, Polish, Jewish, German and Russian, disappeared along with the tragic events of the Second World War. The model, post-war, “red” city of spinners and seamstresses does not exist either; the post-communist companies and factories did not survive market competition after 1989 and the consequences of globalisation (the transfer of production mainly to Asian countries). Yet even as the largest city of the region, it suffers from unfavourable demographic tendencies (the decreasing number of citizens, especially those in working and pre-working age, with the simultaneous increase of residents in post-working age, negative population growth and negative balance of migration), high level of unemployment (12.3% in 2013) and the lowest (among the largest cities in Poland) number of economic entities registered in the REGON national registry by the end of the year (Urząd Statystyczny w Łodzi, 2014).

As already mentioned, ms² is situated on the premises of the commercial, entertainment and leisure complex of Manufaktura. By the decision of the conservator of historic monuments of the city of Łódź in 1971, the unique complex of industrial buildings of the former Poznański factory, together with the neighbouring palace, was included in the group of four most precious industrial monuments of Łódź. The area around the factory was indicated in urban planning documents of the city as an area meant for revitalisation. The area development plan for Łódź from 1993 stated that the plot of land was under managed by a special policy designed for areas of special importance for the city’s identity. In this case, there was a requirement of respecting regulations of conservator’s policy on preservation of cultural values of the space of Łódź, as well as getting the permission



📍 **Muzeum Sztuki
in Łódź — ms²**

PHOTO: Muzeum Sztuki/
Piotr Tomczyk

for works of the conservator of historic monuments for the Voivodeship of Łódź (Rada Miejska w Łodzi, 1993). The *Study of the Conditions and Directions for the Spatial Development of Łódź from 2002* (Rada Miejska w Łodzi, 2002), on the other hand, summed up the main rules for the preservation of this area, defined the limits of a possible intervention (the preservation of facades) and imposed the requirement of the conservator's supervision (Hanzl, 2007).

This Manufaktura project allowed for the preservation of historic architecture by offering new functions for the buildings. It combined elements of creating public spaces and developments of public and commercial nature, together with the creation of a group of commercial venues. An important role in initiating the project of Manufaktura was played by institutions that managed the areas of the factory and negotiated the strategy of its restructuring, as well as by state institutions, such as the conservator of historic monuments for the Voivodeship of Łódź, who accepted the final shape of the complex and the scope of conservation works (Hanzl, 2007). The process of modernisation and adaptation of the historic post-industrial building for ms² has to be analysed in the context of a broader investment goals for Manufaktura, since the museum is spatially connected with the whole complex.

Culture and cultural heritage is perceived by the local and regional authorities as one of the vital elements of development. Regional authorities underline that their aim is to create and sustain a region that is “accessible and having

its own cultural and economic identity” (Sejmik Województwa Łódzkiego, 2006). Crucial for this strategy are actions related to the investment in cultural infrastructure: the change of the image of the region into one that would be attractive for potential collaborators, investors and residents by using tourist and cultural values for promotion, the development of tourism, revitalisation of degraded space of the city, both post-industrial and post-military, revalorisation of historic urban groups and historic buildings together with their surroundings and the protection of architecture (including the adaptation of objects related to the region’s history for cultural purposes, Sejmik Województwa Łódzkiego, 2006). One of the pillars of the Integrated Development Strategy for Łódź 2020+ is “society and culture,” understood by the increase in social and cultural capital through the development of education, enhancing the activity of the residents and increasing the level of social participation (Rada Miejska w Łodzi, 2012). Importantly — in reference to the following part of this analysis — Łódź’s experience in revitalisation of post-industrial objects for education and commercial and entertainment purposes is considered one of its main advantages.

MODERNISATION PROCESS

The project entitled “Modernisation and adaptation of the 19th-century post-industrial building for Muzeum Sztuki in Łódź,” run by Muzeum Sztuki in Łódź (managed by both the Ministry of Culture and National Heritage and the Voivodeship of Łódź), was conducted thanks to European structural funds available within the Integrated Regional Operational Programme (2004-2006) (measure 1.4. Development of Tourism and Culture), with the support of the national grant within the framework of the Program Promesa of the Ministry of Culture and National Heritage, which covered part of the museum’s own contribution. The project took place in 2006-2008 and its total cost amounted to 31.1 million PLN (about 7.8 million EUR), including 17.1 million PLN provided by the European Regional Development Fund, 3 million PLN from the Ministry’s subsidy and 11 million PLN contributed by the Voivodeship.

The aim of the project was to adapt the old weaving plant for cultural and educational purposes and to improve the cultural infrastructure and cultural offer of the region. The programme of works included the building’s reconstruction and adaptation for museum purposes, a partial rebuilding of the damaged elements, adaptation of the elements of the surroundings as well as accommodating the building for the use of the disabled (Muzeum Sztuki w Łodzi, 2006). The ms² project can be qualified as part of a model of development called cultural regeneration (Evans & Shaw, 2004, p. 5), which involves e.g. design and construction (or revitalisation) of buildings of public or business use, or programmes promoting the city as a cultural centre, where the spatial redevelopment of a fragment of the city for cultural purposes is to contribute to the regeneration of the closest surroundings.

Taking into consideration the character of the building, the designers decided to emphasise the historic parts of the former weaving plant and at the same time ensure a neutral background for modern art that was to be on display there. Yet, they did not connect the spaces in a smooth way, but contrasted the factory architecture of the building with elements serving a new function. The 19th-century brick walls and ceilings were uncovered, while poles and ceilings in exhibition rooms were covered in plaster to offer pristine white exhibition space. The original form of the new staircase that separates the open space from the exhibition space was also restored. Wood and glass were placed on a steel and self-supporting structure created a dynamic composition, designed as a space for relax during visits to the museum. Noteworthy is also the shape of the all-access zone with a reception desk, bar and bookstore, placed between the two entrance zones located on two different floors. The exhibition space is organised by the structure of the factory hall — a separate design had to be prepared for the permanent exhibition that occupies three most important floors (Orlewicz, 2011).

As a result of the project, the unique collection of art of the 20th and 21st century may now be displayed in a completely new perspective, especially in comparison to the interiors where they had previously been shown. Suffice to say that the permanent exhibition occupies around 3,000 square metres, almost twice as much as in the previous space and that ms² also offers additional rooms for education activities, administration, café, shop and cinema.

INCREASING (IMPROVING) CULTURAL VALUE

The importance of the project regarding the cultural value is at least two-fold. First of all, it is giving a new life to a post-industrial building of historic importance to the city. Being a part of a larger regeneration process, it contributes to promoting industrial heritage of Łódź and increases an aesthetic quality of the place. As a public museum, the building is open to everyone, not only to visitors wishing to see contemporary art but also to everyone willing to see and experience post-industrial heritage from the inside. Accessibility is facilitated by entrance fees lower than in other museums (6 PLN and 3 PLN — discount ticket — in ms², while in other important institutions presenting contemporary art such as the Centre for Contemporary Art Ujazdowski Castle in Warsaw tickets cost 12 PLN/6 PLN, and in the neighbouring museum, the Museum of the City of Łódź, 9 PLN/5 PLN; 1 PLN = 0.25 EUR) with free entrance one day a week.

Moreover, the new venue of the Muzeum Sztuki provides improved conditions for presenting a much larger part of its collection of 20th- and 21st-century art. Before opening the new seat, only 5% of the collection could be exhibited. The limits of space made it necessary to organise exhibitions on a rotating basis. It is not only the number of works of art that can now be presented but also, thanks to the large space, the way the exhibition programme is developed.

📍 **Exhibition space
of the Muzeum Sztuki
in Łódź — ms²**

PHOTO: Muzeum Sztuki/
Piotr Tomczyk

The museum decided not to present the works in a chronological order but to group them according to the themes important for the contemporary culture. Moreover, permanent exhibition of the collection is regularly refreshed, so that visitors are encouraged to revisit the museum to see new works, as well as the same works in different contexts.



CHANGE IN THE ATTENDANCE NUMBERS

The attendance data reflect the changes that happened in the Muzeum Sztuki after 2006 and after November 2008, when the new ms² premises were opened to the public. They prove how well the new museum venue was received by the public, slowly dominating the other branches of the museum. The dropping numbers of visitors in other branches in favour of ms² can be linked with the transfer of a large part of the very popular collection to the new venue. It may, albeit to a limited degree, be speculated that the higher attendance at ms² is a consequence of the building's location at the Manufaktura complex. Of course, not assuming that the clients of the shopping mall automatically visit the museum — one could rather speculate here about the power of promotion activities of the Manufaktura complex and ms² benefiting from it. Table *4 shows

the number of visitors to ms², including those coming in organised groups (it is possible that most of them are school groups, although there is no unambiguous data in this respect; the museum does not collect any data on the profile of the visitors either, Orlewicz, 2011).

TABLE *4. ATTENDANCE AT MUZEUM SZTUKI IN ŁÓDŹ IN THE YEARS 2001–2013

YEAR	TOTAL NUMBER	YEAR	BRANCH OF MUZEUM SZTUKI	TOTAL NUMBER	ORGANISED GROUPS
2001	12 095	2008	ms ¹ + ms ² (opened in November)	22,018	
			Herbst Palace	20,568	
2002	12 088	2009	ms ¹	11,229	432
			ms ²	42,970	4,678
			Herbst Palace	21,603	
2003	12 862	2010	ms ¹	9,865	540
			ms ²	29,706	3,828
			Herbst Palace	21,362	
2004	14 537	2011	ms ¹	12,960	509
			ms ²	51,252	6,686
			Herbst Palace	15,586	
2005	22 957	2012	ms ¹	closed for renovation	
			ms ²	28 764	697
			Herbst Palace (partially closed for renovation)	3,260	
2007	36 460	2013	ms ¹	20,402	3,200
			ms ²	57,970	4,300
			Herbst Palace	31,084	

SOURCE: Muzeum Sztuki w Łodzi, 2014b.

The new premises allow for running an intense programme of temporary exhibitions, education activities, as well as accompanying events, such as meetings, discussions and film screenings. In fact, the project of modernisation had a major impact on the development of the museum's educational offer, especially thanks to the new spaces available. Annually, 10,000 people participate in the events organised at ms² (apart from the exhibitions), so it can be assumed that the project may positively affect the increase of knowledge on contemporary art and culture. The educational projects run by the museum, such as workshops and programmes about modern and contemporary art for children or series of lectures for young adults, seem to play an important part not only in providing participants with certain knowledge but also in developing taste and promoting more open attitudes. In consequence, that may lead to the increase

in cultural capital and to the growth of demand for culture and its creative use. Museums are also important places that develop aesthetic sensibility that impacts one's subjective well-being.

The consistently growing attendance at ms² since 2008 can also reflect the increasing social activity of the citizens of Łódź and their growing interest in participation in culture. This tendency may be linked, in the authors' view, with numerous projects realised by ms² and addressed to the residents of the quarter, such as a social-artistic actions *ms² Re:akcja* and *Jeans Gallery*, or the collaboration with non-governmental organisations and institutions located in the closest vicinity of ms².

Since 2008 the ms² has been running qualitative surveys of the visitors' opinions on its activities. For the period of 2008-2010 detailed data are available that enable comparative analysis of participants' evaluation of the museum's educational offer. Questionnaires were based on eight indicators: fulfilling expectations, value of information, the way of transmitting knowledge, composition of a course, value of accompanying tools, the way courses are conducted, willingness to come back to the course, average rating. The responses to questions most relevant to the issue of the museum's impact are presented in Table *5. The analysis of the surveys clearly indicates great satisfaction of the visitors from the offered programmes. It is best supported with the responses of those who would like to come back to the museum and participate in further educational activities. The participants underline its diversity and adjustment to various groups of visitors (considering their age and education). The education offer addressed to a wide range of viewers translates into the small number of participants coming from groups of random visitors (the decreasing "randomness" of participants), which suggests that the participants consciously select the offer adapted to their needs. It is confirmed by the answers of the interviewees who, asked what attracts them to take part in educational activities in Muzeum Sztuki, usually state that it is the subject matter. The average level of satisfaction for the years 2011-2014 oscillates around 5.1-5.2 (on the scale 1 to 6, Muzeum Sztuki w Łodzi, 2014a).

TABLE *5. EVALUATION OF THE PROGRAMMES RUN BY THE DEPARTMENT OF EDUCATION IN THE MUZEUM SZTUKI BY ADULTS IN SCALE 1-6 (WHERE 6 MEANS 100%, AND 1 — NONE)

INDICATOR	3—31.12.2008	2—31.05.2009	3—29.11.2009	2—31.03.2010
FULLFILLING THE EXPECTATIONS	4.8	5.1	5.1	5.1
WILLINGNESS TO COME BACK TO THE COURSE	not researched	4.9	5.2	5.1
AVERAGE RATING	4.9	5.1	5.2	5.1

SOURCE: Muzeum Sztuki w Łodzi, 2014a.

Additionally, in May and November 2009 and in March 2010 evaluations of the programmes by children were conducted. The rating in this case was higher than that of the programmes for adults: courses were graded between 5.5-5.6 and the willingness to come back: 5.4-5.6.

INCREASING IMPACT ON EDUCATION AND KNOWLEDGE

The education project run by the museum since the opening in the new seat has had a largely experimental character and is very different from conventional programmes offered by various other art museums. Educational events are organised in the frame of participatory education and are based on the education concepts conceived and supported by the Laboratory of Creative Education operating within the Centre of Contemporary Art Ujazdowski Castle in Warsaw. The educator in Muzeum Sztuki plays a role of the facilitator who helps the visitor to achieve the full reception of art. Leszek Karczewski, the head of the education department in the museum, put it in this way: “We do not want to speak about art as such. We aim at the social change. I think that participants of our programmes learn about themselves more than about art itself. Participants are invited to ‘co-think’ about art and creativity and to share their interpretations, what builds up their knowledge” (Jagodzińska, 2013–2014, p. 32).

One of the target groups of the museum are adults. In various formats of programmes they are encouraged to experience contemporary art by participation in unexpected activities and performances. Educators observe change that takes place in the attitudes of participants, e.g. initial stiffness in suits and ties transforming into relaxed crawling on the floor during the workshop (interview with Leszek Karczewski, head of the department of education in Muzeum Sztuki on 27 September 2013 carried out by Katarzyna Jagodzińska for the report, Jagodzińska, 2013–2014). Since the opening of the new seat, the number and variety of educational programmes have been largely increased. Workshops are booked weeks ahead and the department cannot offer more due to the staff capacity, which clearly attests to the museum’s programmes high quality and desirability.

The museum favours an individual approach (pupils, not schools). The example is a series of workshops called “The Square School” conceived for children aged 4–6. Children come individually, not with a school group and participate in classes associated with school subjects: Polish lessons, mathematics, physics, chemistry biology, etc. Each lesson employs special tools and equipment — works of art. The aim is not to supplement the school curriculum, but in reverse — to use the curriculum to analyse works of art (Jagodzińska, 2013–2014, p. 50).

Moreover, the museum as a scientific institution contributes to the development of knowledge by the organisation of research conferences (e.g. *Zagubiona awangarda. Teresa Żarnower i lewica artystyczna* [Lost avant-garde. Teresa Żarnower and the artistic left wing] in 2014) and publication of books, especially in the field of artistic avant-garde.

IMPACT ON SOCIAL CAPITAL AND SOCIAL COHESION

As it has already been discussed in the case of the Gallery of Polish 19th-century Art, the museum may play a part in upgrading social capital. The revitalisation of the historic weaving plant has also had an impact on the creation of social capital. *ms*² provides a brand new space, complementary in a way to the public space created at *Manufaktura* (which in fact serves as one of the most important meeting places or an agora for the residents). It is not only the space of discussion, closely connected with the activities of the museum, but a real meeting space thanks to a coffee house, a bookstore and an arthouse. It should be noted here as well that the enlarged education offer of *ms*² brings together various age groups (children, young adults, adults and seniors, Muzeum Sztuki w Łodzi, 2015) and the adapted building provides access for the disabled who can now participate in the museum programme, which was earlier impossible due to the limitations of architecture of the main building.

Social change is a keyword of the museum's education policy. It has accompanied the museum since the first days of operation in the new seat. *Manufaktura* could be considered as an enclave of wealth addressing its offer to better situated residents of Łódź and tourists, comparing to the nearby enclave of poverty. The museum building shares one wall with a shopping mall, and its outer façade overlooks houses built for the workers of the factory, nowadays, one of city's enclaves of poverty (classified as such in the research conducted in 1998 and 2009 by the Institute of Sociology of the Łódź University; investor of *Manufaktura* did not aim to counteract this situation, Strzelecka, 2011, p. 666). It is definitely a challenging location, says the Deputy Director of the Museum Małgorzata Ludwisiak and the museum's main curator Jarosław Lubiak (Witkowska, 2012), but also a very interesting one with which the museum is trying to work. In 2009 an exhibition or rather a project was mounted which aimed at enhancing the competence of citizens of Łódź and visitors in the perception of modern art through engaging the viewers in the process of creating, collecting, presenting and interpreting. The *ms*³ *Re:akcja* project, during which the exhibition was being created in the presence and with the participation of viewers, was aimed at, as the organisers put it in the promotional materials,

— *integrating disadvantaged groups, excluded from the community of museum guests: neighbours of ms*² — residents of nearby streets (through their social and economic situation) and the customers of the *Manufaktura* (through an ideology of consumption), thanks to the implementation of the idea of a living museum as a space of joint activity (Jagodzińska, 2011, p. 39).

According to Ludwisiak, at that time Deputy Director for Promotion and Education:

— *Every day for the duration of two months, together with kids, seniors, people from community centre and parishioners we were thinking of the museum anew. They were saying what should be included in the museum of modern art, how they conceive art, how an ex-*

hibition should look like. They were editing a weekly with us. Those kids sometimes come round to us through the ramp from Stare Polesie [the district bordering with Manufaktura, the ramp leads from the street level directly to the first floor of the museum, where e.g. museum café is located]. Even if they do not go to the exhibitions, maybe in twenty years one of them will recall the ms³ and will send their kid to us (Słodkowski, 2014).

In 2011 a project called *Urban Ecologies* was launched, in which, by various means of expression — music and movement, performance, action — attention is called to marginal and neglected areas of Łódź, located in the vicinity of the museum seats. The project encompasses the revitalisation of a small square at 6 Wólczańska Street — close to the first seat of the Museum and not far away from Manufaktura — by planting greenery, cleaning the soil, creating a seating zone, building a toilet for dogs and realising artistic programmes there (Jagodzińska, 2011, pp. 39-40).

Referring to various projects based on the concept of social change, Ludwisiak sustains that “the effects of artistic activities are usually not visible and immeasurable” (Ludwisiak, 2014, p. 414), e.g. it is difficult to measure whether 4,000 participants of *Re:akcja* programme became permanent viewers of museum’s exhibitions and for how many people this programme meant a transformation, i.e. what kind of changes (if any) occurred and in what time span such changes might occur (p. 422). It should be remembered, however, that this museum (unlike many others) conducts evaluations of its public.

INCREASING THE QUALITY OF LIFE

The line of analysis concerning the impact of ms² on the quality of life of Łódź’s residents is similar to the one implemented above for the Gallery of Polish 19th-Century Art. Modern and spacious venue of ms² enables the museum to prepare a wider and more interesting offer for the visitors. Being a part of the Manufaktura complex, it complements its entertainment, leisure and cultural offer. One of the world’s largest collections of modern art held by the Museum can also contribute to the residents’ pride of their city.

According to the data from a report on the image of Łódź prepared in the course of the competition for the European Capital of Culture 2016 (Łódź being one of the candidates) by Question Mark Company, 43.1% of the interviewees thought that Łódź was changing for the better. The most important changes indicated by the interviewees related to culture and art (52.1%), academic education (41.5%) and entertainment (41.4%) (2010). Strategic documents and reports about the development of culture and tourism in Łódź indicate Muzeum Sztuki, and especially ms², as the main driving force behind cultural life. An intense exhibition programme at ms², as well as its numerous education and scientific projects, have been noticed by the city residents and, as the aforementioned report indicates, over 12.5% interviewees listed Muzeum Sztuki as the most effective cultural institution in terms of organising cultural events in 2009.

IMPACT ON THE LABOUR MARKET

After ms² had started operating in the renovated building, 37 new posts were created at the museum (this is only the staff employed directly by the museum), 10 of which are employees realising the museum's main programme, 12 are administrative posts, and 15 are jobs created directly in the gallery. Apart from the new posts created permanently in the course of realisation of the project, during the development investment both the general contractor and the sub-contractors hired additional staff (more than initially planned, Muzeum Sztuki w Łodzi, 2014). Hence, the project generated profit for companies from Łódź that worked on the project: the consortium of two companies VARITEX SA and MOSAICON MARIA POTZ — Konserwacja Zabytków. In case of ms², companies performing the construction works were based in Łódź therefore, they supported the local job market and contributed to higher regional income from taxes.

ENVIRONMENTAL IMPACT

As there was no research dedicated to this issue, it is quite difficult to state whether the modernisation and adaptation of the plant had positive or negative impact on the environment. However, as it has been discussed in previous chapters (see Sections 2.5.5 and 3.8.4) of this report, there is evidence that modernisation is more environmentally friendly than demolishing and building a brand new building. The problem of sustainability needs to be addressed here — the use of existing resources, instead of depending on and using up new ones, is one of the characteristics of projects based on revitalisation and adaptation of heritage sites for contemporary function. It is also related to the issue of waste avoidance and preserving embodied energy.

IMPACT ON THE IMAGE OF THE PLACE

Muzeum Sztuki and its activities have at least a two-fold impact of the image of the place. On the one hand, its influence arises from the very nature of a museum which is (apart from the obvious purposes of the museum that, by definition, acquires, conserves, researches, communicates and exhibits heritage) to familiarise with contemporary art and to encourage an increasing number of people to recognise and appreciate it. Therefore, it aims at changing the image and perception of a museum as a place and art as phenomenon important not only for the elite but for a common citizen. On the other hand, the Museum has an influence on the development of a positive image of the city of Łódź.

Muzeum Sztuki realised two promotional campaigns which were to increase knowledge about the museum and raise interest in contemporary art. The first one was conducted at the occasion of the opening of the museum, the second

one was realised in 2013 within the frames of the project *Promotion of a Regional Brand — Muzeum Sztuki in Łódź — Modernity and Tradition*. The latter was also conceived to strengthen the image of Łódź as an important artistic city. The first phase of the project was the outdoor advertisement campaign based on the concept that art consists in asking questions and seeking answers. Members of the Museum's members clubs were invited to become faces of the campaign (six people with various backgrounds and interests). Their portraits were displayed on billboards together with selected works of art as well as their personal views starting with: "Art is...". The answers were for example: "Art is multi-faceted," "Art is a form of relaxation," "Art is breaking the rules." During the Night of Museums in 2013, visitors were asked to fill out the questionnaire about the aesthetic value of the campaign and its effectiveness. The results show that the strongest aspect of the campaign was its authenticity and familiarisation with high art. Billboards and citylight posters were presented in five of the biggest Polish cities. According to AMS Metrics, 83% of residents of those cities had contact with ads at least once (Jasikowska, 2014). It should be noted here that the campaign was not only designed as a means to promote Muzeum Sztuki but it also was a social campaign in which contemporary art was presented as a part of everyday life, something that one should not be afraid of. It means that the impact of the campaign should have had a strong social aspect and its goal was to convince people to appreciate contemporary art itself as well as inform and remind residents of various cities that Łódź has a first class museum of modern art.

Once called the city of 1,000 chimneys, Łódź is now trying to turn its industrial heritage to a new advantage. Although the impact of ms² itself cannot be isolated out of the influence of a number of post-industrial revitalisation and modernisation projects that are being conducted, it seems safe to assume that it does contribute to the general *genius loci* of Łódź celebrating its industrial past. The post-industrial architecture of Łódź has in the recent years stopped being seen as worthless and is gradually becoming appreciated by regional and local authorities and entrepreneurs as an element of a competitive advantage, both on economic and cultural heritage levels. As mentioned in Section 3.8.7 of the report, historic buildings might attract investors who see them as unique and prestigious enough to invest financial resources also in their modernisation. The Manufaktura complex, including ms², with its cultural and commercial activity, attracted for example the owners of Andel's Hotels who used a former textile mill to create its new venue. It is symptomatic that Poland Sotheby's International Realty (a company offering exclusive houses and apartments all over the world) ranked Łódź sixth in its ranking of the Poland's ten most beautiful cities, stating that the city is "a true feast for the lovers of industrial atmosphere. Abandoned factories and brick workers' houses are being slowly turned into luxurious lofts and shops. It is why Łódź, located in the very centre of Poland, is acquiring a unique character" (Gazeta Wyborcza, 2015).

Most of all, however, post-industrial architecture starts being noticed by residents and tourists. As already discussed in the meso level of the report (Section 3.8.1), Kronenberg's research on Łódź shows that most tourists (62.7%) are interested

in industrial heritage (2012, p. 163). The author suggests that most probably this type of heritage requires some kind of “maturity” of visitors, for the surveys he shows that the interest grows with the age of the respondents. According to most residents – over 80% of respondents (p. 165) – cultural heritage is an element that contributes to the attractiveness of the city. Interestingly, even those respondents who were not interested in industrial heritage thought that it had a positive effect on the attractiveness of Łódź (p. 167). The author supposes that it might stem from the fact that the necessity to revitalise post-industrial objects in the city was brought up by the media on many occasions, as well as from the good examples of such investments realised in the city. Manufaktura is one of the most important of such examples and *ms*², at least visually, constitutes an important part of the complex.

*2.4

CONCLUSIONS

The analysis of the modernisation projects of the Gallery of Polish 19th-Century Art in Krakow and *ms*² in Łódź mirrors the challenges faced by researchers interested in the impact of cultural heritage (or those who would like to commission such research including public authorities or cultural institutions), especially in countries or areas where such impact studies are still a novelty. The main challenge of analysing these two cases lies in the lack of necessary data which was collected neither by the museums nor by other bodies, or experts. Therefore, analysis has to be based only on existing research, results of surveys and the data already collected by several institutions. Even institutions that benefited from the EU financial support for cohesion or development (and have filled out application forms that point out expected impacts and results in the fields of economy, society, etc.) do not seem to be sufficiently aware of the importance of the potential impact their projects might have. Consequently, data to verify potential impact are usually not collected. Apart from the lack of awareness, the question of costs and shortages of financial resources (usually cultural institutions would find it problematic to explain the need for them to their formal organisers) hinders cultural institutions from running a monitoring of impact. Therefore, the analysis had to be done based on the scarce data and comparison of the successful projects found in the literature on the subject. This is why some of the conclusions drawn need to be treated with caution.

The other problem faced here is the one of isolating the impact of the projects from their very complex settings. In case of the Gallery of Polish 19th-Century Art, located in the heart of the Krakow’s Old Town, it is rather difficult to say whether the museum alone produces much impact – it is more the whole building of Sukiennice with its three parts, or even the whole complex of the Old Town that in many cases could be analysed as a whole (especially when it comes to discussing tourism). In case of *ms*², extracting the impact of the museum itself from the impact of the revitalisation of Manufaktura proves to be an almost impossible task.

The chosen cases are similar in the sense that both of these institutions are important public museums located in popular locations. The nature of the project, however, was different in each case, with the Gallery of Polish 19th-Century Art renovating its premises and opening some new spaces in the historic building and ms² converting an old plant into a museum of art. They are as different as the cities they are situated in differ from each other: Krakow associated with heritage, culture and national identity, and Łódź, a degraded post-industrial pearl trying to build a new image. What connects them, quite surprisingly one may say, is the attitude of local and regional authorities, which in both cases seem to grow aware of the potential of heritage and culture and try to include them in their strategic documents. This might be a good start for the shift of approach and consequently bringing the full potential of cultural heritage to the fore. What seems to be crucial to speed up this process, however, is the need for deeper and holistic scientific analysis of adequate cases that will prove the thesis that cultural heritage counts for development in its broad sense.

*3

LAUREATES OF THE EU PRIZE FOR CULTURAL HERITAGE/EUROPA NOSTRA AWARDS – ANALYSIS OF IMPACT EVALUATION

*3.1

INTRODUCTION

The aim of the analysis is to examine the attitude of the EU Prize for Cultural Heritage/Europa Nostra Awards winners towards monitoring and evaluating impacts of their awarded projects, focusing particularly on their attempts to assess, monitor and evaluate the impact of their project over time. In doing so it also provides precise examples of the applied methodologies and the results. The analysis, however, does not attempt to assess the impact of receiving the Prize nor of the projects themselves, but rather aims to obtain a general insight into the methodology applied by the laureates.

The study is of particular interest with regard to in the impact of cultural heritage in Europe as the EU Prize for Cultural Heritage/Europa Nostra Awards aims to inspire through the “power of example” and to exchange best practices in the heritage field across Europe (Europa Nostra, 2015). The award-winning projects thus represent the best examples of heritage endeavours and serve as a model for others in the sector. Hence, in regard to the fact that the Prize aims to promote further projects in the heritage field, the study and dissemination of the outputs and impacts of these projects may play an important role in accom-

plishing this goal. The reputation of the Prize and the recognition it provides its laureates can be a help in widely disseminating the multiple effects of cultural heritage to decision-makers as well as to the general public and subsequently raising the overall awareness of the impacts of cultural heritage.

The analysis is based on the results of an online survey conducted among the winners of the Prize and additional in-depth e-mail interviews with the relevant respondents. The aim of the survey was to obtain information on multiple aspects of the projects and their impact assessments, while the e-mail interviews were intended to provide detailed data directly from the respondents, allowing the gaps in the survey results to be filled in. The questionnaire for the online survey consisted of 29 questions: 3 questions addressing the project description, 3 on its nomination for the EU Prize, 18 on the nature of the assessment of its socio-economic impact and finally 5 questions gauging the personal information of the respondents of the survey. Similarly to the research on the meso level, SurveyMonkey, an online tool which allows for the development of customised surveys, was used to collect responses from the Prize winners. In order to obtain a sufficient number of responses, a request for contributing to the survey was sent digitally three times to the prize laureates by Europa Nostra (August-September 2014). At the end of this phase of the research, a total of 69 responses were collected. A thorough review of the responses showed that not all of them were complete or suitable for this study; by the end of the selection, 40 responses were recognised as relevant. In the next stage, e-mails with specific questions were addressed to the selected respondents of the survey in order to collect missing data and to broaden existing information.

The European Union Prize for Cultural Heritage/Europa Nostra Awards complement is the only cultural heritage prize granted on a European level. Established by the European Commission in 2002, it has been operated by Europa Nostra and awarded on a yearly basis. The purpose of the Prize is to highlight some of Europe's best achievements in heritage care, to promote and stimulate the exchange of best practices in the heritage field across Europe and to raise the awareness of the general public on "the beauty and the economic and social value of cultural heritage." Furthermore, the prize aims to encourage future projects concerning heritage throughout Europe (Europa Nostra, 2015).

Every year the committee of the prize honours up to thirty outstanding heritage achievements from all over Europe classified in four categories:

- "Conservation" – refers to outstanding achievements in the adaptation, enhancement and conservation of cultural heritage;
- "Research and Digitisation" – encompasses outstanding research and digitisation projects leading to tangible effects in the conservation and enhancement of cultural heritage in Europe;
- "Dedicated Service by Individuals or Organisations" – encloses contributions by individuals or organisations which demonstrate eminence and rise above the expected outcomes in the given context;

● “Education, Training and Awareness-Raising” — honours exemplary initiatives concerning education, training and awareness-raising in the field of cultural heritage, which promote or contribute to the sustainable development of the environment (Europa Nostra, 2015).

From the 30 nominations in all four categories each year, six are selected as Grand Prix laureates (a seventh Grand Prix was introduced in 2015) and one is granted the Public Choice Award since 2013, chosen through an online poll. The winners in all four categories are selected by specialist juries made up of five to fifteen independent experts who assess the nominated projects and identify the awards. All the winners receive a certificate and a plaque or trophy, while the Grand Prix laureates are given also a prize of 10,000 EUR (Europa Nostra, 2015).

A study on the impact of the Prize, conducted by ECORYS in 2013, shows that it enjoys a high level of visibility and awareness in the sector. Between 2002 and 2012, there were 1,790 entries for the prize, with an average of 180 candidates per year. Most of them were submitted in the “Conservation” category, which might be explained by the fact that this category has been open for a longer period in time (since 1978 when the Europa Nostra Awards, predecessors of the EU Prize for Cultural Heritage/Europa Nostra Awards, were established; whereas categories 2 and 3 were added in 2002 and category 4 in 2008). Moreover, it could be assumed that these types of projects are most common (or most valued) in the sector of cultural heritage.

Submissions from 2002 onwards have been received from 46 countries (including those from outside the EU who are part of the Council of Europe). Spain and the UK have the highest rate of submissions, followed by Germany and Italy; the entries of these four countries account for about half of all the submissions. The prize has been awarded so far to 331 laureates in 36 countries, and in line with the entries, Spain and the UK have the highest number of laureates.

It is the honour and prestige that are considered to be the most important aspect of winning the prize according to the ECORYS study (2013, pp. 36-47). The EU Prize can bring along associated media coverage, which can increase the number of visitors to the site and raise the awareness for the project. In some cases, the Prize can help secure future funding for projects or find support from other organisations and get public donations. Furthermore, it can be a help in boosting careers by strengthening the credibility of the Prize winners and raising the awareness for their work. The financial aspect of the prize is mainly of importance for smaller projects.

*3.2

ANALYSIS OF THE SURVEY RESULTS

Table *5 shows an overview of the EU Prize winners analysed in this report, while Figure *28 provides a visual of the location of the selected 40 projects within the European Union.

📌 **TABLE *5.** OVERVIEW OF THE EU PRIZE WINNERS SELECTED FOR THE ANALYSIS

NAME OF THE PROJECT	YEAR OF SUBMISSION FOR THE EU PRIZE	COUNTRY	CATEGORY OF SUBMISSION
LARCHILL ARCADIAN GARDEN	2002	Ireland	Conservation
MONUMENTENWACHT	2003	The Netherlands	Dedicated Service
VARUSSCHLACHT IM OSNABRÜCKER LAND – MUSEUM UND PARK KALKRIESE	2004	Germany	Conservation
THE ATLANTIC WALL LINEAR MUSEUM	2005	Italy	Research
TER DOEST ABBEY BARN IN LISSEWEGE	2005	Belgium	Conservation
HEATHER AND HILLFORTS LANDSCAPE PARTNERSHIP	2005	United Kingdom	Conservation
ST PAUL'S BRISTOL, CIRCOMEDIA	2006	United Kingdom	Conservation
THE BELVEDERE ON PFINGSTBERG IN POTSDAM	2006	Germany	Conservation
FARBDAARCHIV ZUR WAND- UND DECKENMALEREI	2006	Germany	Conservation
LOGIE SCHOOLHOUSE	2008	United Kingdom	Conservation
VAN NELLE FACTORY	2008	The Netherlands	Conservation
RESTORATION OF THE SEGOVIA MINT	2009	Spain	Dedicated Service
MAISON DU PATRIMOINE MÉDIÉVAL MOSAN	2009	Belgium	Education
4 GRADA DRAGODID	2010	Croatia	Education
THE SARCOPHAGI OF THE DUKES OF POMERANIA	2010	Germany	Conservation
REHABILITATION OF A FORMER FOUNDRY IN MULHOUSE	2010	France	Conservation
THATCHING IN WEST EUROPE FROM ASTURIAS TO ICELAND	2010	Spain, United Kingdom, Ireland, Germany, The Netherlands, France, Italy, Scandinavia	Research
HISTORIC BUILDING CONSERVATION TRAINING PROGRAMMES	2011	United Kingdom	Education
NEW APPROACHES TO THE CONSERVATION OF FURNITURE IN BOULLE-TECHNIQUE	2011	Germany	Conservation

RESTORATION OF THE “SECOND TEMPLE CYCLE” (1928)	2011	Germany	Conservation
FESTETICH CASTLE	2012	Hungary	Conservation
RESTORATION STUDY FOR THE NOLLA PALACE, MELIANA	2012	Spain	Research
IRISH WALLED TOWNS NETWORK EDUCATIONAL PROGRAMME	2012	Ireland	Education
NUMBER 2 BLAST FURNACE, SAGUNTO	2012	Spain	Conservation
THE WATERSHED LANDSCAPE PROJECT	2012	United Kingdom	Education
ROMÁNICO NORTE – ROMANESQUE NORTH	2012	Spain	Conservation
THE LIVING CABANYAL ARCHIVE	2012	Spain	Education
RESTAURATION OF LA FUENTE DE LOS LEONES	2013	Spain	Conservation
LYCEUM PASSOS MANUEL	2013	Portugal	Conservation
IUBILANTES ASSOCIATION	2013	Italy	Dedicated Service
“SOS AZULEJO” PROJECT	2013	Portugal	Education
GRANARIES ON STILTS: THE ANCIENT ART OF BUILDING WITH NATURE	2013	Spain	Research
A NEW FUTURE FOR THE RAILWAY BRIDGES OF THE LANGSTRAAT	2013	The Netherlands	Conservation
ROMAN VAULTED CONSTRUCTION IN THE PELOPONNESE	2013	Greece	Research
THE COEN CASE WESTFRIES MUSEUM	2013	The Netherlands	Education
KEMPENS LANDSCHAP	2014	Belgium	Dedicated Service
GUSTAV KLIMT MEMORIAL SOCIETY – KLIMT’S LAST STUDIO	2014	Austria	Dedicated Service
BIBLIOTECA BARDENSIS	2014	Germany	Conservation
“PASSAGE FROM A RUSTY CITY TO A NEW MISKOLC”	2014	Hungary	Education
RESTORATION AND TECHNOLOGIC ADAPTATION OF TEATRO SOCIALE IN BERGAMO	2014	Italy	Conservation

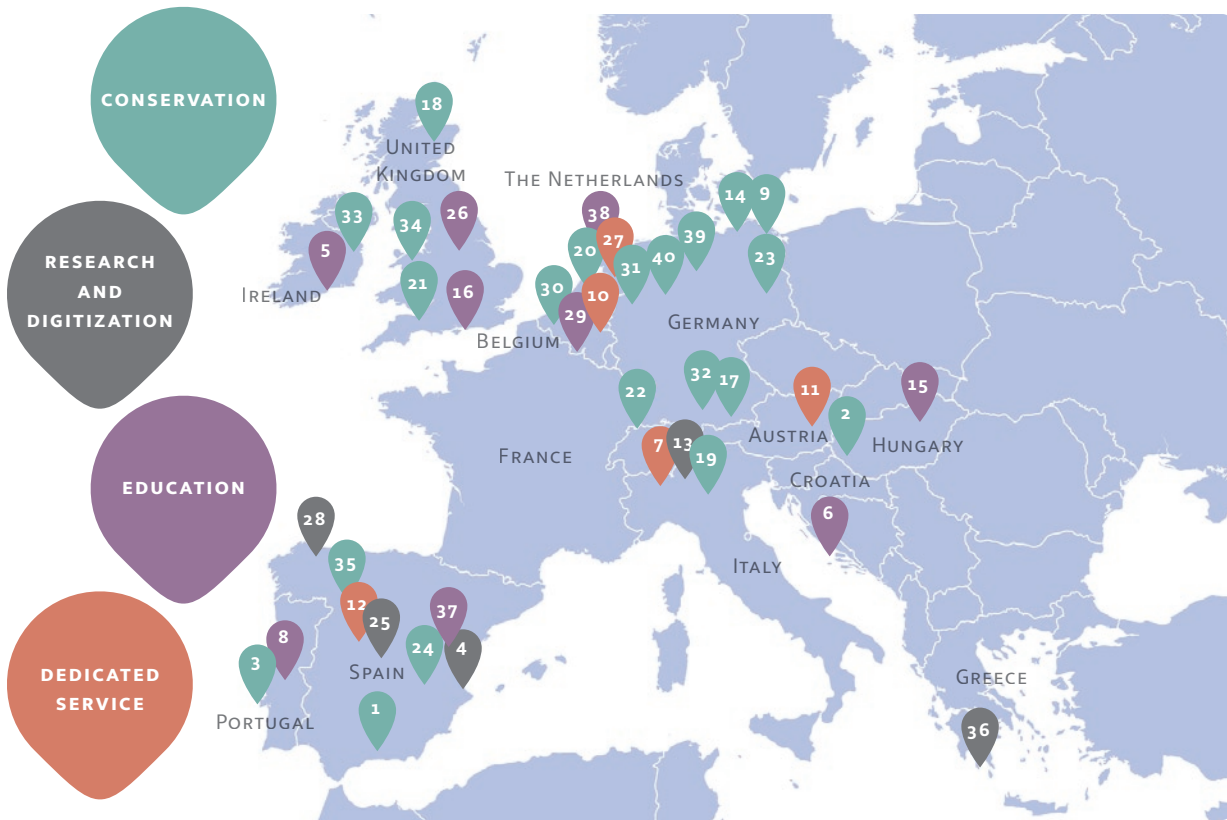


FIGURE *22. LOCATIONS OF THE PROJECTS SELECTED FOR THE ANALYSIS

SOURCE: OWN.

The question that interested the authors the most when conducting the survey and preparing the analysis was whether the winners of the Prize had undertaken any effort to evaluate the impact of their winning project on the economy, society, culture and environment. The results of the survey show that an overwhelming majority (65%) of them have not been evaluating the projects in terms of their impacts, while only one third of the respondents claimed to have carried out any attempt in this regard.

ANALYSIS OF THE RESPONSES FOR PROJECTS HAVING IMPACT ASSESSMENT

Table *6 provides detailed information on these fourteen projects whose impact was one way or another evaluated by their organisers. ↻

📌 **TABLE *6.** EVALUATIONS UNDERTAKEN BY THE ORGANISERS OF THE EU PRIZE WINNING PROJECTS

NAME OF THE PROJECT	NUMBER OF EVALUATIONS WHICH HAVE TAKEN PLACE	METHODOLOGY	EVALUATED DOMAINS OF IMPACT
FESTETICH CASTLE	1	Quantitative and qualitative data analysis	Economic Social
GUSTAV KLIMT MEMORIAL SOCIETY – KLIMT'S LAST STUDIO	More than 5	Analysis of qualitative and quantitative data: publicity of the project and site, number of visitors etc.	Economic Social Cultural Environmental
HEATHER AND HILLFORTS LANDSCAPE PARTNERSHIP	2	Participants and surrounding communities survey and anecdotal information (quantitative and qualitative)	Social Cultural Environmental
HISTORIC BUILDING CONSERVATION TRAINING PROGRAMMES	More than 5	Participants survey	Economic Cultural
IRISH WALLED TOWNS NETWORK EDUCATIONAL PROGRAMME	More than 5	Analysis of quantitative and qualitative data	Economic Social Cultural
IUBILANTES ASSOCIATION	1	Qualitative data analysis	Cultural Environmental
KEMPENS LANDSCHAP	1	Qualitative data analysis	Cultural Environmental
“PASSAGE FROM A RUSTY CITY TO A NEW MISKOLC”	1	Participants survey	Social Cultural
“SOS AZULEJO” PROJECT	4	Quantitative analysis of statistic data	Economic Social Cultural
RESTORATION OF THE SEGOVIA MINT	1	Desk analysis of qualitative data	Social Cultural
THE LIVING CABANYAL ARCHIVE	More than 5	Quantitative and qualitative analysis of citizen participation and publicity of the project in social media and on the website	Economic Social Cultural Environmental
THE WATERSHED LANDSCAPE PROJECT	1	Participants survey and interviews and analysis of statistical data	Economic Social Cultural Environmental

<p>① VAN NELLE FACTORY</p>	1	Quantitative and qualitative, no further information	Economic Social Cultural
<p>VARUSSCHLACHT IM OSNABRÜCKER LAND – MUSEUM UND PARK KALKRIESE</p>	2	Quantitative evaluation	Economic

SOURCE: OWN.

The survey results show that the organisers of the EU Prize winning projects either used qualitative participatory methods to assess the impact or relied on a combination of both qualitative and quantitative methods. Only a small percentage of respondents admitted to have employed only analysis of quantitative data.

As argued in the meso level of analysis of this report, the best studies are based on a combination of quantitative as well as qualitative non-participatory and/or participatory methods; as relying on different methodologies, the particular shortcomings or blind spots of each of the methods can possibly be offset.



① **FIGURE *23.** METHODS APPLIED FOR THE IMPACT ASSESSMENTS OF THE COLLECTED PROJECTS (N=14)

SOURCE: OWN.

DIVERSITY OF METHODOLOGICAL APPROACHES

Having analysed the collected answers resulting from this work, it becomes clear that the methodologies of the impact assessments employed by the respondents reveal a significant diversity in the approach used: group interviews, telephone interviews, analysis of statistical data, analysis of social networks, questionnaires and evaluation sheets were mentioned in the responses of the survey. To show this diversity of approaches three projects: Varusschlacht im Osnabrücker Land – Museum und Park in Kalkriese, Germany (2004); the “Passage: from a Rusty City to a New Miskolc” project from Hungary (2014) and the Heather and Hillforts Landscape Partnership Scheme from the UK (2005) were chosen to be presented here.

A project relying merely on the analysis of quantitative data to assess its economic impact is the Varusschlacht im Osnabrücker Land – Museum und Park in Kalkriese, Germany. This project won the prize on the account of its “innovative interpretation of an ancient battlefield – which commemorates a decisive event

in European history — and for the deciphering and presentation of the scant remains by interdisciplinary scientific research” (Europa Nostra, 2015). Economic impact assessments of the project have been carried out in 2007 and 2009 based on quantitative indicators such as yearly revenues and numbers of visitors. They indicated that, even though the museum had attracted more than half a million visitors since its opening in 2002, the revenues from visitors covered only 40% of the annual costs. This impact assessment led to important implications related to the future management of the museum, as its results meant that the economic situation would be one of the main challenges of the project if it was intended to maintain its scientific research, interdisciplinary philosophy and quality standards in the future (The Best in Heritage, 2006).

The organisers of the “Passage from a Rusty City to a New Miskolc” project conducted an impact estimation based on qualitative data. The project aimed to improve the preservation, recognition and revitalisation of the built heritage of Miskolc, a city in north-east Hungary. This could, in turn, contribute to promoting a new sense of urban identity and possibly prevent the large-scale emigration of younger people, so that the city can be re-valued and re-integrated into a new sense of self-esteem in the present. Miskolc is a Hungarian city with a proud history dating back to the medieval times, succeeded by a period of great prosperity from the 1930s onwards, but with severe decline in the 1990s due to a new political regime and a sharp industrial crisis. The goal was to revive the city’s history by the identification and recording of oral history, the making of short films, the collection of artefacts and the compilation of archives. An impact assessment of the project was conducted in 2014, based on qualitative data. Group interviews and face-to-face questionnaires were used to measure its impact on community participation and the creation of a positive image of the area. The indicators that were assessed included the participants’ motivation, their awareness of local community problems and their personal willingness to change. The results of this impact assessment have not yet been analysed entirely, but they already indicate that the project is of high social value for Miskolc’s community (information obtained from E. Mató, project manager of the North-East Passage Cultural and Academic Association).

Finally, it is the Heather and Hillforts Landscape Partnership Scheme from the UK that employed both quantitative and qualitative data to assess its impact. The project aimed to conserve and maintain the heritage of the Heather and Hillforts moorland.

It wanted to reconnect people to the uplands and increase their enjoyment of them through interpretation, education and special events. The result was a series of initiatives to conserve the hillforts, restore the moorland, improve access to the sites and raise understanding of a landscape visited by more than half a million people every year — many of them completely unaware of the natural and historic significance of their destination. (Clwydian Range and Dee Valley, 2015)

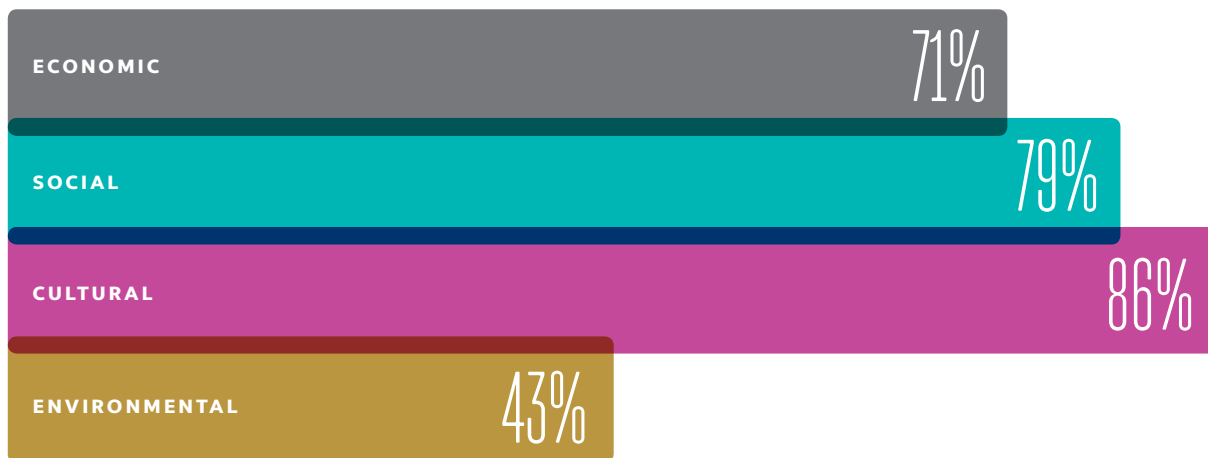
Qualitative research was conducted using questionnaires, which were applied to assess the impact of the project on its participants and the local communities.

The surveys were set up at the outset as well as at the end of the project and inquired in particular about public participation and community engagement. The results of the questionnaire indicate clearly the importance of the area for the local inhabitants: 81% of the respondents felt that it was important to conserve the heritage of the uplands and 77% acknowledged the importance of an increased amount of education initiatives tackling local heritage. The economic impact of the project was furthermore estimated based on available statistical data, but the results of this research have not been disseminated (Heather and Hillforts Landscape Partnership Scheme, 2010).

Organisers took various approaches towards the assessment of potential impacts of their project – some performed one-time analysis, whereas others decided to make a cyclical evaluation, most probably to see the change of trend over time. Those who chose the second approach claim that the same sets of indicators are used in each of the evaluation exercise. Frequency of evaluation in the selected projects ranges from every ten years to, in the context of special events, every year or even multiple times per year. In the Heather and Hillforts project a qualitative assessment, in the form of a questionnaire, of the social impact was conducted at the onset and the outset of the project. This allowed the researchers to assess the change of social situations over a five-year period.

FOUR DOMAINS APPROACH IN IMPACT ASSESSMENTS

In accordance with the four pillar approach described in detail in the macro and meso levels of the report, the respondents of the survey were asked about the domains and subdomains of impact that they evaluated. As illustrated by Figure *5.30, the environmental impact of the projects is assessed less often (6 projects) than the other impact domains. This confirms the general trend in the European research on cultural heritage impact presented earlier. Most of the assessments



📊 **FIGURE *24.** THE IMPACT DOMAINS CLAIMED TO BE EVALUATED BY THE RESPONDENTS OF THE SURVEY (N=16)

SOURCE: OWN.

focus on the following subdomains: educational impact, impact on tourism, social inclusion, creation of a positive image and impact on the townscape.

This might be illustrated with examples of projects whose impact on all economic, social cultural and/or environmental levels has been subject to an evaluation. As exemplary initiatives having impact in all four domains, the following projects will be presented here: Watershed Landscape Project, Irish Walled Towns Network, “SOS Azulejos” project, The Living Cabanyal Archive and Historic Building Conservation Training Programmes, the aforementioned Heather and Hillforts Landscape Partnership Scheme, and finally, Klimt’s Last Studio.

South Pennines Watershed Landscape Project, a three year initiative, was set up in April 2010 as a part of the Heritage Lottery Fund’s National Landscape Partnership programme in the UK. Its organisers have conducted several socio-economic impact assessments throughout the course of the project’s duration.

The Watershed landscape covers an area of 350 square kilometres in the South Pennines in Northern England and includes Scheduled Ancient Monuments, Special Protection Area (European Birds Directive), Sites of Special Scientific Interest and Local Geological Sites. The aim of the project was to bring about the regeneration of the South Pennines through tourism and recreational development and establish the South Pennines as a model of sustainable land management. Pennine Prospects, the collective term of all partner organisations involved in the project, including the local authorities, national agencies, utility companies, the National Farmers Union and the voluntary sector, commissioned the Resources for Change consultancy to carry out a project evaluation to ensure the impacts of the Watershed Landscape Project were properly captured. To assess the impacts of the project on individuals and the local communities, Kate Measures Consulting was appointed. The evaluation of the project impact consisted of three large parts, which were conducted at both the midpoint and the end of the project: structured interviews with partners and stakeholders, a review of the engagement work and the collection and analysis of data by the project team.

To evaluate the influence of the project on people (including volunteers, apprentices, community groups, local businesses, local residents and visitors to the area), existing data as well as new data on the impact were gathered. The examination of the existing data concerned visitor questionnaires, participant evaluation forms, school workshop evaluations, volunteer involvement records, proactive e-mail feedback and project newsletters. New data on the impact on society were gathered through telephone interviews (of teachers, apprentices, volunteers, community groups and local farmers), face-to-face as well as online surveys (with visitors, local residents, teachers and volunteers) and the study of web and social media activity (Pennine Prospects, 2009).

The results of the impact assessment of the South Pennines Watershed Landscape Project on the society were four-fold: the awareness of the landscape and the many facets of its heritage had been significantly increased, barriers of access had been removed, investments in development of various skills had been made, and a great number of people had been more deeply engaged with the

landscape. Another achievement of the project consisted in emphasising the unique heritage of the area and in outlining ways to engage with it. The analysis of the results of the project indicate that it has helped people to recognise the heritage which is right at their doorstep and to become more involved in it. Furthermore, the project has improved the intellectual, physical, emotional, cultural and financial access to the landscape and invested in the development of specialist skills, such as archaeological surveying, botanical identification skills and oral history recording and editing, of project staff, contractors and suppliers, trainees, volunteers, community organisations, pupils and visitors through the availability of training opportunities during the course of the whole project. Finally, 59% of the visitors acknowledged that work done as part of the Watershed Landscape Project had increased their knowledge on the landscape or the places within it. Moreover, many said that the project had altered the way that they thought about it or changed the way they used the landscape.

The impact assessment has demonstrated that the South Pennines Watershed Landscape Project will leave its mark, not only by the physical improvements which were made within its framework, but also through the reinforcement of local community engagement. The project delivers in the context of physical enhancements, but also building capital and wide social and economic benefits (Pennine Prospects, 2009).

The second project to be described is the Irish Walled Towns Network (IWNT) Educational Programme, established in 2005 by the Heritage Council in Ireland. The network was created with the aim to unite and to manage the strategic efforts of local authorities committed to the conservation and the enhancement of historic walled towns in Ireland. There are currently 23 member towns and villages throughout Ireland. The steering committee of the network (made up of representatives from the Department of Arts, Heritage and the Gaeltacht, the Northern Ireland Environment Agency, the Heritage Council and several member towns) devised an educational programme in 2011 to focus on conservation, planning and town centre economy, heritage tourism and community group development. In the framework of this programme, various lectures, seminars and workshops have been organised by lecturers and students of three Irish universities working in and with member towns.

To analyse the impact of the IWNT project, an impact assessment has been carried out every year since 2009. The indicators employed for this assessment were the following: responses in the form of post-course feedback forms, number of membership towns, amount of visitors attending the Walled Towns Days and the supporting activities of towns in relation to conservation works on the walls. A baseline study has been conducted in Cork with the aim to provide a measurable index which will allow for the precise analysis of the impact of the project in the future. Up until now, not enough time has elapsed to measure the precise impact of the project regarding the public perception or awareness of town walls.

The impact assessment of the educational branch of the IWNT project, based on the four indicators mentioned above, indicates that so far, the project has

had a considerable impact on its surrounding communities. The results of the post-course feedback forms have been outstanding and 600 people, representatives of all member towns, have participated in 26 of the organised training events. This has improved the interaction between the member towns and the IWTN significantly. Secondly, the number of member towns of the IWNT has grown from 21 to 27 towns. Furthermore, between 2011 and 2013, 110,000 people attended the Walled Towns Days, which means that the attendance figures for the Walled Towns Days have increased. Feedback surveys by visitors, moreover, have provided excellent feedback on the event, with almost 90% of the respondents reporting that they would recommend the Festival to a friend. Finally, multiple town and county councils have made an effort to support conservation work on places where reduced allocations had occurred due to the economic crisis. This illustrates the overall acknowledgement of the walls as a crucial element of the towns' heritage (The Heritage Council, 2014).

The "SOS Azulejos" project in Portugal has been subject of an impact assessment, used as a monitoring tool to observe the changes in the effects of the project every year. The project was set up in 2007 in the context of an increase of burglary and traffic of Portuguese historic and artistic tiles (*azulejos*). The project is managed by the partnership of seven Portuguese institutions, including police forces, institutions from the Ministries of Culture and Education and the Municipalities Association. The project was implemented by providing online information and identifiable photographs of the stolen tile panels. The aim of it is to decrease the theft rate of these tiles by hampering the circulation of the tiles on the market and by facilitating the identification and recovery of stolen *azulejos*. Furthermore, the project provides practical advice on theft, vandalism and conservation care in the context of preventive conservation and crime prevention and encourages educational activities concerning the protection of historic tiles.

The impact assessment of the "SOS Azulejos" project in Portugal has so far been conducted four times; each year since 2010. The assessment relies on quantitative data, i.e. the number of registered thefts of historic and artistic *azulejos*, which is then compared with data from previous years. The educational impact of the project is more difficult to measure and has not yet been used as an indicator (data obtained from Leonor Sá, coordinator of the "SOS Azulejos" project).

The results of the "SOS Azulejos" project indicate that the registered thefts have been reduced by 80% since the start of the project in 2007. Moreover, new regulations regarding the prevention of demolition of tile-covered façades are being implemented in Lisbon, which illustrates how the project has enhanced the general support and awareness for this type of cultural heritage. Finally, buildings with important tile collections have now also been protected. The project aims to decrease the number of registered thefts by 100% in the future (Sá, 2012, pp. 4-10).

The aim of the project of The Living Cabanyal Archive in Spain was to protect the endangered neighbourhood of El Cabanyal in the city of Valencia, which was proclaimed as a Cultural Interest Property in 1993 under the category of

Historic Quarter. The neighbourhood has been threatened since 1998 by a municipal project of extension of the Blasco Ibáñez Avenue to the sea through the middle of the neighbourhood. This would lead to the destruction of a set of historic buildings. The project was launched in 1998 by various involved stakeholders (cultural organisations, inhabitants, tradesmen and political opposition) who created a platform “Salvem El Cabanyal,” which has been taken action up until now to prevent the expansion of the avenue by organising events, such as public dinners or writing petitions against the plan of the local government (Plataforma salvem El Cabanya, 2013).

The impact assessment of the project of the Living Cabanyal Archive has been conducted more than 5 times since 2002 and relied on both qualitative and quantitative data. The increase in followers in social networks, guided visits to the neighbourhood and the use of technological geolocation support are used as indicators of the impact. By analysing the participation of citizens in the project, the role of it in social networks and the popularity of the project website, the impact of the project on an economic, social, cultural as well as environmental level is estimated (Plataforma salvem El Cabanya, 2013; data obtained from Lupe Frigols, Director of The Living Cabanyal Archive).

The socio-economic impact assessments of the Living Cabanyal Archive have had a considerable influence on the further management of the project. During the past 16 years the initiative has defended the conservation and revitalisation of the Cabanyal neighbourhood through a series of outstanding actions and campaigns. The impact assessments of the project have indicated that the initiative has contributed significantly to social cohesion, as illustrated through the increased community participation in the project, and to the local and international awareness of the cultural heritage of the neighbourhood, visible in the increased occurrence of the project in social networks and the augmented number of visitors of the project website. Overall, it can be stated that the project can serve as a model for other places in a similar situation, as it is a citizens’ initiative with the goal to raise awareness on the historic environment of Valencia by promoting sustainable town-planning through cultural identity and participation.

Even though the results concerning the preservation and renovation of the neighbourhood are positive, impact assessment has pointed out that the degradation of the area continues as the project is still being ignored by several government institutions. Therefore, a campaign was set up in July 2014 by the Cabanyal associations to present allegations to the City Council of Valencia to stop the destructive endeavour, which has in the meantime been approved by the Council members (Plataforma salvem El Cabanya, 2013).

A yearly impact assessment of the Historic Building Conservation Training Programmes project enables constant improvement of the project itself. It was set up by the Weald and Downland Open Air Museum in West Sussex in the south of the UK by creating a centre for training in historic building conservation. The programme is open to the general public and provides an inspirational learning environment for the next generation of skilled personnel for historic building

conservation. Noteworthy is that the project has been conducting impact assessments every year since its set up. Evaluation sheets are given to all participants of the training programmes; they contain specific questions on participants' expectations and learning experiences acquired during the project. The data from the evaluation sheets are collated every year and are considered during the preparation of the next training edition, as a learned lesson to continue improving the programme. Overall, previous students find that the project has enhanced their knowledge, skills and learning power (information obtained from Diana Rowsell, Head of Learning of the Weald & Downland Open Air Museum).

The results of the questionnaire on the aforementioned Heather and Hillforts Landscape Partnership Scheme indicate clearly the importance of the area for the local inhabitants: 81% of the respondents felt that it was important to conserve the heritage of the uplands and 77% acknowledged the importance of an increased number of education initiatives related to local heritage. Furthermore, respondents' comments on the survey demonstrate how they feel the heritage enriches the quality of their lives: "I have always loved history and seeing evidence of the past gives me a feeling of belonging here and continuity between past and present," "I adore looking at this beautiful area, from many vantage points in and around Buckley. It is an utter tragedy that so many people are totally disinterested in this wonderful place of our heritage" and "This is one of the more attractive areas in the UK, a whole variety of landscapes available to walkers with a multitude of interesting sites as well..."

The open rural nature of the heritage site encourages people to walk and leave behind the pressures of modern-day life. This recreational use of the landscape as a hiking area has been proven to have particular health benefits, by lowering the chances on heart diseases, reducing depressions and stimulating weight loss. The project also demonstrated to have a certain impact on education as the hillfort sites are frequently visited by schools from the vicinity and the project area is used for educational out-of-classroom activities for children staying at the Colomendy Outdoor Centre (owned by Liverpool County Council) and Bryntysilio (owned by Walsall County Council). It is also used by young people following Bronze and Silver standards of the Duke of Edinburgh Award Scheme. Moreover, the project area proved to be a valuable resource for informal education as well: archaeology study events and training days in moorland managing techniques are being organised in the area.

The analysis of the statistical data on the economic impact of the project furthermore indicated that the county of Denbighshire (where the project is located) attracted 1 million staying visitors and 3.5 million day visitors in 2001, accounting for about 182 million GBP of revenue for the county. The indirect and direct visitor spending accounted for an estimated 4.255 full time jobs. Rural areas in the county, such as the Heather and Hillforts area, were responsible for 42% of these day visitors and their spending and for 26% of the staying visitors and 31% of their expenses (Heather and Hillforts Landscape Partnership Scheme, 2010, p. 48; English Heritage, 2004, p. 14).

Another example where the impact assessment has led to benefits concerning the future of the project is the Gustav Klimt Memorial Society — Klimt's Last Studio. The Klimt Society has conducted a 14-year long campaign to persuade the Austrian government to preserve Klimt Villa and Garden, the last residence of Gustav Klimt, one of Austria's greatest painters, as a public property for the general public to enjoy. To achieve this aim, the society's volunteers have been giving guided tours and organising several cultural events. The impact of the project has been assessed every year since the setup of the project in 1999, based on qualitative and quantitative data, such as the publicity in the media, the number of visitors of the website as well as the number of visitors and the number of events organised at Klimt Villa. The results indicate that the Gustav Klimt Memorial Society has anchored Klimt's Last Studio in the public consciousness, supplementing and extending the artist's special reputation. Due to these positive results, Klimt Villa received the National Monument Status from the Republic of Austria in 2009 and was authentically restored and officially opened on September 30, 2012. The society is partner to the Klimt Villa/Studio Managing Organisation and is retained as a source of expert opinion and a partner to all the responsible authorities (Gustav Klimt Society, 2013).

INFORMAL EVALUATION: ANALYSIS OF THE RESPONSES FOR PROJECTS WITHOUT IMPACT ASSESSMENT

In the second part of the survey, the organisers of projects that have not gone through an impact assessment were asked to complete an informal evaluation on the impacts of the project, based on their own opinions about the potential effects of their initiatives. Table *7 provides a list of these projects, together with the information relating to the respondent's own opinion on their project's impact, or lack thereof, and on the level at which this impact would be situated.

📌 **TABLE *7.** ANSWERS TO THE SURVEY PROVIDED BY ORGANISERS OF THE WINNING PROJECTS WHO DID NOT CONDUCT FORMAL EVALUATION OF IMPACT

NAME OF THE PROJECT	DO YOU ASSUME THAT THE PROJECT HAS GENERATED A CONSIDERABLE IMPACT?	ON WHICH DOMAIN DO YOU THINK THIS IMPACT IS SITUATED?
4 GRADA DRAGODID	Yes	Economic Social Cultural Environmental
A NEW FUTURE FOR THE RAILWAY BRIDGES OF THE LANGSTRAAT	Yes	Economic Social Cultural Environmental

BIBLIOTECA BARDENSIS	Yes	Cultural
FARBDAARCHIV ZUR WAND- UND DECKENMALEREI	No	
GRANARIES ON STILTS: THE ANCIENT ART OF BUILDING WITH NATURE	Yes	Social Cultural
LARCHILL ARCADIAN GARDEN	Yes	Cultural
LOGIE SCHOOLHOUSE	Yes	Cultural
LYCEUM PASSOS MANUEL	Yes	Social Cultural Environmental
MAISON DU PATRIMOINE MÉDIÉVAL MOSAN	Yes	Social Cultural
MONUMENTENWACHT	Yes	Economic Cultural
NEW APPROACHES TO THE CONSERVATION OF FURNITURE IN BOULLE-TECHNIQUE	No	
NUMBER 2 BLAST FURNACE, SAGUNTO	Yes	Social Cultural Environmental
REHABILITATION OF A FORMER FOUNDRY	Yes	Economic Cultural
RESTAURATION OF LA FUENTE DE LOS LEONES	Yes	Economic Social Cultural Environmental
RESTORATION AND TECHNOLOGIC ADAPTATION OF TEATRO SOCIALE IN BERGAMO	Yes	Economic Social Cultural
RESTORATION OF THE “SECOND TEMPLE CYCLE” (1928)	No	
RESTORATION STUDY FOR THE NOLLA PALACE, MELIANA	Yes	Social Cultural
ROMAN VAULTED CONSTRUCTION IN THE PELOPONNESE	No	
ROMÁNICO NORTE – ROMANESQUE NORTH	Yes	Social Cultural Environmental

ST PAUL'S BRISTOL, CIRCOMEDIA	Yes	Economic Social Cultural Environmental
TER DOEST ABBEY BARN IN LISSEWEGE	No	
THATCHING IN WEST EUROPE FROM ASTURIAS TO ICELAND	No	
THE ATLANTIC WALL LINEAR MUSEUM	No	
THE BELVEDERE ON PFINGSTBERG IN POTSDAM	Yes	Cultural
THE COEN CASE WESTFRIES MUSEUM	Yes	Social Cultural
THE SARCOPHAGI OF THE DUKES OF POMERANIA	Yes	Economic Social Cultural

SOURCE: OWN.

The majority of the respondents (72%) assume that their project has generated an impact on the socio-economic level, although no impact assessment has been conducted. All of them suppose the impact concerns the domain of culture, while 53% situate it also in the domain of economy, 76% on the social and 35% on the environmental level.

Many of the respondents deem that the impact of the project is mostly visible when it comes to such indicators as attendance level and revenues of the organiser. However, some of the respondents do mention significant impacts on multiple levels. A respondent representing the Coen Case project in Westfries Museum in the Netherlands, for instance, stated that, even though the project had not yet been the subject of an impact assessment, it had historical, educational, use-functional and political value and had had a considerable impact on community participation and social cohesion:

The project was the museum's answer to heritage that had become controversial. It helped inhabitants of the town of Hoorn to create their own opinion in a heated debate over a statue of Jan Pieterszoon Coen, an important historical, but also controversial figure. The project offered facts, different opinions and a historical context and stimulated visitors to come up with their own opinion based on these ingredients in a creative and stimulating setting. Thus, the museum facilitated a heated public debate that had a political side as well, because the city council had decided what to do with the statue which some people wanted to remove (political value). More than 3,000 people left behind a motivated opinion on the matter in the museum (impact on community participation) and more than 1,200 schoolchildren participated in the project (educational value). In this way the museum helped to canalise the debate that otherwise would have become very one-sided (social cohesion). The museum wrote the text for a new informa-

tion panel on the base of the statue with a QR-code that leads to a permanent website about JP Coen (use-functional value) (information obtained from Ad Geerdink, Director of the Westfried Museum).

Another example of a project with a supposed social impact is the Lyceum Passos Manuel project in Lisbon, Portugal. As the earliest secondary school building in Portugal, it is of great cultural and historic significance and its educational role carries considerable emotional value for many generations of students and staff. The building was renovated from 2008 to 2010 with minimum intervention and managed to retain its cultural significance, while updating its educational facilities to current standards. Concerning the impact of the project on a social level, it was stated by the respondent that:

- *Students feel proud of the place where they are studying; they are aware of the historic value of the place. The intervention kept its aesthetic image and provided a regeneration opportunity for the local community, former students feel that the place has been preserved for the future generations while the current generations are enjoying and carrying for the built environment which foster social relationships (information obtained from Sofia Aleixo, founding partner at Victor Mestre/Sofia Aleixo Arquitectos).*

Other respondents acknowledged that their project might have had an impact on attracting new businesses and on the revaluation of the urban area. In relation to the project of St Paul's Church Circus School in Bristol, the UK, for example, it was stated that:

- *The area in which the church is situated has seen significant regeneration with people returning to live and work in a previously derelict square. Investment by businesses and the local authority have followed and the whole area has been regenerated and has become a popular part of Bristol again. The project itself has grown, attracting new funds and audiences and is thriving ten years after having been set up (information obtained from Crispin Truman, CEO at The Churches Conservation Trust).*

*3.3

REFLECTION AND CONCLUSION

The above presentation of the results of an online survey conducted among the winners of the EU Prize for Cultural Heritage/Europa Nostra Awards, supplemented with the evidence from consultations with the projects' organisers, leads to a general conclusion that impact assessment studies are not, as yet, fully and consistently used in the cultural heritage sector. Only one-third of the respondents claimed to have performed some kind of evaluation of a potential influence of a given project on its socio-economic context. As the respondents did not provide a justification, one can only speculate on the reason behind such a low use of impact studies (lack of financial resources? lack of knowledge, awareness, skills?). However, when asked for a personal opinion, the majority of respondents that did not run an impact evaluation programme claimed that their project must have had an impact. Referring to that, the authors of the re-

port may hope that the mere fact of conducting a survey among the winners of the prize raised their consciousness about the importance of impact evaluation (contributing to one of the CHCfE project's aims), and that it itself might lead to these participants as well as the EU and Europa Nostra introducing research in the field of impact for future projects.

The EU Prize winners constitute an interesting group for further research for at least two reasons. These projects could be assumed to enjoy a wider recognition among not only the specialists in the field of cultural heritage but also the general public. As such, they could generate greater effects on their economic, social, cultural and environmental context (e.g. thanks to a bigger number of visitors). If the effects were bigger and more visible, they could be easier to identify and measure in order to provide research-based evidence on positive and adverse impacts of cultural heritage in accordance with the holistic four domain approach.

Another issue is the exemplary role of EU Prize projects — the dissemination of their impact assessments could make local communities and local authorities more aware of the importance of their own heritage and encourage them to preserve their heritage and use it as an important resource for sustainable development.

Furthermore, there is a need to start collecting data at the beginning of the project in order to be able to measure the relative impact of the intervention at each level — direct neighbourhood, city, and region. Such data collection should also include questions pertaining to the reasons winners did or did not conduct impact assessments as well as why they assume *a priori* their project generate considerable impact or not. Regularly collected data will result in material allowing for comparisons, both within one project, as well as with other projects of a similar character located in other cities or countries and for identification and analysis of trends over time. ⊗

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The list of “national” experts contributing to the Central Europe literature review included:

Dr. Mona Mairitsch (Austria), **Dr. Nataša Urošević** (Croatia), **Dr. Jan Dolák** (Czech Republic), **Dr. Riin Alatalu** (Estonia), **Péter Inkei** (Hungary), **Dr. Vaidas Petrulis** (Lithuania), **Dr. Baiba Tjarve** (Latvia), **Prof. Sergiu Nistor** (Romania), **Michaela Kubíková** (Slovakia), **Daniela Tomšič** (Slovenia).

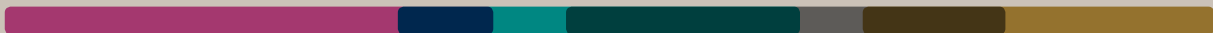
CULTURAL HERITAGE COUNTS FOR EUROPE – THE PROJECT

The Cultural Heritage Counts for Europe project was carried out between July 2013 and June 2015 with the support of the European Commission and in response to the position paper 'Towards an EU Strategy for Cultural Heritage – the Case for Research' presented in 2012 by the European Heritage Alliance 3.3.

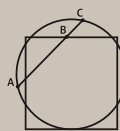
This project comprised collecting, analysing and consolidating evidence-based research and case studies from different EU Member States on the impact of cultural heritage on the economy, society, culture and environment with three aims: to demonstrate the value and potential of cultural heritage as a strategic resource for a sustainable Europe; to raise public awareness of this resource; and to present strategic recommendations to European decision makers.

The project was coordinated by Europa Nostra through a Steering Group composed of all project partners: ENCATC (The European Network on Cultural Management and Cultural Policy Education), Europa Nostra (The Voice of Cultural Heritage in Europe), Heritage Europe (The European Association of Historic Towns and Regions), The Heritage Alliance from England, UK as well as The International Cultural Centre, Krakow (Poland) and The Raymond Lemaire International Centre for Conservation at the University of Leuven (Belgium) who were responsible for conducting the EU-wide survey and analysis of existing research and case studies on cultural heritage impact assessment.

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