

# BEST PRACTICE INVENTORY







# Introduction

Topics:

 **Territorial strategies,  
policies and guidelines:**

To design the process of HBA management in a cross-sectoral, interdisciplinary and participative way.

 **Implementation  
Tools:**

To design the process of HBA management in a cross-sectoral, interdisciplinary and participative way

 **Financing procedures  
and funding search:**

To design the process of HBA management in a cross-sectoral, interdisciplinary and participative way

 **Awareness improvement  
and proactive involvement:**

To design the process of HBA management in a cross-sectoral, interdisciplinary and participative way

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## Introduction

### 1. Territorial strategies, policies and guidelines

As a consequence of the historical developments, still today the core of the model of a European City is the public influence on urban development, and the perception of the city as a collective identity. On-going efforts towards sustainable development require sound and innovative perspectives on human rights and democratic governance, beyond solely economic concerns. With the consideration of heritage as a social, economic and political resource, it is essential to develop a new way of looking at heritage, by setting the ground to reframe relations between all involved stakeholders. An enhanced definition of heritage and a new approach to heritage governance present challenges for countries. In the context of eastern Europe, there are many small and medium-sized heritage towns with historic urban areas and valuable cultural heritage assets facing various challenges. Some of these challenges include economic downturns, emigration of skilled people, as well as ageing populations. Experience with participatory practices and local community engagement for the preservation and reactivation of the cultural heritage to support the cultural, socio-economic urban development is in its early stages. In this context, preserving and reactivating heritage sites - whether they are historic, spiritual or industrial - implies the double challenge of dealing with low investment in capacity and limited skills and resources.

*The following BPs offer solutions and ideas to support this approach to the governance of HBAs*



Territorial strategies, policies and guidelines



Implementation Tools



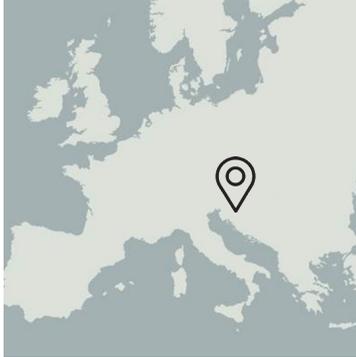
Financing procedures and funding search



Awareness improvement and proactive involvement



Location: Danube Region



### Players

SiTI - Superior Institute of territorial systems for the innovation

JRC-IES of European Commission (Joint Research Centre, Institute for Environmental and Sustainability)

### Contacts & sources

[http://www.siti.polito.it/index.p?id=2&t=tpl\\_6&l=ITA&idp=243](http://www.siti.polito.it/index.p?id=2&t=tpl_6&l=ITA&idp=243)



# 1.1. Danube Strategy “Thematic Data Harmonization Pilot: Cultura Heritage use case”

The project provides the international database development, based on the INSPIRE legislation, able to support the European strategies in Danube Region (Danube Strategy). In particular, the project pursues the protection and the security of Cultural Heritage. The project will allow the drafting of some statistics about the Cultural Heritage’s risk exposure, in particular earthquakes, floods and fires.

### Timing

7 months (from November 2015)

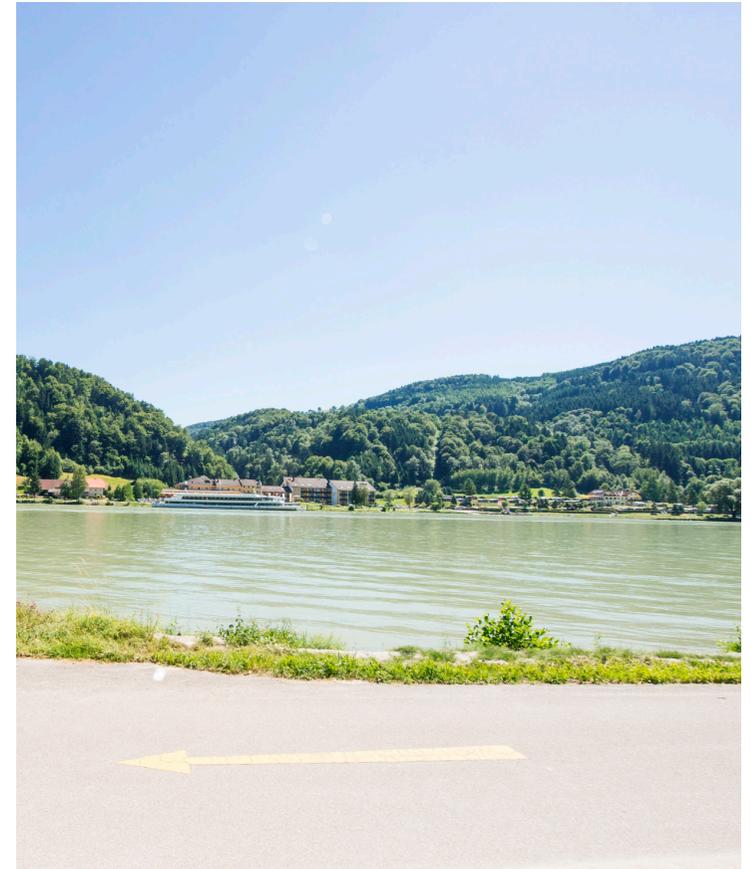
### Main goals

The main goal of the project is the territorial data’s pooling.

The data (collected by different entities) will be inserted in the international database and used for the territorial analyses about the risk and the vulnerability of Cultural Heritage caused by natural events.

In particular, the project aims at:

- Identify the availability of existing data on the platform DRDSI
- Identify and analyze data related to natural hazards and cultural heritage in the Danube Region
- Design of the “data model” inherent cultural heritage and natural hazards
- Creating a pilot database for the Danube Region
- Analysis of cultural exposure to natural hazards
- Perform Statistical analysis of the data collected.





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### Key-outputs

Final Output of the project will be the international database.

- a pilot database for the Danube Region, following the criteria of the INSPIRE Directive with reference to the protection and safeguarding of cultural heritage from natural hazards (floods, fires and earthquakes).
- an official scientific publication by the European Commission participated by SITI.
- a “user story” document reported on European Commission website



### Key facts

The main actions of the project are:

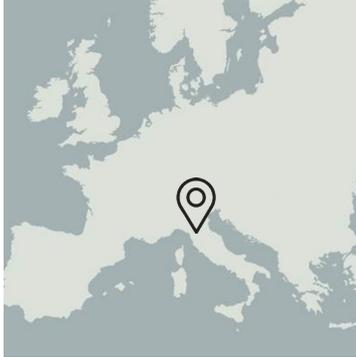
- Identify and collect the data about cultural heritage present in the area;
- Identify and collect the data about natural risk and some information about the natural events happened in the past;
- Project the innovative data models for natural risks and cultural heritage;
- Plan the pilot database for the Danube Area;  
Draft some statistics about the Cultural Heritage’s risk exposure, in particular earthquakes, floods and fires.

### Reasons of interest

The database will allow the pooling of data and information in standard format to the stakeholders present in the area.

The main innovative goal is the possibility of integrating international data and information. That way the project will guarantee the territory safe both international and national.

Location: Emilia Romagna



### Players

private and public subjects at national, regional and local level

### Contacts & sources

[agenziaricostruzione@regione.emilia-romagna.it](mailto:agenziaricostruzione@regione.emilia-romagna.it)

<https://openricostruzione.regione.emilia-romagna.it/>

## 1.2. Management of the Earthquake damaged HBAs reconstruction in Emilia-Romagna Region (Italy)

On the 20th and the 29th of May 2012 two earthquakes of medium intensity (magnitude 5.9 and 5.8 on the Richter scale) affected the Province of Modena, Ferrara, Bologna, Reggio Emilia (Emilia Romagna Region) and Mantova (Lombardy Region), with 28 deaths, 300 injured, 45.000 homeless and dramatic impact on buildings, houses, schools and industrial plants (damages for EUR 13,2 billions). It was an inter-regional disaster that clearly required co-ordination at the national level.

### Financing

Public funds from different levels: national and regional

Private funds: insurances, owners (citizens and entities), donations

### Timing

2012-present (Last year strong acceleration of the historical city centers)

### Main goals

- Restore the living conditions in E\_R after the earthquake: giving back their home to the citizens, restarting the economical, cultural and social activities
- Preservation and valorization of the ancient urban areas both in the streets and squares network and in the built environment
- Preservation of the main building and assets for the identity of the local communities, improvement of the seismic and energetic performances of buildings
- Improvement of the urban quality and security





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### key-facts

The earthquake affected an area of former independent municipalities, historic capitals and small states with rich cultural heritage. Until 2003 the affected area was not classified as having significant hazard by Italian seismic hazard maps. Hence, buildings in the area were not required to be designed according to the seismic code.

Strong damage was observed on:

- historic centers: monumental and historical buildings in particular churches, clock and bell towers, castles and town halls. According to an approximate balance of the damages caused



### Reasons of interest

- the planning and procedures used to manage the emergency phase, in order to avoid the destruction of historic buildings and related amovable cultural heritage like paintings, sculptures etc
- The way identified in order to use specific procedures and funds for historic areas, aiming at preserving the historic, cultural and identity's value of these goods
- The cooperation between private and public subjects, Italian and not, at national, regional, local level.
- The way public and private sector try to transform the emergency into the opportunity to reconstruct better than before (e.g. industrial buildings more efficient and safe)
- The complexity of intervene on historic centers, already in difficulties before the earthquake

## [Management of the Earthquake damaged HBAs reconstruction in Emilia-Romagna Region]

to cultural goods in the region about 700 listed secular buildings and groups of buildings were damaged. In addition, there are c. 400 churches, 147 bell and city towers seriously hit. Hundreds of works of art had to be salvaged from partly or completely destroyed churches and museums, among them works by Guido Reni, Guercino and Correggio. 25 municipal archives were damaged; seven of them could be salvaged.

- rural heritage and rural historic landscape. The historic rural farmhouses were the most damaged, for sure because they were abandoned or damaged already before the earthquake.
- productive system and industrial sheds (food industry, biomedical, mechanical and pottery in particular; the area comprises the world-wide excellence biomedical cluster, in Mirandola).

For the first time in Italy, an earthquake hit a productive system: in the affected area is produced around the 2,5% of GDP.

“A committee for emergency governance was immediately created, consisting not of outside experts but of local and regional government authorities: the President of the region was nominated as head of the committee and mayors of the cities affected by the earthquakes (54 towns were affected), together with presidents of the counties (provinces) were designated as members of the committee. The committee was able to immediately design a plan for reconstruction, putting the coherence and the involvement of the local communities at the heart of the plan. Thus the reconstruction of schools and the continuity of the education system despite the earthquake was a first priority”<sup>1</sup>.

“The governance of the emergency in this case has been characterised by three main elements. First, it included a rapid setting of priorities. The overwhelming priority was to maintain the cohesion of the local communities, and for this purpose actions were primarily orientated towards schools and work (allowing families to send their children to school and ensuring restart of economic activities so that people could continue their normal working life), besides of course providing shelters to homeless people. Second, the governance was democratic and participative, with regional authorities guiding the process but including the local authorities (mayors of the affected cities) in the process. In addition this democratic governance was also characterised by reliance on own forces: a call was made to engineers and experts from other regions to help the recovery process but the key priority-setting and decision-making was made autonomously by the regional stakeholders, in a self-government process. Third, governance was lead at the regional level: neither too local as would an action decided only at the level of the affected area, neither too broad as would be an action decided at national level<sup>2</sup>”. The literature has stressed out that too centralised government processes are neither effective or efficient. Too local reactions may not be effective however, because the local population is too emotional and materially affected. A meso-level might therefore be more appropriate, such as the regional one, and this is what the ER case shows.

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1 Patrizio Bianchi, Sandrine Labory. The role of governance and government in the resilience of regions: the case of the 2012 earthquake in the Emilia-Romagna region in Italy. *Incertitude et connaissances en SHS : production, diffusion, transfert*, Jun 2014, Nice, France. <halshs-01166138>

2 ibidem



“The management of emergency was so successful that many firms, in particular multinational firms in the biomedical sector in the Mirandola cluster, which laid at the epicentre of the earthquakes, decided to take advantage of the need for reconstruction to increase productive capacity”<sup>3</sup>. 6 years after the disaster, the productive system has been completely renewed, with safer and more efficient industrial buildings. As a result it was noticed an increase in exports.

If for facilities, residential buildings and public infrastructures the process worked well and we can say that it was a great success, the situation about the historic centers is something more complex, because it required a mix between emergency procedures, essential needs, cultural values, emotional choices. Most historical structures sustained moderate or higher levels of damage, and partial collapse was not uncommon. The seismic event impacted not only on a physical sphere but also on the social, economic and cultural fabric of the affected towns. These were already suffering of depopulation, ageing population and problems in finding the funds to intervene on the cultural goods (e.g. high costs of maintenance and transformation, often too big for the town to find an appropriate use, no tourism).

Affected population needed houses but also services, public spaces and meeting places, placed in the historic centers but strongly damaged by the earthquake. New service areas - temporary or not - were made available for the communities outside the town centres. These modified the attendance of traditional public spaces and some functions found a new permanent location outside the historic centre.

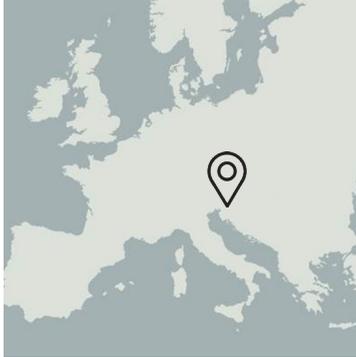
Meanwhile the actors involved in recovering public and historical buildings are 125, of which 76 Municipalities and Provinces, 13 religious entities (Dioceses and Parishes), 36 others. The predisposition and approval of projects is long and laborious: the technical solutions proposed, approved and then carried out must necessarily take into account conflicting aspects (such as the introduction of new structural elements, necessary for the improvement of the behavior of the building towards earthquakes and the need to respect the original conformation of the building).

The investment for the recovery of the historic centers with public and private works amount to EUR 1 billion with 2.600 funded interventions, of which 60% done or work in progress.

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<sup>3</sup> ibidem

Location: Zagreb



### Players

Several city offices, companies and institutions as well as external associates participated in the implementation of the project

### Contacts & sources

*mail: [branka.tabak-parascic@zagreb.hr](mailto:branka.tabak-parascic@zagreb.hr)*

## 1.3. Revitalization and Energy Reconstruction of the Lower Town - Phase I and II, City of Zagreb

The area of the Lower Town where the project will be implemented is entirely inside the HBA, for which, with the decision of the Ministry of Culture, the property of cultural heritage is registered and entered in the Register of Cultural Property of the Republic of Croatia. The construction fund within the scope of the project consists mainly of buildings constructed during the period of historicism (2nd half of 19th century) and secession (beginning of the 20th century), with a significant share of the creation of Modern (period between the two world wars), as well as post-war architecture.

### Financing & Timing

First stage: February 2014 - December 2014; about 135.000 €

Second phase: April 2015 - December 2015; about 200.000 €. The funds were fully secured by the City of Zagreb for both phases.

### Main goals

- Establish a financial mechanism to stimulate revitalization and energy renewal
- Drafting the legislative and institutional framework for the prevention of vandalism grafting
- Revitalization and reconstruction of 10 pilot buildings with a total area of 10-15,000 m<sup>2</sup>

### Key-outputs

- Energy audits were conducted and Energy Performance Reports and Energy Certificates were produced for all 15 buildings within the pilot block;
- Project documentation for reconstruction has been produced to level of main design for all 15 buildings within pilot block;
- Continuous informing of tenant and co-owner representatives has been carried out and on several oc-





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casions conceptual solutions and planned energy efficiency measures have been presented;

- All project tasks initiated as a pilot project have been carried out to see all the legal, technical, financial and organizational complexities. The results of the project give conclusions and recommendations to be used in implementation of renewal.

### Reasons of interest

Project demonstrated complexity of implementation of a project for restoration of protected historic buildings and need to involve various stakeholders in order to successfully realize it. The project presents aspects of implementation of such a large and complex project: legal, financial, economic, social, legal, communication and energy.



### Key facts

Project Revitalization and Energy Reconstruction of the Lower Town consists of two key phases:

1) Preparatory phase in which it is defined:

a. way of managing entire project, governance structure and key stakeholders, way of monitoring implementation, quality control and reporting (Work Package 1)

b. Prepare Program Implementation Action Plan, which is key implementation document (Work Package 2)

c. Analysis of technical and energy aspects of Program Implementation (Work Package 3)

d. Analysis of financial aspects and in particular the financial model for the implementation of the Program (Work Package 4)

e. Analysis of Legal Aspects of Program Implementation (Work Package 5)

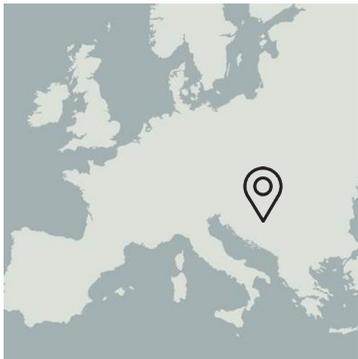
f. Economic and Social Impact Analysis in Program Implementation (Work Package 6)

g. Specific conditions regarding the reconstruction of historic buildings (Work Package 7)

h. A communication strategy involving all relevant stakeholders (Work Package 8)

2) Project Implementation Phase (Work Package 9), where all work packages and results from the preparatory phase serve as support for implementation

Location: Ilok-Vukovar-Vučedol



#### Contacts & sources

<http://ilok-vukovar-vucedol.min-kulture.hr/>

<http://www.min-kulture.hr/default.aspx?ID=8425>  
(25.1.2013.)

*Ministry of Culture of  
the Republic of Croatia,  
Phone: + 385 1 4866  
666*

## 1.4. Project “Research, Reconstruction and Revitalization of Cultural Heritage Ilok-Vukovar-Vučedol”

In the area of Ilok, Vukovar and Vučedol (Vukovar-Srijem County, easternmost Croatian county), the project has planned and realized investment in research, restoration and revitalization of historical and cultural heritage as well as investments in scientific facilities and museums.

The project was prepared in 2004 by the expert group at the Ministry of Culture of the Republic of Croatia from the Osijek Conservation Department, the Croatian Restoration Institute, the City Museum of Vukovar and others. Along with experts from the Ministry of Culture of the Republic of Croatia (The ministry is also the project leader) and its Conservation Department in Vukovar in the implementation of the Project, they also participated as the Carriers of the relevant Program Implementation Contract: Croatian Restoration Institute for the reconstruction of 12 houses in the baroque nucleus and the Eltz castle complex with Vukovar manor houses, in Ilok for Odeschalchi castle, Medieval fortress plateau and walls, Franciscan monastery and the church of St. Ivana Kapistrana, Baroque building - Žitnica, Vukovar City Museum for the Museum of Vučedolska Culture, Ilok Museum for the Landscape in Ilok’s Historical Center, Archaeological Institute for Archaeological Research in Ilok, Department of Archeology at the Faculty of Philosophy, University of Zagreb, and Archaeological Museum in Zagreb for archaeological research and an international archaeological school in Vučedol. In the implementation of the Project program were included the Faculty of Architecture of the University of Zagreb,





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the Urban Planning Institute of Croatia and others with the cooperation of Ilok and Vukovar Towns and Vukovar - Srijem County, as well as numerous experts from Croatia and abroad already involved in a number of smaller projects in this area.

### Financing

The project, as it is known, is financed by the Government of the Republic of Croatia (25%) and the Council of Europe Development Bank (75%), public loan no. F / P 1511 (2005), in the total amount of 226.288.358,00 HRK (30.215.654,00 EUR) and additional funds from the state budget.



### Key facts

The project's programs included comprehensive archival, historical, archaeological, conservation and restoration research, geomechanical and static examinations, architectural and landscape restoration, a new museum image and interpretation of culture and history with new material evidence deriving from recent research of the monumental complex of Ilok historical nucleus is to be presented in the end in 2015 as a systematic interpretation of the whole of the joyous medieval "acropolis".

In particular:

- investments in scientific facilities (Vučedol Research Center)
- new museum stands in Odescalchi and Eltz in Ilok and Vukovar
- construction of a new museum of the Vučedol culture at the Vučedol archaeological site
- restoration of the historical matrices of towns of Vukovar and Ilok with the introduction of new contents in this area and determination of purpose and decoration of space is in line with its extremely high historical values.
- landscape, spatial and historical analysis of parkland around the castles in Ilok and Vukovar and their presentation is an integral part of this project.

## [Research, Reconstruction and Revitalization of Cultural Heritage Ilok-Vukovar-Vučedol]

### Timing

Period of the project is from 2005 to 2015.

### Main goals

The renewed part of the cultural heritage in Vukovar-Srijem County, the swing of all the professional and scientific researches related to the “Ilok-Vukovar-Vučedol” project, is a pledge of new orientation in its presentation as well as links to the contents strongly linked to a new reflection on the sustainability of cultural heritage.

In addition, there is a wide open space for continuation of regional, national and European connectivity in a series of already open projects within the Danube Strategy of the EU, Cultural Contact Points of the EU, IPA, UNESCO, EU Programs and other programs.

The project continues or opens up the areas of partnership cooperation between states, regions and cities, all of the Danube Region countries as well as cross-border cooperation areas.

### Key-outputs

New museum-gallery units have been opened - along with the Vukovar City Museum and the Vučedol Culture Museum and the renovated Odescalchi Castle complex in Ilok and a new exhibition of the Museum of Ilok as well as archaeological parks in Vučedol and in the old nucleus of Ilok with the restoration of war-devastated monumental ensembles in Vukovar, opening of research centers and other.

Main building of the Eltz manor house complex and associated pavilions was restored at the end of October 2011, creating conditions for realization of much of permanent exhibition of the Vukovar City Museum, which is open at beginning of 2014.

Complete the remaining project programs in Ilok: medieval fortification complex of the 15th century, in Vukovar the complete re-installation of the rest of the reconstructed complex of the Eltz castle and the manor houses and the opening, at Vučedol, the opening of the new Museum of Vučedol culture with a complex presentation of this eponymous site, is foreseen for 2015.

Planned renovation projects:

- Project: Ilok,
- Project: Baroque core of the town of Vukovar,
- Project of reconstruction of the Eltz and
- Project: Vučedol

were realized in full scope.



A perennial blend of cultural and natural values has been achieved in line with historical artifacts. This is evident through the renewed urban matrix of Ilok and Vukovar, together with a landscaping analysis of the associated park contents that, united with the Odescalchi and Eltz castles, ensured the realization of the entire presentation.

### Reasons of interest

The significance that has been achieved in the region goes beyond its borders and in the context of the whole of the Republic of Croatia creates a new dimension of the use of monumental heritage as an inexhaustible resource for the development of new achievements in all parameters of the social community.

Multidisciplinary approach at the national level is one of the most complex programs of revitalization of monumental heritage.

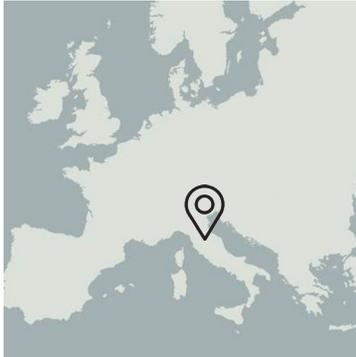
The application of modern methods of reconstruction, restoration techniques, presentations, sublimate all the factors in the set goals.

It is now possible to find out the results that are being overlooked by an increasing number of tourists, with the interest of everyone in the professional and disadvantaged public, and the citizens of this region can proudly look back on new contents in their surroundings. With the opening of museum-gallery units: the Vukovar City Museum, the new Vukovar Culture Museum with the archeological park, the Ilok Museum Museum in the renovated complex of the Odescalchi Palace in Ilok, the opening of research centers and the special rehabilitation of the war devastated historical units of Vukovar was created as a basis for the full development of the region in scientific, technical and economic aspects.

In this way, investing in cultural heritage proved to be more justified. There is space for cooperation between the countries in the European environment and participation in a series of already started projects within the Danube Strategy, IPA, and UNESCO.

With full conviction, it can be argued that the implementation of the project “Investigation, Reconstruction and Revitalization of Cultural Heritage Ilok-Vukovar-Vučedol” has given rise to a cultural phenomenon in this area and will for a long time be the most important center of European significance.

Location: Florence



### Players

SiTI - Superior Institute of territorial systems for the innovation  
Municipality of Florence - UNESCO office

### Contacts & sources

*Municipality of Florence - UNESCO office* <http://unesco.comune.fi.it/progetti.html>

<http://www.siti.polito.it>

<http://www.firenzepatrimoniomondiale.it/destinazione-firenze/>



## 1.5. DESTINAZIONE FIRENZE Tourism Management Plan - Florence (Italy)

In agreement with the City of Florence, SiTI will carry out a research able to define a Tourism Management Plan of the Historical Centre of Florence. The project consists of analysis - desk, perceptual, territorial and cartographic - of the tourist demand and offer of the historical center.

### Financing

The “Destinazione Firenze” project was financed under Law 77/2006 of the Ministry of Cultural Heritage.

### Timing

12 months (2012-2013)

### Main goals

As its ultimate goal, the project pursues the promotion of city’s areas that are not frequented by tourist, despite the presence of many important monuments or attractions. The aim is to identify alternative ways of managing tourist flows to relieve the city’s most crowded places and enhance the value of underused areas.

### Key-outputs

Final Output of the project will be the drafting of Guidelines. Updated guidelines for the protection, conservation and dissemination of heritage value. Guidelines of action to be considered for the drafting of a strategic plan for a strategic development of tourism use and for an effective management of





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flows. Three main guidelines can be summarised: TRAINING to offer a broader knowledge of the opportunities of the city, in addition to those consolidated that generate crowding.

Offering a supplementary training aimed at the knowledge of the tourist realities (cultural, receptive, handicraft, gastronomic) scattered in the territory surrounding the city.

COMMUNICATION to make certain places more attractive through targeted marketing strategies.

VALORIZATION to promote a series of actions (crafts, food and wine, reception points) in order to make the experience of the tourist more engaging.



### Key facts

The main actions of the project are:

- Demand and offer analysis
- Cartographic Touristic Offer analysis

The main instruments are:

- Statistic data analysis
- Questionnaire
- Communication products Analysis
- GIS Analysis

### Reasons of interest

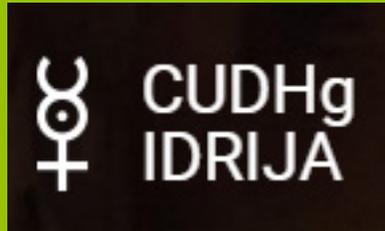
The project, using the Visitor Management Methodology, an innovative study that has the visitor as the center of the touristic experience, wants to delocalize the touristic flows in some city's areas that are less known by the people.

Location: Idrija Region



### Players

The UNESCO nomination documentation has been prepared by Idrija Mercury Mine, Idrija Municipal Museum, Historical Archives Ljubljana, Unit in Idrija, Institute for the Protection of Cultural Heritage of Slovenia. Main institutions responsible for undertaking the management plan are Idrija Heritage Centre, Information and Research Centre for Mercury, Idrija Mercury Heritage Information and Interpretation Centre.



## 1.6. Idrija: Heritage of Mercury

The Heritage of Mercury in Idrija includes the area of the mine, the roads in Idrija, which linked the mine and the core center, beginnings of various trade routes which were used to transport mercury from Idrija to the world, the old town of Idrija which reflects the way of life of miners, the water barriers (klavže), located on rivers in the surrounding woods and the nearby watercourses of Idrijca, Belca and Kanomljica.

The main element of the protected site presents the central area of the immovable cultural monument and encompasses the historically-defined boundaries of the town centre. The town centre comprises individual buildings, streets and extensive city spaces throughout the mine's 500 years of history. The protected Idrija old town is the core zone, being the location for the majority of monuments connected to the town's history of mercury mining. It developed just above the mine. So the development of the mine influenced the development of the town and its urban structure.

### Built heritage characteristics

Regarding the BhENEFIT project HBA area is old town of Idrija. The area has a status of monument of national importance. The protected Idrija old town locate the majority of monuments connected to the town's history of mercury mining. Cultural monuments in Idrija, be it of national or local importance, are almost all related to the discovery of mercury and its mining stretching over the 500-year history of the mine.

The area comprise of 79 cultural heritage units inscribed in the Cultural Heritage Register. 45 units are within the protected old town and 34 in the Buffer Zone (<http://giskd.situla.org>).

Challenges and problems related to management Mining brought adverse effects apart from its positive economic benefit during the busiest periods in of the mine. The effects, seen mainly in the town of Idrija, include a degraded environment. Development pressures are also caused by industry.

### Financing

The Idrija Municipality allocate 8% - 15% of its annual budget for activities related to the conservation and preservation of CH. Since 1978, all the activities related to the closure of the mine, maintenance, rehabilitation of parts on the surface damaged by mining activities, and its monitoring, are funded from the national budget.

#### Sources

##### Public funds

- funds from the Idrija Municipality's budget - used as a means of funding public programmes;
- funds from the national budget dispensed by the Ministry of Culture - used as a means of funding activities related to the protection of national cultural monuments;
- funds from the national budget dispensed by various ministries
- Private funds
- funds obtained through money-making ventures;
- funds obtained through the lease or licensing of



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tourism activities and other services to contractors, etc.

- EU programmes
- Donations

### Timing

HBA area gain UNESCO heritage site status in 2012. The model of management was established by local community in three stages. Formation and the beginning of the UNESCO information-interpretation Point activities, establishment of contractual alignments between institutions and organizations in the area of cultural heritage and the establishment of local partnership among social actors, formation of legal organizational form (Idrija Heritage Centre (2010), Idrija Mercury Heritage Information and

### Contacts & sources

[www.cudhg-idrija.si/](http://www.cudhg-idrija.si/)  
*Heritage of Mercury, Almadén, Idrija, 2011, <http://whc.unesco.org/en/list/1313>*  
*Sources for description of best practice: Heritage of Mercury, Almadén, Idrija, 2011, <http://whc.unesco.org/en/list/1313>*



### Key facts

The main actions of the project are:

- Demand and offer analysis
- Cartographic Touristic Offer analysis

The main instruments are:

- Statistic data analysis
- Questionnaire
- Communication products Analysis
- GIS Analysis



## [Idrija: Heritage of Mercury]

Interpretation Centre (2011), Information and Research Centre for Mercury (2008))

### Main goals

Main goal identified as a good practice is an establishment of management plan for HBA through a preparation of nomination documents for a status of UNESCO heritage site. The management plan is intended to be a tool for coordinated and comprehensive management of heritage sites in the Idrijan area. Its main aim is to establish cooperation and communication channels between all the subjects involved in managing the heritage sites in the area, as well as forming an all-inclusive analysis of the situation and possible improvements in protecting and developing the area.

Goals:

- Maintain, protect and develop the monuments and the zone. Monitor and analyse the state of the heritage.
- Coordinate the research and development activities.
- Present and interpret the heritage.
- International cooperation.
- Educational activities.
- Draft operational programmes.
- Counselling.

### Key-outputs

During the nomination for UNESCO heritage established a comprehensive and balanced programme of management of cultural heritage in Idrija. The aim was to establish a single tier of management. The drafting of the document has brought together the main specialist institutions in the field, which were already playing an important role in preserving cultural heritage in Idrija. At the time being the organisations managing individual units of cultural heritage in Idrija did so independently. A comprehensive and balanced programme of management of cultural heritage in Idrija proposes an upgrade of current state of management by introducing proper legislative framework and appointing a site manager responsible for coordination among various stakeholders, as well as the preparation, supervision, and implementation of the joint programmes related to the heritage preservation, interpretation, promotion, fundraising, and monitoring of the heritage elements. The proposed management model is based on linking the existing entities dealing with heritage and stresses unified management and sustainability of the heritage.

Management system bases on the concept of management as a shared system. The system follows the principles:

- Concept of a shared system in which the various levels of government, institutions, centres, owners and local community participate, as well as all of the players involved in management.



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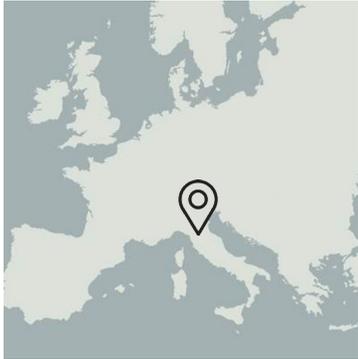
- Management system based on the concept of sustainable development.
- Environmental approach - planning environmental protection measures to safeguard man and nature from the harmful effects of mercury.
- Development of tourism with an approach that is sustainable and based on diversity, respect for human values, the environment, history and culture.
- Concept of education and research as dynamic factors not only in social but also in economic terms.
- Consolidation of the image of communities that are historically linked to the development of education and science.
- Linking management with handicrafts and other traditional biblioproducts that show the cultural significance of the site while also constituting a form of job diversification.
- Heritage conservation as a way of promoting the local and regional economy.
- Development of the inhabitants' values on the basis of their commitment to the history of the site and by means of the programmes to disseminate culture and history.

### Reasons of interest

The case was chosen as an example of best practice establishing HBA management. UNESCO Heritage of Mercury site is included on the World Heritage List from 2012 and is as such undoubtedly of outstanding value. The UNESCO Heritage of Mercury conforms to strict requirements of passing the UNESCO's World Heritage List nomination. The process took into consideration almost all "best practice" criteria prescribed in the framework of the BhENEFIT project, even more the criteria were implemented. The process of HBA management has been design in a cross-sectorial, interdisciplinary and participative way. This process resulted in sustainable long term management plan for the UNESCO heritage.

The established management plan for HBA UNESCO Heritage of Mercury has been developed cross-sectional interdisciplinary was. That was the key to write a sustainable and operative plan.

Location: Serravalle, Italy



### Players

Municipality of Serravalle

ENEA - Italian National Agency for Technology and Sustainable Economic Development

Contacts & sources  
<http://www.enea.it/>

*ENEA's Technical Reports for the project Vittorio Veneto*

## 1.7. Serravalle Historic Center

Energy-conscious methodologies for the sustainable recovery of historic centres applied to the pilot project for the recovery of Serravalle historic centre.

### Financing

The design of the interventions on the buildings of the historical centre of Serravalle involved in the project took into account the guidelines set out in the “Guide to the experimentation programmes for residential building and housing policies” of the Ministry of Infrastructure and Transport.

ENEA (Italian National Agency for Technology and Sustainable Economic Development) which took care of the part relating to the experimentation of the programme “Neighbourhood Contracts II”.

### Main goals

Purpose:

- Redevelop urban environments degraded, lacking services and with clear housing discomfort.
- Improve the quality of life of the local community.

Aims :

- the conservative recovery of some bound buildings - ERP settlements.
- the implementation of sustainable interventions with a high degree of innovation.





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### Key-outputs

Diagnostic investigations represented a cognitive tool for the study of:

- construction aspects (from historical and energy surveys)
- material characteristics (fundamental for operating in the field of tied buildings)
- micro and macro-climatic aspects (incidence of environmental indicators in indoor and outdoor comfort)

These kind of studies made it possible to define the material and energy characterisation of the individual architectural episodes, as well as sustainable restoration and/or conservation restoration and, above all, to propose the use of specific innovative materials for energy, architectural and environmental recovery.



### Key facts

Integrated and targeted operations on “Strategic poles” for sustainability  
**SUSTAINABLE PLANNING**

Complex interventions aimed at architectural, energy and environmental restoration and renovation of prestigious buildings

- Fabric specificity = Qualifying interventions for themselves and for the territory
- Social, physical and expressive structure of the city = insertion of interventions aimed at reconstructing the fundamental nodes for the redevelopment of the area

### Reasons of interest

Innovative aspects and advantages:

- integration of historical readings with georadar surveys to verify historical pre-existing data
- integration of pacometric and sonic investigations to understand:
  1. the stages of development and modifications to the original structures of the building
  2. the presence of discontinuity of masonry.

Location: Vigan, Philippines



### Players

Vigan City, through the World Heritage Convention, was able to organize and empower the local community to become primary stakeholders and keepers of their tangible and intangible cultural heritage.

### Contacts & sources

<https://whc.unesco.org/en/news/948/>

## 1.8. The Vigan Conservation Program as a Tool for Development

The sustainability of Vigan's conservation management lies in its ability to engage the local stakeholders - the owners of the heritage houses, teaching institutions, artists and craftsmen, and business owners to instill the value of their heritage, which stems from being the primary trading post in Northern Philippines during the Spanish era. Every step in improving the quality of life of the community must be based in heritage. Participative governance is one of the city's strategic themes. Biguenos (Vigan locals) are empowered through their participation in the planning and implementation of programs and projects. This gives the people a sense of ownership that makes them committed in ensuring the successful implementation of the project.

### Financing

The Vigan Heritage Conservation Program is well funded to ensure its effective implementation:

- Periodic allocation of a portion of the Development Fund for heritage conservation
- Ordinance allocating 1% of the Internal Revenue Allocation for tourism and culture fund.
- Establishment of tourism and heritage-related economic enterprises like Vigan Heritage River Cruise, Buridek Children's Museum at the Fil-Hispanic Friendship Park at Mira Hills.

The ordained 1% allocation of the IRA for tourism and culture fund is a commitment on the part of the city government that the task of heritage conservation shall not be neglected by reason of lack of funds. The establishment of tourism and heritage-related economic enterprises accomplishes two-fold: earn income and promote the preservation of our heritage.

### Timing

2011-2012

### Main goals

- Adoption of several measures by the City Government to promote sustainable development and use of local resources;
- To organize and empower the local community to become primary stakeholders and keepers of their tangible and intangible cultural heritage.

### Key-outputs

Training:

The City Government has established a Heritage Conservation Division manned by trained personnel and created within the City Engineer's Office to ensure that all physical interventions (repair and restoration works) within the protected zone are properly carried out, according to approved engineering and



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architectural plans.

Environmental sustainability:

Several measures have been adopted by the City Government to promote sustainable development and use of local resources.

### Reasons of interest

The case study is interesting for the following aspects: cultural mapping project; establishment of City Public Safety and Disaster Risk Reduction Management Office; involvement of all stakeholders including local communities; Save Vigan Ancestral Homeowners Association; school for traditional building crafts; intangible heritage and cultural awareness; promotion of sustainable development and use of local resources.



### Key facts

■ Legislative measures to safeguard and preserve the historic city:

- City Ordinance No. 12, S.1997 delineating the boundaries of the historic core and buffer zones of the World Heritage Site;
- City Ordinance No. 14, S.1997 defining the allowable uses in the core and buffer zones;
- City Ordinance No. 7, S.2006 providing the Vigan Conservation Guidelines which provides guidelines for appropriate restoration works on historic structures, construction of new structures and development of open spaces within the protected zones. The Ordinance also created a multi-sectoral Vigan Conservation Council which formulates, recommends, evaluate and approve development plans, policies and programs relating to the conservation and development of the protected zones. A Technical Working Group implements the Conservation Guidelines and evaluate restoration/development plans for approval by the Vigan Conservation Council.

■ Cultural mapping project which has identified and documented cultural heritage resources, local arts and crafts, crafts persons and practitioners of intangible cultural heritage.

■ Establishment of a City Public Safety and Disaster Risk Reduction Management Office, as well as the adoption of fire safety measures such as preventing the use of fireworks within the protected zones.

Location: Hungary



*Nagyerdei Water Tower*

## 1.9. KEEPING THE GREEN LUNG BREATHING in Debrecen (Hungary)

Functional Rehabilitation of a community space urban green area of historic significance in Debrecen (Hungary). Debrecen is the spiritual, cultural, economic, tourism and transport centre of Eastern Hungary, one of the most dynamically developing cities in the country.

### Financing & Timing

One of the potential breakthroughs in Debrecen is tourism, and the development of tourism is highly influenced by the state of the Great Forest and more significantly of the Park Forest and by the quality of the attractions of the park. However environmental problems, the aging of the infrastructure of the facilities, the problems caused by human irresponsibility and destruction have become more and more serious in the Park Forest. For the sake of remedying the situation the Municipality of Debrecen has submitted a tender through the Competitive tourism product and attraction development construction of the Regional Operational Programme for the Hungarian North Great Plain region (ÉAOP-2.1.1/E-12-k2) under the title “Complex Medical Spa Development at the Nagyerdei Park Forest in Debrecen” in 2012.

### Main goals

The project consisting of 12 project elements is regarded as element ‘A’ of the best practice from Hungary within the BHENEFIT project D.T1.2.1 deliverable Best Practices Inventory, which is supplemented by a project targeting the preservation and tourism





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related exploitation of the Nagyerdei Water Tower, that is located in the Park Forest in Debrecen, managed by the University of Debrecen, and which was celebrating its 100th birthday in 2013 and locally protected as an industrial (cultural) heritage (element 'B').

The locally protected water tower is functioning as the safety water reserve of the Clinical Centre of the University of Debrecen. Due to the recreational purposes of the above mentioned project aiming the tourism related exploitation of the Nagyerdei Water Tower implemented within the Development of tourism attractions and services construction of the Regional Operational Programme for the Hungarian North Great Plain region (ÉAOP-2.1.1/A.1-12), the facility also greatly increased the role of the Great Forest in tourism.



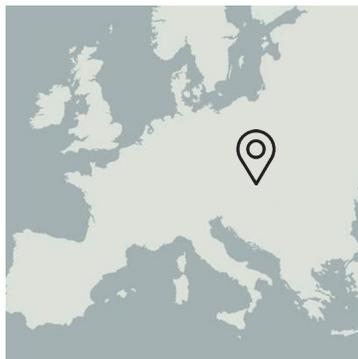
### Key-outputs

By the development project the Nagyerdei Water Tower has become a decisive unique attraction of Debrecen. The 13 newly-created innovative attractions and services introduced, the water tower further expanded the city's tourism offer.

### Reasons of interest

The two elements ('A' and 'B') on the one hand, serve as an adaptable good example on the protection, on the long-term sustainability and on the role and utilization in tourism of a historic built area of high significance in the life of a big city. On the other hand, the cooperation between the city and the university, the coordination of the individual developments are also provide important good practices since the protection of the historic built heritage can only be conceived in an integrated approach, where the values shared by different entities and managed by different organizations are combined and refurbished together, complementing each other.

Location: Mikulov (CZ)



## Players

The Mikulov municipality  
Mikulovská rozvojová,  
s.r.o.  
TIC Mikulov  
Mikulov regional museum  
NGO's  
Local people, owners

## Contacts & sources

*Městský úřad Mikulov*  
*Náměstí 1*  
*692 20 Mikulov*  
*Tel: +420 519 444 555*  
*E-mail: podatelna@mikulov.cz*



# 1.10. Mikulov Urban Conservation Area - Městská památková rezervace Mikulov (MPR Mikulov)

The project provides the international database development, based on the INSPIRE legislation, able to support the European strategies in Danube Region (Danube Strategy). In particular, the project pursues the protection and the security of Cultural Heritage. The project will allow the drafting of some statistics about the Cultural Heritage's risk exposure, in particular earthquakes, floods and fires.

## Financing

### Amount

The state and the number of historical monuments requiring restoration can't rely only on direct financial city or state support. The funding burden must be spread over several different entities (EU, region, city, private owners, users, sponsors, NGO's and foundations.)

The total cost of MPR Mikulov regeneration has so far climbed to 14.4 million EUR, and costs estimated according to the Regeneration Program up to 2022 will be roughly 3.9 mil. EUR

### Sources

The technical status of monuments and their funding are generally linked key issues of the heritage conservation and urban regeneration. All the monument owners can benefit from special titles provided by the Ministry of Culture of the Czech Republic:

- Programme of the regeneration of urban conservation areas and urban conservation zones (established in 1992)
- Emergency Programme
- Architectural heritage rescue programme
- Restoration Programme for Movable Cultural Mon-

### uments

- Support for the restoration of cultural heritage (via municipalities with extended competences - i. e. Mikulov)

MPR Mikulov projects are also co-financed by regional subsidies, of course EU programs and structural funds as well as by the form of donations. The city of Mikulov annually declares its own subsidy program - The Development Support of the Conservation Area - to the building owners.

## Timing

The town of Mikulov has a rich history and experience in regeneration process. The first proposal on MPR regeneration was in existence since 1983. The current Regeneration Program of MPR Mikulov 2017-2022 is a basic city planning document for the implementation of regeneration plans in the Mikulov MPR territory. It was built up on the previous 2005 document.

Draft schedule of actions implementing the Mikulov MPR regeneration programme

The succession of individual sub-investment projects is



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difficult to unify into a fixed schedule. The regeneration program should be understood as an open project, which will gradually complement and evolve reflecting the current situation of MPR Mikulov. The program's actions are planned with a view to 2022. The actual recommended cycle for updating the regeneration program is five-year period, with one year monitoring period of the implementation process. The document is intended to be a basic guideline, but it is not binding.

### Main goals

Main goals are:

- protection and care of historical heritage
- systematic preparation, implementation and in-



### Key facts

#### Construction activities

- when planning maintenance and investment in MPR, a care must be taken to protect objects in the reservation in order to avoid cost, cultural and economic losses
- prioritize the regeneration of objects classified as in undesired technical condition
- successive renewal of the monument fund from within the city centre to the surrounding area
- well-timed preparation of proper project documentation (including historical research)

#### Financing

- establishment of a register of costs for the reconstruction of the housing stock in buildings within the MPR area
- to struggle for other financial sources (private investment) beyond the frame of state and municipal subsidies

#### Legislation and organization

- to negotiate and approve the new local plan
- to assign an elaboration of the MPR Regulation Plan (assignment of the regulation plan was discussed and approved by the Mikulov city council, 02/2017)
- to support activities of the permanent working group

## [Mikulov Urban Conservation Area - Městská památková rezervace Mikulov]

- stigation of the restoration and regular maintenance of buildings in the MPR Mikulov area
- restoration and maintenance of technical infrastructure
- urban and architectural care, particularly in compliance with approved regulations of spatial planning and with prudent approach in maintenance of the monument fond
- completion of the public areas with small architecture and greenery, establishment of traffic-restrained and pedestrian zones
- care for the existing and restoration of the defunct historical greenery and sensible establishment of new public green
- MPR recovery, especially the Square, as a historical public centre of the city with appropriate business and public activities and operations focusing on the long-term concept and goals of the city
- restoration and care on the quality of natural components of the environment and its ecological stability
- encouraging the interest and willingness of the city's inhabitants to participate in regeneration - to instigate and support cultural and educational activities to expand information territory systems.

### Reasons of interest

- the city is a principal MPR Mikulov managing institution; uses effective cooperation with other actors including the private sector; besides the building owners it also cooperates with cultural and tourism service providers, academic sphere (i. e. the MENDELU Faculty of Horticulture in Lednice); and public participation is supported during the development of city strategic documents.
- contemporary pro-active approach of the City in MPR rehabilitation process - management is designed in a multisectoral and participative way (updated regeneration strategy 09/2017)

### Financing

- a multi-source MPR Mikulov financing based on long-term experience of all main actors in the HBA regeneration process.
- financial support through public and private funding processes
- an important participant is the state by the Ministry of Culture of the Czech Republic

### Sustainability

- long term experience in conservation process, the first regeneration conception was launched 35 year ago
- 4th regeneration strategy is implementing, action plans are continually evaluated
- results and impacts are documented and analysed



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- long term sustainability of the case study

Involvement of relevant stakeholders

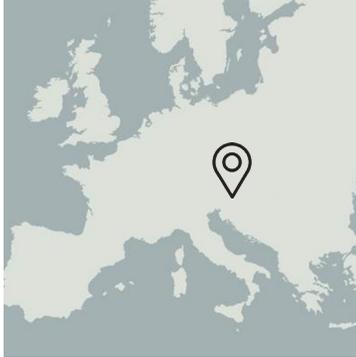
- the city of Mikulov initiates most of the steps leading to Mikulov MPR Regeneration Program physical implementation - taking care of the conservation area
- other entities are also involved, whose contribution does not necessarily have to be financial (NGOs, the public), but it is based on promotion of the historical centre, technical support, management of individual monuments (galleries), creation of thematic programs and tour events within the historical center of Mikulov, with the community life ...

Part of a more general strategy

The MPR Mikulov regeneration is based on a whole range of strategic and conceptual documents on various hierarchical levels:

- municipal - Mikulov City Strategic Plan 2013-2026 (followed with Mikulov City Action Plan 2015-2018)
- microregion - Development Strategy of the Tourist Area Mikulov, Spatial Analytical Materials of the ORP Mikulov (update 2016)
- region - The South Moravian Region's Preservation and Restoration of Cultural Monuments Conception
- state - MPR Regeneration Program, financial tool for restoring cultural monuments
- Documentation of the results
- updated MPR Mikulov regeneration program follows in previous document approved 06/2005; its outputs are continuously documented and analysed
- actual update cycle of the regeneration program was set to five years
- documentation is also carried out with the participation of the academic sphere (in particular Masaryk University Brno, Mendel University of Brno)

Location: Graz, Austria



## Players

Monastery together with  
Architect M. Lingenhölle

## Contacts & sources

<http://www.franziskaner-graz.at/>

<http://www.franziskaner-graz.at/kloster-renovierung/generalsanierung/>  
Guardian, Pfarrer  
e-mail: [josef.hoeller@franziskaner.at](mailto:josef.hoeller@franziskaner.at)

Franziskanerkloster und  
Pfarre  
e-mail Kloster: [graz@franziskaner.at](mailto:graz@franziskaner.at)  
e-mail Pfarre: [graz-mariae-himmelfahrt@graz-seckau.at](mailto:graz-mariae-himmelfahrt@graz-seckau.at)



# 1.11. Franziskaner Monastery in the touristic inner city

The renovation project of the historic building complex of the Franciscan monastery in Graz sought to preserve the integrity of the Franciscan monastery by preserving natural resources and using the sun as the main source of energy. A single solar system was mounted on the roof and facade of the southern wing of the monastery. The solar collectors on the roof and south facing facade were designed so that the historical characteristics of the roof and the historical sundial on the facade were preserved.

## Financing

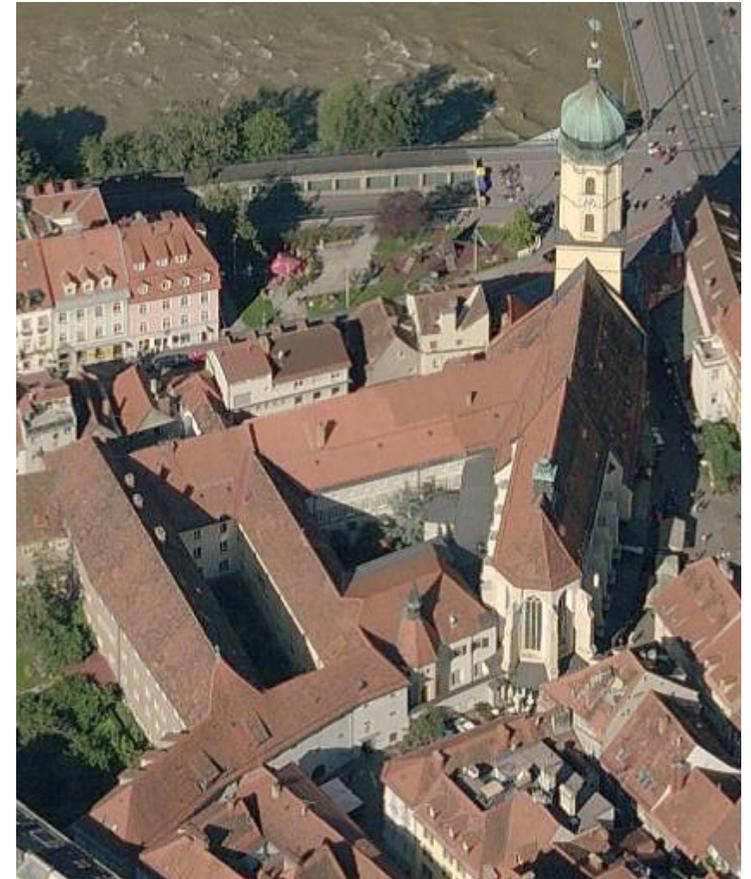
Public funds from the Federal Government of Styria (for thermal insulation, heat pump and solar system), BDA / National Heritage Agency of Austria (monument-related costs), Federal State of Styria (Revitalization Fund), additional funds from BMVIT, Federal State of Styria and City of Graz

## Timing

2001 to 2012

## Main goals

The overall goal was to reduce the CO<sub>2</sub> emissions to zero based on a new energy concept. In times of increasing price level for energy and environmental damages, the renovation of historical buildings is as important as the renovation of other buildings. Organizations in the area of monument protection from whole Europe, especially England and Germany, for this reason, dedicate themselves to the topic of energy efficiency and the alternatives in providing such individual buildings with energy. That high quality building renovation and the use of the sun for energy profit is also possible in densely





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built and historically valuable areas, shows the Franciscan Monastery in Graz very clearly. This case reflects that the discussion with the monument protection agency must be intensified. Many preservationists want to preserve the buildings as they are. However, the 21st century should include modern technology in a careful manner.

### Key-outputs

Due to the willingness of the public sector to provide money for change and the maintenance of valuable architecture with modern technology inside, the Franciscan Monastery buildings were turned into a modern conference centre. It represents an important example from an Austrian perspective.



### Key facts

- Reduction of energy losses mainly at the roof and wall, creation of unused buffer rooms, use of additional glass, facades, additional windows on the inner side achievement: 20-30% energy reduction
- Solar thermic and photovoltaic on the facade and the roofs (193m<sup>2</sup> and 1850m<sup>2</sup>) =Reduction of energy for warm water 50% and heating 50% additional energy is used in the nearby hotel.
- Combined heating system using solar energy, water from a spring and long distance heating as a back up system

### Reasons of interest

Good example for a historic ensemble with relevance for tourism (inner city, hotel attached) and energy efficient modernisation maintaining the cultural heritage.

Location: Bardejov, Slovakia



### Contacts & sources

<http://www.bardejov.sk/>

<http://www.e-bardejov.sk/unesco.php>

<http://whc.unesco.org/en/list/973>

*email: prednosta@bardejov.sk*



## 1.12. Bardejov, Slovakia. Living sustainability of protected HBA

Challenges and Problems related to management - Sustainable revitalization of historic building structure in the context of investment trends of the modern development:

- Modernization of city standard of protected building construction
- Preservation of lively urban functions in historic building structure
- Supporting the residential function (young families in particular) in historic building structure

### Financing - sources

- Tax system of the Slovak Republic
- Financial support from state budget of the Slovak Republic (subsidies)
- Own financial performance

### Timing

- 1986 - Award of The European Prize - Golden Medal of the Fund of ICOMOS for the results of preservation and restoration of rare cultural heritage.
- 2005 - Urban structure of the historical town center was approved to put on the List of World Natural and Cultural Heritage within UNESCO under the identification No: 973.

### Main goals

- Preservation of a unique historic center and its development into tourist center
- Development of spa tourism and harmonizing the interests of tourism and preservation of the HBA
- Harmonizing the interests of public and private actors while preserving the status of UNESCO Heritage site





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### Reasons of interest

Bardejov is an example of city with rich history and decline and shrinkage in 1990s due to its location on the East of Slovakia and decline of industry in the region. Tourism is one of the main economic fields of the region and UNESCO designation on the one hand is a great advantage (financial support, awareness, professionalism), but also a limit of development.



### Key facts

Preservation of UNESCO site is done by annual contribution from UNESCO organization together with state and municipal support.



### Players

- Lead Subject  
Municipality of Bardejov (with support of the Ministry of Culture of the Slovak Republic)
- Other involved subjects  
Municipality and its departments  
NGOs and Initiative action groups  
Regional Conservation Board of Presov Region  
Private entrepreneurs in field of tourism and public services  
Public institutions of culture (Saris museum, House of Polish-Slovak Cooperation, ...)

## Introduction

## 2. Implementation Tools

In all regions, the absence of data in general, and of disaggregated data at the local level has been a constant theme, and concern. A well-maintained, expansive and streamlined data ecosystem is of great importance when facing significant, systematic constraints on financial resources and the capacity to address these challenges. It can offset challenges and help anchor governmental policy to data and evidence. Integrated monitoring mechanisms built on indicators tied to strategic goals can help city managers steer policy in the direction that demands attention. A portfolio of evidence-based decision support tools can complement the capacity demands of the policymakers and provide critical support in urban planning and governance.

*The following BPs give suggestions about tentative instruments and tools to better use data and information, in order to drive management processes in a more efficient and effective way.*



Territorial strategies, policies and guidelines



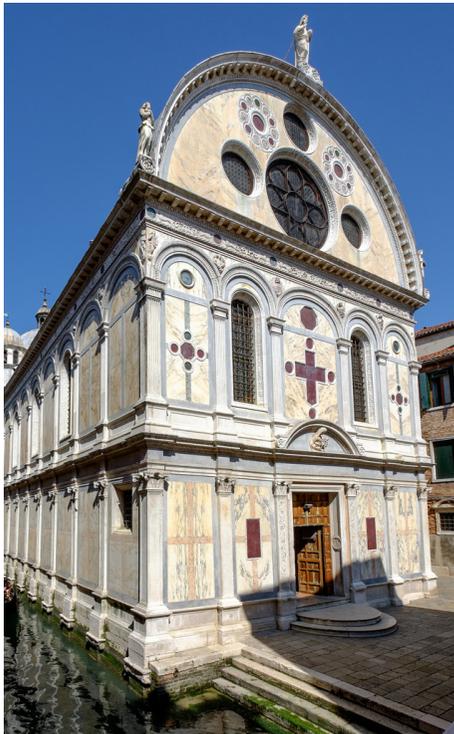
Implementation Tools



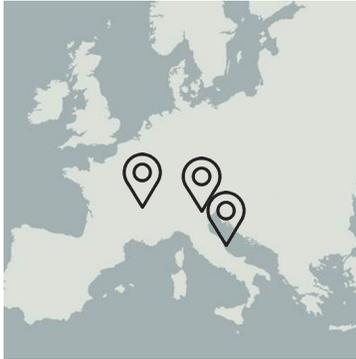
Financing procedures and funding search



Awareness improvement and proactive involvement



**Location:** Venice, Province,  
Marche



### Players

SiTI, Torino Polytechnic,  
United Nations Office for  
Disaster Risk Reduction  
Technische Universität Ber-  
lin, Consorzio per il Coor-  
dinamento delle Ricerche  
inerenti al Sistema La-  
gunare di Venezia, Service  
Départemental d'Incendie  
et de Secours des Alpes de  
Haute Provence

### Contacts & sources

[https://www.rescult-  
project.eu/](https://www.rescult-project.eu/)  
[migliorini@siti.polito.it](mailto:migliorini@siti.polito.it)  
[http://www.diati.polito.  
it/ricerca/progetti/sche-  
de/rescult](http://www.diati.polito.it/ricerca/progetti/schede/rescult)

## ResCult

## 2.1. Rescult - Increasing resi- lience of cultural heritage: a sup- porting decision tool for the safe- guarding of cultural assets.

The RESCULT project aims to build tools to increase the Civil Protection capacity to prevent/mitigate the impacts of natural disasters on Cultural Heritage by making available tools to strengthen the Member States' operations and multi-disciplinary cooperation in the field of emergency management.

### Financing

593.919,83€

### Timing

18 from Genuary 2017

### Main goals

The overall objective of RESCULT is to enhance the capability of Civil Protection (CP) to prevent and mitigate impacts of disasters on sites of Cultural Heritage. This will be done through the realization of an integrated European Interoperable Database (EID) for Cultural Heritage, designed to provide a unique framework for CP, national Ministries of CH, the European Union (EU), local authorities. Moreover, RESCULT will provide a disaster risk reduction strategy identifying tailored actions and investments to improve both prevention and resilience capacities.





Territorial strategies, policies and guidelines



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### Key-outputs

The project will realize an European georeferenced database of Cultural Heritage, composed in this way:

- Natura disaster register
- A monitoring and modelling platform about risk scenarios;
- 3D virtual models of works of art and monuments (focusing on three case studies), to support post-emergence restoration and to preserve digital memory in case of destruction and / or damage;
- a platform for population data acquisition.



### Key facts

Specifically, RESCULT is working on the following three overall objectives:

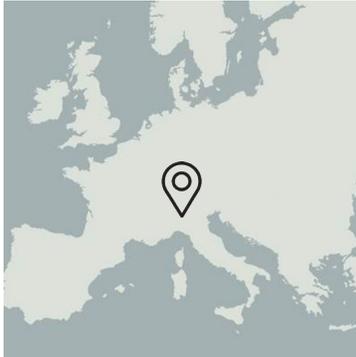
- Improvement of the Disaster Risk Reduction strategy (for prevention and resilience), according to the principles of Sendai Framework.
- Increase cooperation and interoperability between EU member states for the sake of protecting Cultural Heritage (information sharing, interoperable protocols, best practices dissemination, alignment with EU policies/standards)
- Enhancement of the capability of Civil Protection Bodies to understand/prevent/mitigate disasters impacts on Cultural Heritage.

### Reasons of interest

The database will allow the pooling of data and information in standard format to the stakeholders present in the area.

The main innovative goal is the possibility of integrating international data and information. That way the project will guarantee the territory safe both international and national.

Location: Milan, Italy



### Players

Metropolitana Milanese, Telecom Italia, Vitrociset Spa, Degremont, SITAEL, Systea, Omnitech, SIT, Brianzacque, Lavrimini, ETG, CNR, Milan Polytechnic, Bicocca University, Bicocca, Brescia University, Municipality of Milan

### Contacts & sources

<http://www.siti.polito.it/>



## 2.2. SWaRM - Smart Water Resource Management - Networks

The project is an innovative and real response to the complexity of the water issues in urban areas. The primary area of reference is “water resources management”, strongly interconnected with “waste management”. Some activities concerning the monitoring and management of extreme events also interface with the “Security of the territory” area, while others concerning data collection and storage, their diffusion and their interoperable use interface with the “Home Automation and Smart Grids” area.

### Financing

The project is financed by the Call “Smart Cities and Communities and social innovation” - MIUR n. 391/ RIC del 05.07.2012.  
€ 13.419.499,20

### Timing

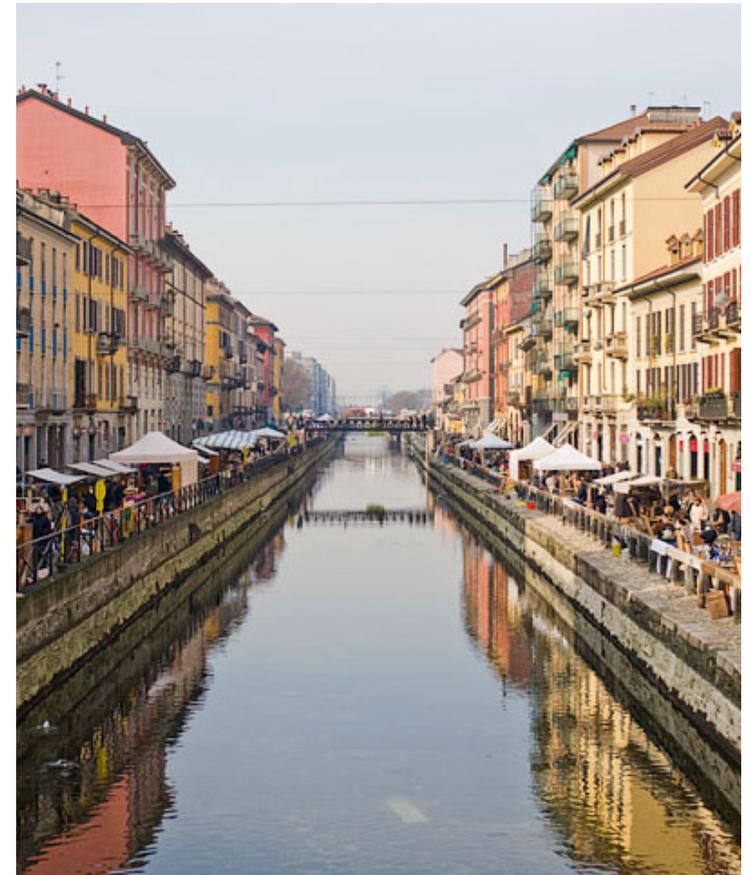
The project duration is 30 months.

### Main goals

SWARM-NET is focus on the development of an applicative WEBGIS solution able to integrate the water data of different operators. The platform help the authority to take some important decision in order to water issues in urban area.

In particular, the platform collects and analyzes data relating to domestic and irrigation consumption, urban wastewater collectors, rainwater for reuse, odorous effluents from water treatment plants, abnormal climatic events.

Data is detected by advanced field sensors and represented on GIS.





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### Key facts

The main actions of the project are:

- Monitoring water consumption
- Monitoring the efficient use of water resources (reuse, energy recovery, raw materials and biofuels)
- Analysis and minimization of negative impacts caused by the extreme climatic events or other negative event

### Key-outputs

#### WEBGIS PLATFORM

Impacts on the territory:

- Achieving sustainable economic quality
- Development of strategies for optimising water consumption
- Development of purification technologies with low environmental impact
- Development of technologies for the management of resources able to support and support decision makers and managers, encouraging the active involvement of citizens.



### Reasons of interest

The SWARM-NET can be an important example for the development of a WEBGIS platform, able to integrate data of different operators. The project also creates a virtual space where people, technicians or not, can see the state situation and its possible evolution.

Location: Acquila, Italy



### Players

Enea (Italian National Agency for New Technologies, Energy and Sustainable Economic Development), Municipality of L'Aquila, University of Rome "La Sapienza", AMA (Agenzia Mobilità Aquilana)

### Contacts & sources

[www.comune.laquila.gov.it/moduli/output\\_immagine.php?id=5978](http://www.comune.laquila.gov.it/moduli/output_immagine.php?id=5978)  
<https://sciforum.net/conference/ecsa-2/paper/3229>



## 2.3. SMART RING EXPERIENCE - L'AQUILA- Smart City Paradigm, based on the integration of mobility urban services and environmental monitoring

The project aimed at proposing a functional and energy-efficient city model along a 4–5-km circular path, the Smart Ring, around the historical center of L'Aquila, implemented the ICT (Information and Communication Technology), infrastructures for real-time monitoring of energetic, lighting, traffic-related and environmental parameters in connection with "green" technologies.

### Financing

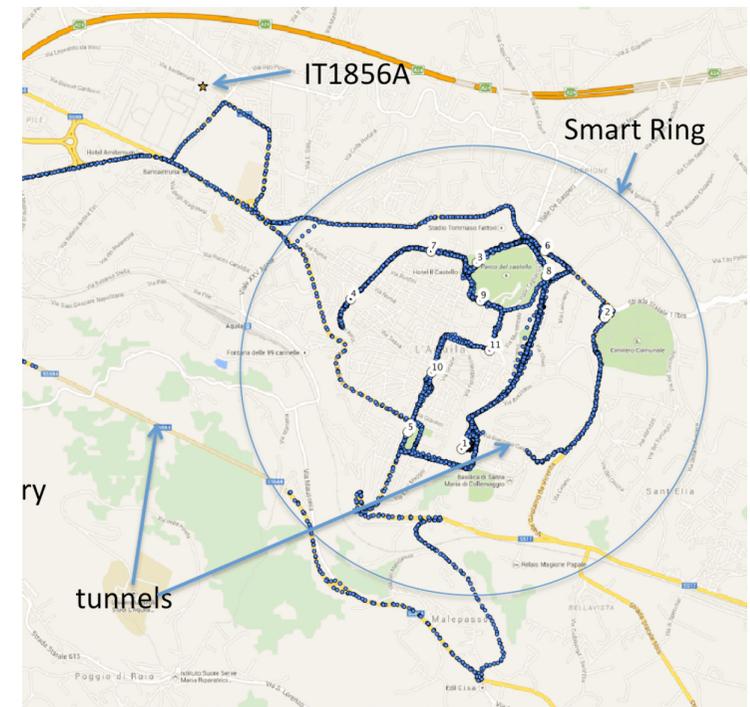
ENEA has signed a "Protocollo di Intesa" with the municipality of L'Aquila in 2010 for post-earthquake reconstruction activities. A draft of the "Smart Ring" project was prepared as part of this project. The project will be financed thanks to a part of the three-year budget foreseen by the 2010 Budget and used by ENEA and the CNR for the "sustainable" relaunch of Southern Italy.

### Timing

6 months (2014)

### Main goals

The final objective is to make urban networks and connected public services much more sustainable and efficient. The Smart Ring system aims to ensure not only automatic adjustment of street lighting but also constant air quality control. To achieve these results, integrated and synergistic interventions are applied:





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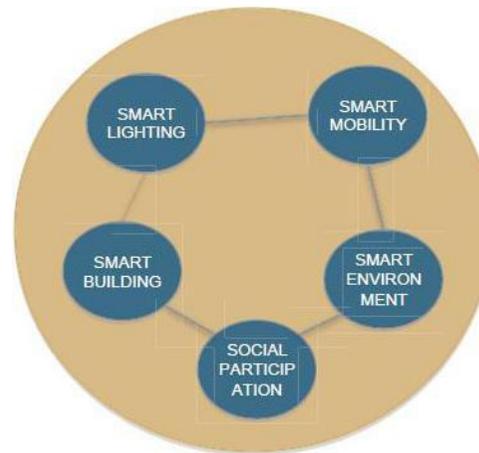


diagnostics and energy analysis of buildings; intelligent public lighting; intelligent public mobility; environmental monitoring; interactive communication systems for citizens.

### Key-outputs

Final Output of the project will be an insightful view of the status of the air potentially experienced by the Smartbus users, and indirectly, on the air quality along the Smart Ring track.

In particular, the system is able to provide more detailed and higher spatial and temporal indications on air quality and personal exposure, helping to support air quality monitoring programs.



### Key facts

The project focuses on the integration of the mobility urban public service “Smartbus”, an experimental on-demand public service electric bus based, with the multiparametric air quality low-cost electrochemical sensors NASUS IV, deployed to sample ambient air gas components (NO<sub>2</sub>, CO, SO<sub>2</sub>, H<sub>2</sub>S).

For five days (28-29 August 2014 and 1-3 September 2014), the multiparametric air quality sensor was installed inside the Smartbus, and measured air quality parameters during the Smartbus service.

The air quality data for NO<sub>2</sub>, CO, SO<sub>2</sub>, H<sub>2</sub>S, were collected, visualized and statistically analyzed also on the base of an Air Quality Index.

### Reasons of interest

The project, using ICT and mobility urban public, collects air quality data and supports the further development of such integrated sensor platforms as companion tools for air quality reference networks and urban integrated assessment methodologies, as well as citizen awareness purposes.

Location: Great Britain, UK



### Players

English Historic Towns  
Forum

### Contacts & sources

[http://www.historictownsforum.org/  
node/765](http://www.historictownsforum.org/node/765)

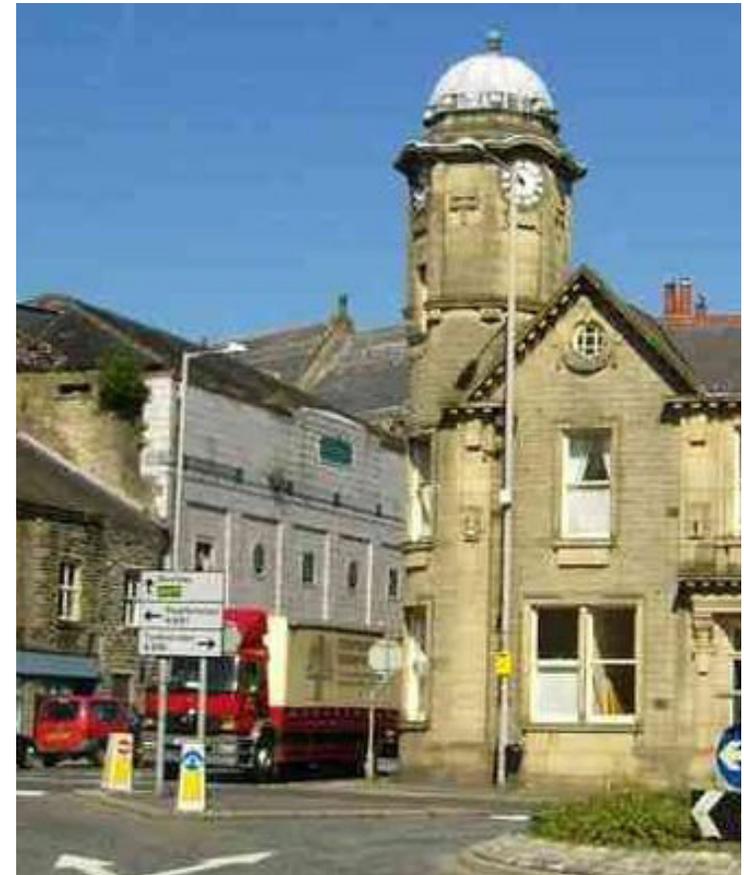


## 2.4. Conservation Area Management - A practical Guide

This publication gives easily accessible guidance and provides examples of what needs to be done to preserve and enhance areas of special architectural or historic interest. Although prepared within the English context, the Guide affirms that the document's principles and guidance are also entirely applicable to Scotland, Wales and Northern Ireland.

### Timing

The Guide was published in July 1998.





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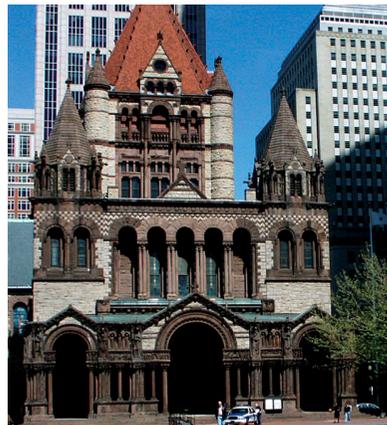
Implementation  
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Awareness  
improvement and  
proactive involvement

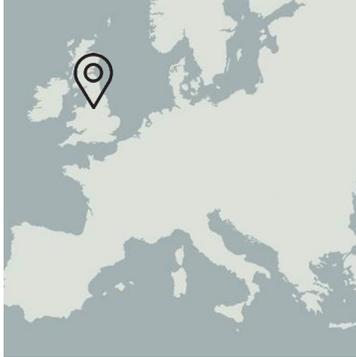


### Key facts

The document:

- assists local planning authority officers to manage and co-ordinate work in conservation areas
- helps elected members place conservation issues in their proper context
- enables students to understand the role of conservation areas in town planning
- is useful for members of the public by providing information on a subject which can easily become esoteric but which closely affects most people as they go about their daily lives.

Location: Great Britain, UK



### Players

Historic England, a public body that champions and protects England's historic places, looks after the historic environment, providing expert advice, helping people protect and care for it, and helping the public to understand and enjoy it.

### Contacts & sources

<https://content.historicengland.org.uk/images-books/publications/conservation-principles-sustainable-management-historic-environment/conservationprinciplespoliciesguidanceapr08web>.

## 2.5. Conservation principles policies and guidance for the sustainable management of the historic environment - Historic England association

The historic environment is central to England's cultural heritage and sense of identity, and hence a resource that should be sustained for the benefit of present of future generations. The Conservation Principles, Policies and Guidance are primarily intended to make a contribution to addressing the challenges of modernising heritage protection by proposing an integrated approach to making decisions, based on common process.

### Timing

The Guide was published in April 2008.

### Main goals

English Heritage's aim in this document is to set out a logical approach to making decisions and offering guidance about all aspects of the historic environment, and for reconciling its protection with the economic and social needs and aspirations of the people who live in it.

### Key-outputs

English Heritage Conservation Policies and Guidance (pages 51-63), a series of Policies specific to some common kinds of action, followed by associated Guidance on their interpretation. While some of these policies have a close relationship to particular principles, it is important that they are interpreted in the context of the Principles as a whole. These policies, which English Heritage will follow, are that:

- The conservation of significant places is founded on appropriate routine management and maintenance.
- Periodic renewal of elements of a significant place, intended or inherent in the design, is normally desirable unless any harm caused to heritage values would not be recovered over time.
- Repair necessary to sustain the heritage values of a significant place is normally desirable if:
  1. there is sufficient information comprehensively to understand the impact of the proposals on the significance of the place; and
  2. the long term consequences of the proposals can, from experience, be demonstrated to be benign, or the proposals are designed not to prejudice alternative solutions in the future; and
  3. the proposals are designed to avoid or minimise harm, if actions necessary to sustain particular heritage values tend to conflict.
- Intervention to increase knowledge of the past



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- Restoration
- New work and alteration
- Integrating conservation with other public interests

### Reasons of interest

The Conservation Principles, Policies and Guidance build on earlier statements and experience, to formalise an approach which takes account of a wide range of heritage values. They are intended to help everyone involved to take account of the diverse ways in which people value the historic environment as part of their cultural and natural heritage.



### Key facts

The Conservation Principles (pages 19-24) provide a comprehensive framework for the sustainable management of the historic environment, under six headlines:

- 1: The historic environment is a shared resource
- 2: Everyone should be able to participate in sustaining the historic environment
- 3: Understanding the significance of places is vital
- 4: Significant places should be managed to sustain their values
- 5: Decisions about change must be reasonable, transparent and consistent
- 6: Documenting and learning from decisions is essential

Understanding the values (pages 27-32) describes a range of heritage values, arranged in four groups, which may be attached to places. These are:

- Evidential value: the potential of a place to yield evidence about past human activity.
- Historical value: the ways in which past people, events and aspects of life can be connected through a place to the present - it tends to be illustrative or associative.
- Aesthetic value: the ways in which people draw sensory and intellectual stimulation from a place.
- Communal value: the meanings of a place for the people who relate to it, or for whom it figures in their collective experience or memory.

Location: n.a.



## Players

UNESCO

## Contacts & sources

Visit the official HUL pilot program website  
<http://www.historicurbanlandscape.com/>  
[whitrap-sh@foxmail.com](mailto:whitrap-sh@foxmail.com) - +86 21 65987687



## 2.6. THE HUL GUIDEBOOK - A practical guide to UNESCO's Recommendation on the Historic Urban Landscape

Around the world, national and local governments, as well as United Nations agencies, the World Bank and regional development banks, are searching for a more sustainable process of urban development that integrates environmental, social and cultural concerns into the planning, design and implementation of urban management programs. This is where the HUL Approach and the 2011 Recommendation on the Historic Urban Landscape come into action. The recommendation is a 'soft-law' to be implemented by UNESCO's individual Member States on a voluntary basis. The Recommendation does not replace existing doctrines or conservation approaches; rather, it is an additional tool providing us with a road map to integrate policies and practices of conservation of the built environment into the wider international goals of urban development, whilst respecting the values of different cultural contexts (UNESCO, 2011).

**Timing**  
2011

### Main goals

This Guidebook delivers a practical understanding of the Historic Urban Landscape (HUL) approach, along with information regarding its purpose and application. It is structured as a manual, that:

1. Equips readers with an introductory set of practical and theoretical information, including case studies of cities implementing the HUL Approach;
2. Brings together a list of experts and resources to assist with implementing the HUL Approach.

The Guidebook has been designed to assist stakeholders who wish to effectively deal with change in a way that harmonizes urban conservation with urban development and regeneration. In this sense, it is aimed at, but not limited to:

- local authorities

- government officials
- practitioners operating in the field of urban conservation or urban development
- researchers
- consultants
- University and training partners

The HUL approach requires us to take into account the local context of each historic city. Whilst this will result in different approaches to management for different cities, at a minimum six critical steps were recommended to facilitate the implementation of the HUL approach.

### THE SIX CRITICAL STEPS

1. To undertake comprehensive surveys and mapping of the city's natural, cultural and human resources;
2. To reach consensus using participatory planning and stakeholder consultations on what values to protect for transmission to future generations and to determine the attributes that carry these values;



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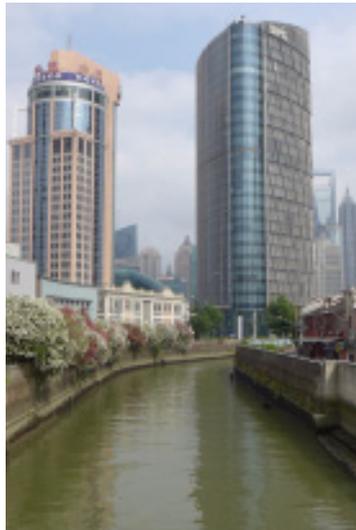
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3. To assess vulnerability of these attributes to socio-economic stresses and impacts of climate change;
4. To integrate urban heritage values and their vulnerability status into a wider framework of city development, which shall provide indications of areas of heritage sensitivity that require careful attention to planning, design and implementation of development projects;
5. To prioritize actions for conservation and development; and
6. To establish the appropriate partnerships and local management frameworks for each of the identified projects for conservation and development, as well as to develop mechanisms for the coordination of the various activities between different actors, both public and private. (UNESCO, 2011)



### Key facts

The procedure is summarized in “The HUL Toolkit”. The successful management of urban heritage in complex environments demands a robust and continually evolving toolkit.

It should include a range of interdisciplinary and innovative tools, which can be organised into four different categories, each of which will be discussed by presenting a list of established approaches, practices and instruments.

It should be emphasised that for urban heritage management to succeed, the policies and actions in these four categories need to be adapted for local application and addressed simultaneously, as they are interdependent.

### Key-outputs

The HUL approach has been tested in many UNESCO locations, with different slant and specific objectives according to the local needs and features.

Among others, here is interesting presenting the following ones:

- Pilot application of the HUL principles in the historic city centre of Naples (Italy): One of the main goals in approaching the management strategies for Naples was to understand the relationship of the city (site) with its environment and all the issues affecting the historical city centre

## THE HUL GUIDEBOOK - A practical guide to UNESCO's Recommendation on the Historic Urban Landscape

were addressed at larger scales (local, metropolitan, provincial and regional). On the one hand, the buffer zone of the site was partially revised and enlarged and, on the other hand, the enhancement of the site was approached by looking at the network of the existing and the potential relationships with other cultural meanings of areas in the region.

- Pilot application of the HUL principles in Ballarat (Australia): A key objective of Ballarat's implementation of the HUL model has been to build a framework for ensuring sustainable change. The pilot project stage of HUL in Ballarat included integrating the approach in Today, Tomorrow, Together: The Ballarat Strategy - Our Vision for 2040. Importantly, and consistent with HUL principles, the Strategy was organised as an all of community initiative through an engagement program titled Ballarat Imagine - the largest 'community conversation' ever undertaken by the City of Ballarat. Complementing the Ballarat Strategy was a range of collaborations and events, including two well attended international symposiums featuring notable practitioners as well as experts from Asia, Australia and the Pacific. Aligned with these events were a number of community forums that ensured community participation as well as community access to the process. The long-term implications of HUL can be found in the implementation of People, Culture and Place: a new heritage plan for Ballarat 2016-2030 which sets out the application of the HUL approach in the city. It ties in with the development of a series of integrated and participatory Local Area Plans and the inclusion of HUL concepts into local planning policy regimes.

### Reasons of interest

The Historic Urban Landscape (HUL) Approach is holistic and interdisciplinary. It addresses the inclusive management of heritage resources in dynamic and constantly changing environments, aimed at guiding change in historic cities. It is based on the recognition and identification of a layering and interconnection of natural and cultural, tangible and intangible, international and local values present in any city. According to the HUL approach, these values should be taken as a point of departure in the overall management and development of the city. This handbook offers a practical and effective help in understanding the HUL approach and applying it in the daily management of a HBA.



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### IMPLEMENTATION TOOLS

Online



Local area participation, advisory committees.



### KNOWLEDGE AND PLANNING TOOLS

Community research, federated initiatives, mapping, consultation, accessibility



Decision support and local area info kits and briefs.



Regulatory



Statutory planning and enforcement.



Financial



Grants, low-interest loans and private/public partnerships.



**Community engagement tools** should empower a diverse cross-section of stakeholders to identify key values in their urban areas, develop visions, set goals, and agree on actions to safeguard their heritage and promote sustainable development. These tools should facilitate intercultural dialogue by learning from communities about their histories, traditions, values, needs and aspirations and by facilitating mediation and negotiation between conflicting interests and groups.



**Knowledge and Planning tools** should help protect the integrity and authenticity of the attributes of urban heritage. They should permit the recognition of cultural significance and diversity, and provide for the monitoring and management of change to improve the quality of life and urban space. Consideration should be given to the mapping of cultural and natural features, while heritage, social and environmental impact assessments should be used to support sustainability and continuity in planning and design.



**Regulatory systems** could include special ordinances, acts or decrees to manage tangible and intangible components of the urban heritage, including their social and environmental values. Traditional and customary systems should be recognised and reinforced as necessary.



**Financial tools** should aim to improve urban areas while safeguarding their heritage values. They should aim to build capacity and support innovative income-generating development rooted in tradition. In addition to government and global funds from international agencies, financial tools should be deployed to promote private investment at the local level. Micro-credit and other flexible financing mechanisms to support local enterprise, as well as a variety of models of public-private partnerships, are also central to making the HUL approach financially sustainable.

Location: Bradford, UK



### Players

City of Bradford Metropolitan District Council

### Contacts & sources

[www.bradford.gov.uk/conservation](http://www.bradford.gov.uk/conservation)

## 2.7. The Bradford Authenticity Matrix

The developed and tested matrix represents an objective way of measuring change and promoting active area management.

### Timing

2001 to 2006

### Main goals

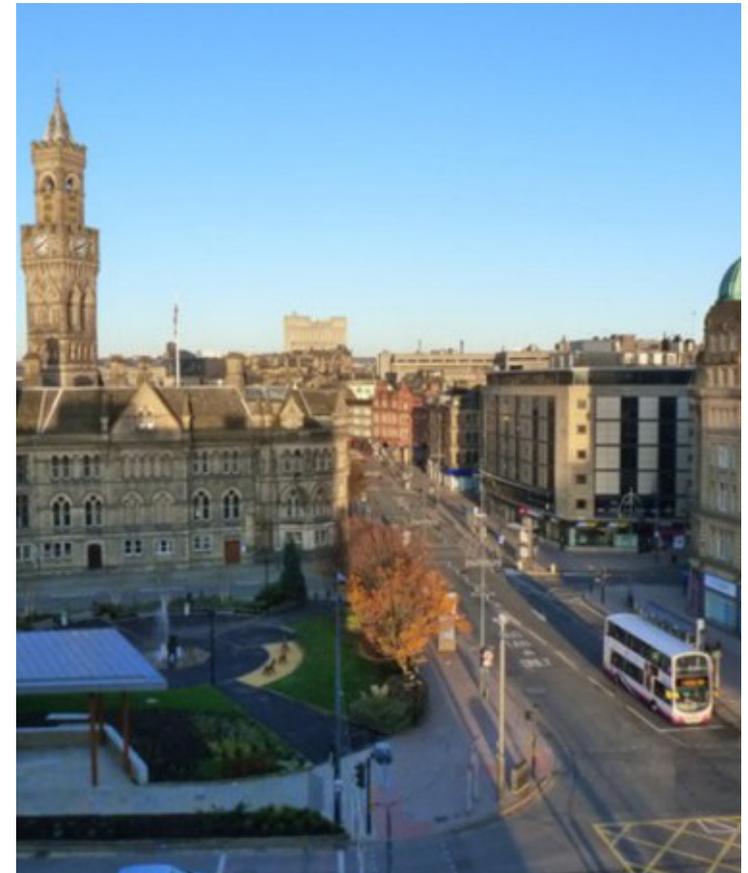
The authenticity matrix is aimed to an assessment of the condition of individual elements of buildings in conservation areas.

The most visible areas of each building are photographed, and the authenticity of individual elements scored on a spreadsheet.

Percentage measures of authenticity for houses, streets and areas can then be generated and compared.

### Key-outputs

The process has taken about five years to complete. It was carried out in-house, retaining detailed local knowledge within the council. The resulting information has already helped identify locations where Article 4 Directions would be appropriate, and is being used to support an application to the Heritage Lottery Fund for a Townscape Heritage Initiative grant for public-realm improvements in Keighley. Although the system took significant time to set up, staff have





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found it straightforward to maintain, and invaluable for managing the city's conservation areas. The review of character appraisals will begin in 2010.

### Reasons of interest

The matrix is part of an exemplary appraisal practice which will help to improve service delivery, raise awareness and understanding, about the special character of the conservation area, improve decision making so that all repair, development and alteration result in a positive contribution to the character of the place helping local communities on how to best maintain the character of their historic properties.



### Key facts

By 2005, conservation area assessments had been carried out throughout the city, and work began on character appraisals for each. These depended on an innovative methodology, the 'authenticity matrix'. The condition of roofs, chimney stacks, walls, windows, doors, shopfronts and boundary walls for each pre-1956 building was assessed, and given a score based on the number of original features retained. This was then used to calculate the overall level of authenticity for each conservation area. Information can also be compared within and between areas, allowing comparisons of rates and patterns of change. Each area's overall authenticity rating is prominently displayed, along with a SWOT (strengths, weaknesses, opportunities and threats) analysis, in its eight-page appraisal document. These are placed on the council's website. As part of the process, guidance on repairs is made available, monthly public conservation forums are held, environmental improvements are carried out and an enforcement officer deals with any unauthorised changes to listed buildings. The data makes a key contribution to Bradford's conservation area character appraisals; these quote the resulting overall authenticity rating for each area. Revisited every five years, the detailed figures give an accurate picture of rates and patterns of change. The initial process takes several days in each conservation area, and occupies several members of staff, but once complete it is straightforward to maintain.

## Introduction

### 3. Financing procedures and founding search:

**Public funding from national/regional/local sources** Most funding for heritage preservation stems from national or regional/local sources.

The break down between these levels will vary according to the national organization of a country: in centralist countries the national budget will be the most important source, whereas federal states are more likely to attribute such funding responsibilities and decision power to the regional or local level. At the same time, the more local the funding source, the better it may cater to specific local needs and preferences; however, this can also work at the expense of the overall rationality and cross-regional comparability of the funding decisions. Moreover, the national or regional funding capabilities will often be correlated with the economic conditions and wellbeing; accordingly, the poorer a given nation, region or commune is, the less funding resources it will generally be able to allocate to heritage preservation - as indeed also to other types of expenditure. Given the multiplicity of possible constellations, this overview cannot deal with them in detail. It is however important to underline the importance of public funding sources within each individual country, and to stress the need for their systematic exploration; this should be the first “port of call” for any initiative aiming at heritage preservation. De facto, it will also be important even if international funding sources are being primarily targeted, as they will often become accessible only if the national or regional authorities signal their active support or at least give a green light.

Moreover, it is important again to underline that in particular O&M costs will frequently need to be supported by national/regional/local sources, in addition to any own revenues generated on the sites. Thus, while investment support may move “upwards” to national or even international sources, the coverage of O&M costs will most frequently move “downwards” to regional or local sources. This also means that in periods of economic instability, the O&M costs may well become the first ones not be covered anymore; hence the need to dimension heritage investment in a way to ensure a sufficient O&M coverage thereafter.

#### **Private funding sources**

In many countries heritage preservation is seen as primarily or exclusively a public task (apart from efforts by the possibly private owners of the monuments and sites). But this attitude may conceal the possibility for wider private funding which could complement and in some cases replace public funding. While Anglo-Saxon countries have developed a stronger tradition of also mobilizing private funding, impressive cases of mécénat can also be found in other countries. In principle, five types of mainly private funding sources can be distinguished (though they will in practice overlap to some degree). Defining what could be the “optimal mix” between them and with public sources will depend a lot on the specificities of the site or monument:

##### **a) Funding by private owner’s resources:**

If the site or monument is owned privately then its preservation costs should also be (largely) borne by the owner. This is in particular the case if the monument is to be used privately, as is the case e.g. for certain historic town or farm houses, castles, etc. However, it may well be that the owners cannot support all the cost for a monument whose preservation is also considered in the public cultural interest. Such may in particular be the case for the exterior of historic buildings (e.g. facades), or for the corresponding gardens and parks, but it can also apply to interiors. In such case the complementary support by public or third-party private funding sources can be justified; however it should be accompanied and normally indeed conditional



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upon making the supported site or monument accessible to the public, at least to a degree which reasonably balances the private owners' privacy with the public interest in acceding to subsidized heritage. For instance parts of castles or palaces may be opened to the public, and so can be parks at certain times, etc. A similar approach should be used e.g. for churches/worship places of heritage value, monasteries, etc.

#### **b) Funding by third-party private sources:**

In a number of countries private or semi-private institutions or foundations exist which support heritage-related expenditure. Such is the case e.g. for the UK or the Irish National Trusts, as well as for their continental equivalents or for cultural foundations, such as the well-known Calouste Gulbenkian Foundation in Portugal, or the Fondazione Cariplo in Italy. Some major private companies also have their own foundation or support programme, which often includes heritage/cultural or artistic activities, notably if there is some geographical or thematic link to the company's activities; admittedly, the current economic and financial situation may weigh on the generosity of some of these schemes. Other support can be mobilized at the specific local level, e.g. through donations by local business or through a call for donations or sponsorships to the local population or to local charities. The new technique of "cloud financing" may further open new perspectives, on the condition that the promoters are technically sophisticated and transparent to make their case well known. In some countries, the emigrant population living in diaspora and possibly with higher incomes than in their country of origin can be mobilized to support heritage related investment; this could also be tried with (repeat) tourist visitors or with cities maintaining twinning arrangement ties. Some tourism destinations also levy specific tourism taxes (e.g. the German concept of Kurtaxe on overnight stays) which may support heritage activities.

#### **c) In-kind contributions from third-party sources:**

It can be easier for some companies to support a project not by a financial grant, but instead by directly providing relevant goods or services needed in the preservation effort. For instance a local architect office may help in planning the restoration, a local building company may provide for part of the works, or a printing company may contribute to the catalogues for an exhibition. While the potential of such in-kind support should not be underestimated, it needs to be accompanied by a good quality control of the works and by keeping product placement ambitions within reasonable limits.

#### **d) Private funding sources for O&M costs:**

Ideally, all O&M costs should be paid by the users of the sites or monuments, like the owners and visitors of museums, castles etc. However, this is not always feasible if the number of visitors is insufficient over the year, or if cost-covering entrance fees would become prohibitive for less well-to-do visitors. Accordingly, an approach similar to the one used for most public transport schemes needs to be undertaken, i.e. that a sizeable part of the O&M costs is provided from sources other than conventional user fees. In particular for heritage-related monuments, this may first of all consist in finding new uses for the heritage sites, which permit to levy non-conventional user fees from new customer groups. Museums e.g. can develop their book/souvenir shops or catering facilities (including through outsourcing them via rental contracts), historic buildings can rent out part of the facilities for parties, marriage ceremonies or other appropriate social events. Various concepts mentioned in b) and c) above (sponsorships, in-kind contributions) can also be used in this context. While there may exist an inherent danger of "overcommercialisation" of heritage sites, it is probably also fair to say that the potential for developing a reasonable degree of revenue-generating activities remains more often underexploited.

#### e) Use of heritage sites and monuments for new private use:

In appropriate cases the investment and/or the O&M costs of a heritage site can be largely or fully covered by new owners or users of the site, if it can be dedicated to a new use. Indeed, not all heritage buildings need to serve as museums or quasi-museums. In appropriate cases they can be transformed e.g. into hotels, office buildings or apartments. The Spanish Paradores or Portuguese Pousadas hotel chains are examples, so are the transformation of industrial heritage, harbour granaries or military barracks into office or apartment buildings. In appropriate cases this can be implemented through PPP-type structures (public-private partnerships).

There is thus a wide array of private funding possibilities and their concrete use will depend on the specific monument, its heritage value, national legislation - but also on the imagination and innovation of the respective owners and interested associations. There is an increasing body of case-studies on when the use made of private funding sources in heritage monuments and sites has been successfully implemented - but also in some cases failed. The diversity of outcomes provides good rationale to further analyse and document such case studies, to distill the “dos and don’ts” and thus to provide a targeted body of evidence to the owners and managers of other heritage sites, and in particular to those of sites so far under neglect.

Market-based incentives offer a powerful reason for the public at large to retain, care for, invest in, and responsibly rehabilitate historic buildings. Though historic preservation has sometimes acquired a bad public image as a being overly regulatory and authoritarian, with no real means of rewarding those who follow imposed requirements, financial incentives offer a positive and more broadly defensible reason for the public to get involved with responsible preservation activities, other than the fact that they are being compelled to do so by the government.

Around the world, a wide variety of incentive programs has been created to motivate historic property owners and investors to retain and maintain their buildings and sites. Reflecting their diverse origins, enabling legislations, financial systems, and the different roles that governments, private interests, and the public at large play in protecting heritage properties in these nations, these programs are predictably far-ranging and dissimilar.

The primary types of financial incentives to be examined in this paper are:

**Income Tax Deductions, Credits, and Rebates for property investment** - In its most typical form, this type of incentive allows a property owner or other interested party to be compensated for rehabilitation costs associated with construction work on his building. The incentive could be given in the form of a tax “credit,” which is a dollar-for-dollar diminishment of the amount of tax owed equal to the amount or percentage of the expenditure allowable, or a “deduction” which is a diminishment of the amount of “taxable income” on which the investor’s tax is calculated.

**Tax Incentives for Donations to Heritage Organizations** - This incentive works to the advantage of heritage organizations (typically non-profit corporations), and individuals or organizations who donate to the heritage organizations. Donations to some heritage organizations and charities can be deducted from the donor’s total taxable income by the full amount, a percentage, or some fixed amount. In other cases, donating money or property to a heritage organization may free the donor from paying some portion of another tax, such as inheritance or capital gains tax.

**Easements** - A form of donation, easements allow property owners to receive tax deductions or other financial benefits in exchange for agreeing to a diminishment of their property rights. A typical form is a “façade easement,” in which property owners agree not to alter some aspect of the exterior of their property by “donating” that right to a non-profit organization or government body in perpetuity. The donation can never be rescinded, and



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the non-profit is then charged with enforcing the agreement over the entire life of the property.

**Tax Exemptions for Heritage Organizations** - In addition to being eligible to receive tax-deductible donations, many heritage organizations are also free from paying some taxes or duties, such as property, land, or inheritance tax.

**Property Tax Abatements** - Typically offered at the local level, this incentive permits historic property owners or investors to claim a full or partial reduction, freeze, or deferment of property taxes or rates, sometimes to help control the costs of a rehabilitation which has increased a property's value. The incentive could be achieved either by adjusting the property's mill rate, or by assessing it at a lower value than would be otherwise applicable.

**Sales Tax Concessions or Rebates** - Some countries allow the sale of building materials or services relating to historic property maintenance to require no sales tax, or reduced sales tax. This is the case in some European nations which assess a standard VAT (Value Added Tax) for all transactions within the nation's boundaries.

**Other Tax Benefits** - Less common varieties of tax benefits for historic properties include exemption from Stamp Duty and accelerated depreciation for heritage buildings.

**Grants** - The most common form of government funding is grant assistance, taking the form of either entitlement grants (which are guaranteed as-of-right to every interested party who meets certain set qualifications), or discretionary/performance grants (which are only given to certain applicants based on their quality of application, their financial need, the amount of funds available, or other factors).

**Loans** - These funds can be made available either in the form of low interest or no interest loans directly from the government, or as an interest-rate subsidy on a loan from a private lender.

**Direct Subsidies for Private Heritage Organizations** - Many heritage organizations, although they are private, receive funding directly from the government. Sometimes they then pass the governmental funding onto individuals or other private organizations in the form of grants or loans, acting as an intermediary and manager for the government money.

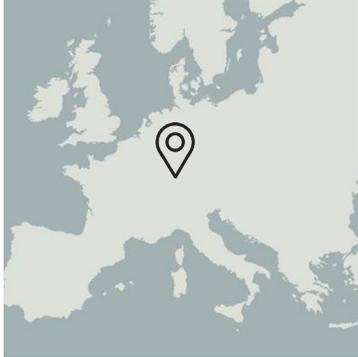
**Other Programs** - Some programs exist which fit none of these categories but do have some measurable positive effect on heritage investment. In many cases, these programs are not necessarily intended to fund heritage, but cause secondary financial benefits for heritage properties.

In addition to this public initiatives, there are many other way to finance conservation and enhancement of a HBA:

- Lotterie
- Raccolte fondi dal basso
- Investitori privati: grandi società, fondi, fondazioni, partnership PP

Contrary to what the presence of two banking institutions in the cooperation initiative may suggest, the desirable funding for most of the selected monuments should NOT be simply based on (repayable) loans, but rather on a combination with grants, donations, revenues and other non-repayable funding streams. Accordingly, this document aims at providing such an overview of available funding sources, at a public and private as well as at a national and international level. The "optimal" funding mix for each project will vary, but it will generally consist of a combination of the funding sources discussed below in some further detail. Such combination of various funding sources is all the more necessary as most individual sources will not be able to finance the entire cost of the conservation measures.

Location: Federal Republic



### Players

The group of experts for urban conservation is a body appointed by the Federal Minister for the Environment, Nature Conservation, Building and Nuclear Safety to provide technical support for the Urban Heritage Listing program.

## 3.1 Urban Planning Heritage Program

In many cities, not only individual buildings are worth preserving, but entire streets, squares, historic city centres or urban quarters. The task of urban conservation is to preserve these historical ensembles with their special character and in their entirety. The federal and state program “Urban Heritage Protection” supports overall measures to preserve in particular historic city centres.

### Financing

In 2017, the Federal Government will provide the respective provinces with financial assistance amounting to approx. 110 million euros (commitment framework) ready. Overall, the federal government provided around 2.328 billion euros for the program in the new federal states from 1991 to the end of 2016. Since the program was first introduced in the old federal states in 2009, it will total around EUR 290 million up to and including 2016.

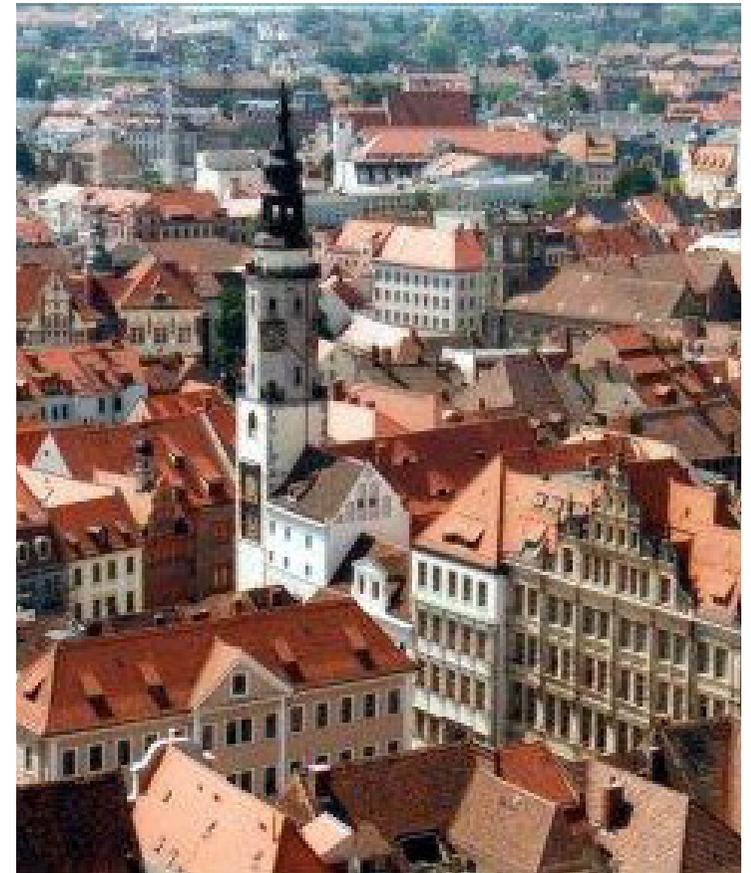
### Timing

6 months (2014)

### Main goals

The task of urban conservation is to preserve not only individual buildings but also historical ensembles (entire streets, squares, historic city centres or urban quarters) with their special character and in their entirety.

The urban planning heritage program is intended to preserve the urban and cultural history of valuable urban centers and areas with monuments of monumental value in their structural unity and to further





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develop them in the future.

### Reasons of interest

The description of the funding opportunities and regulations in the German preservation system shows opportunities for co-financing preservation in other regions in Europe.

### Contacts & sources

[http://www.staedtebaufoerderung.info/StBauF/DE/Programm/StaedtebaulicherDenkmalschutz/StaedtebaulicherDenkmalschutz\\_node.html](http://www.staedtebaufoerderung.info/StBauF/DE/Programm/StaedtebaulicherDenkmalschutz/StaedtebaulicherDenkmalschutz_node.html)

[http://www.staedtebaufoerderung.info/StBauF/DE/Programm/StaedtebaulicherDenkmalschutz/Praxis/praxis\\_node.html](http://www.staedtebaufoerderung.info/StBauF/DE/Programm/StaedtebaulicherDenkmalschutz/Praxis/praxis_node.html)

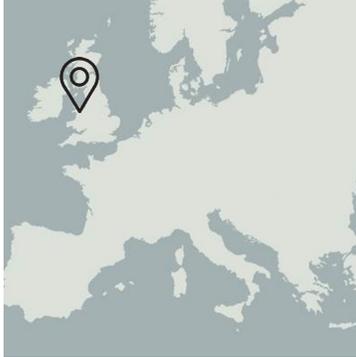


### Key facts

From the program launch in 1991 through 2016, 331 measures were supported in a total of 241 cities in the so called “new federal states” so that they could preserve, revitalize and develop their inner-city area monuments for future generations. In 2009, the program was also introduced in the other provinces. So far, 301 measures have been funded in 288 cities.

In 2015, 155 municipalities in the new federal states and 211 municipalities in the old federal states were supported in the Urban Heritage Listing program.

Location: Liverpool – UK



Players

Contacts & sources

[www.english-heritage.org.uk](http://www.english-heritage.org.uk)  
[www.hlf.org.uk](http://www.hlf.org.uk)



## 3.2. The Ropewalk Initiatives in Liverpool - UK

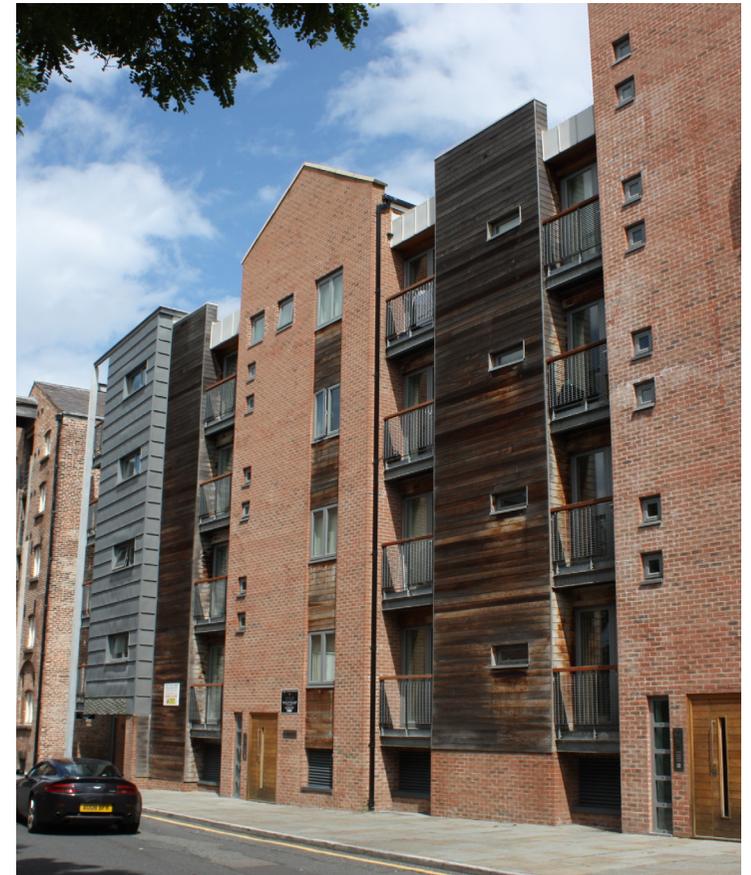
Urgent Works Notices are being used alongside grants and private investment to rescue buildings in historic Seel Street.

### Key-outputs

Many of the historic buildings in the Ropewalks, Liverpool, are being regenerated.

### Reasons of interest

Concerted statutory action by a local authority, coupled with financial incentives and grant aid from various sources, can transform entire neighbourhoods.





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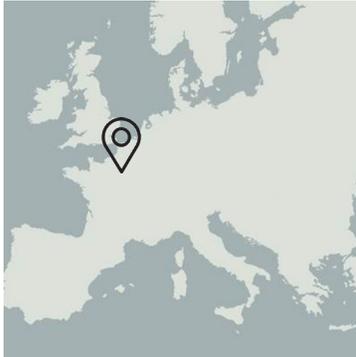
### Key facts

After years of dereliction, much of the area became fashionable in the 1990s. Shops, bars and nightclubs opened, but commercial regeneration stalled as speculative landlords purchased derelict properties, then found it more profitable to sell them on than to refurbish them.

Intensive public investment started in 1989. Regeneration restarted, resulting in major changes to the Ropewalks as a whole. But in Seel Street, for example, some of the most fashionable venues in the city stood cheek-by-jowl with derelict historic buildings. In 2005 owners initially responded poorly to a £4.5 million Townscape Heritage Initiative scheme, although 20 buildings have now benefited from £1.4 million in grants from the Heritage Lottery Fund, the North West Regional Development Agency, Liverpool City Council and English Heritage. These are expected to lever in over £12 million of private investment.

Grants are not the only incentive. Urgent Works Notices and Section 215 Notices have been served on the owners of many buildings. These have stimulated immediate repairs and applications for grant aid from previously uninterested landlords; in many cases, the negotiations preceding the making of the order were enough to stimulate action. Where there is no response, the local authority can step in, carry out the works and take legal action on the owner to recoup the cost of works carried out. The resulting income can then be directed at further such actions, helping to support a virtuous cycle of grant aid and enforcement.

Location: Paris, France



### Players

The public body responsible, under the supervision of the Ministry of Culture, for managing the country's 100 most famous monuments has launched a campaign, in collaboration with the My Mayor Company website (French crowdfunding platform).

### Contacts & sources

<https://www.tomshw.it/crowdfunding-restauration-monumenti-mossagionale-43168>



## 3.3. Crowdfunding for Paris Monuments

This experiment is an enterprise to raise funds through crowd funding, an online site that solicits small individual donations. Cultural institutions such as the Centre des Monuments Nationaux are moving towards new ways of raising part of the funds.

### Timing

Call for projects of the Ministry of Culture and Communication Innovative Cultural Digital Services 2012.

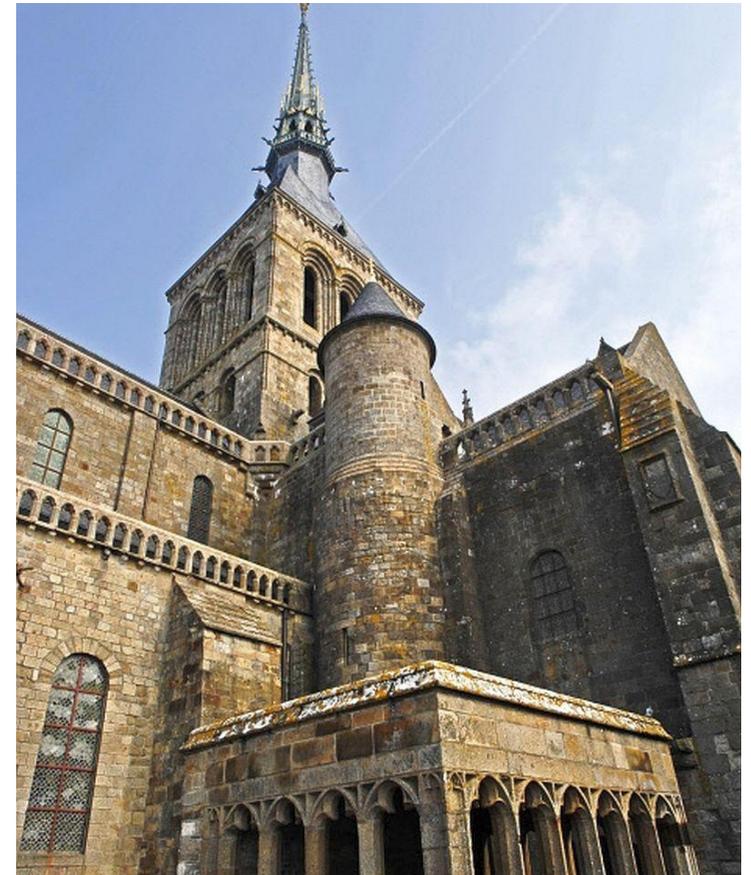
### Main goals

This popular financing will contribute to the restoration of 4 French monuments: the Mont-Saint-Michel Abbey, the Panthéon, the national domain of Saint-Cloud and the castle and ramparts of the city of Carcassonne. This form of collection is a means of raising funds to complement the institution's budget and other public resources, thus allowing for broader restoration and improvement programmes.

### Key-outputs

The largest collection is the restoration of the Pantheon in Paris, managed by the National Monuments Centre. The Agency started with the modest objective of collecting 5,000 euro for the Pantheon. In two months it raised almost 60,000 euros from 1,123 customers collected on MyMajorCompany compared to 19 million euros of the project.

In this case donors may benefit from a tax deduction or receive recognition and facilitation for cultural





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events. The trust and respect of citizens towards the public administration has been the main key to the success of the fundraising campaigns for the restoration interventions.

An analysis of the crowdfunding operations (29) proposed by the, Ulule and KissKissBank platforms shows that:

- the total amount of funds raised exceeds the objectives set by the project promoters
- the operations that generated the largest collections are not necessarily those that concern the most famous monuments .
- each project has raised on average more than 14,000 euro
- each sponsor made a donation of 88 euros on average



### Key facts

The initiative consists of creating a website where

- Customers (mainly businesses, entrepreneurs, financial foundations) have the opportunity to sponsor the restoration and maintenance of a specific monument and make a proposal to the responsible government.

- Donors receive subsidies.
- Governments receive funding at below market interest rates for the restoration of monuments.
- Tourists benefit from the restructuring.

The idea is not to finance the entire amount of the work, but to make individuals part of the project. People have the opportunity to regain their assets.

### Reasons of interest

The crowdfunding campaign undertaken by France to raise the funds needed for the restoration of some of the most important mountains in the country is a particularly interesting example of how crowdfunding is a useful alternative source of funding for art and culture, focusing on public-private collaboration.

Location:



### Players

Loveltaly operates in collaboration with Italian ministries, superintendents for Italian monuments, fine arts and museums, local and national authorities, church leaders and higher institutions of learning including Italian and international universities and academies.

### Contacts & sources

<https://loveitaly.org/>

## 3.5. Loveltaly! Crowdfunding experience

Loveltaly is a non-profit organization dedicated to the preservation and appreciation of Italy's unique cultural heritage and the world's greatest living museum. The association is the first of its kind to support conservation projects throughout Italy.

### Financing

Loveltaly was founded by LVenture Group, a holding company quoted on the Italian Stock Market that participates in digital start-up businesses, and a group of enthusiasts from diverse professional backgrounds who are passionate about Italy's cultural heritage and seek to make the conservation of Italy's outstanding artistic treasures their main focus.

### Timing

2014-ongoing

### Main goals

The association uses crowdfunding platform, the most powerful and innovative tool available to better connect with local and international communities. By implementing new forms of communications it is possible to reach out and engage new audiences. Additionally, the association has set-up mechanisms to accept private and corporate funding in Italy but also through 501(c)3 organization in the United States, American Friends of Loveltaly.





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### Key-outputs

Collaborative institutions for common projects:

- Superintendence of Pompeii
- Villa Farnesina and the Lincean Academy - Rome
- National Institute for Conservation and Restoration (ISCR) of Rome
- National Gallery of Ancient Art in the Corsini Palace in Rome
- Sapienza University of Rome
- International Friends of the Certosa of Capri
- Pinacoteca of San Severino Marche

Funded restoration's projects:

- The Certosa of Capri, Capri (NA)
- Palatine Hill Excavation, Rome
- sarcophagus of Thiasus Marino, Rome
- "The Ecstasy of St. Teresa", Rome
- The Golden Age Bedroom, Pompei



### Key facts

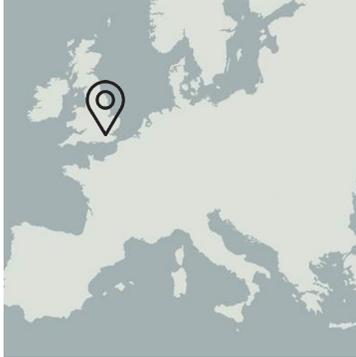
In 2016 the Loveltaly Young section was created. Teams of university students from various backgrounds together with the UNESCO Youth Committee came together to explore ways to promote a cultural site. A room at the Villa Farnesina in Rome was chosen for this initiative. The compound, one of the most regal in Rome, belongs to the Accademia dei Lincei, one of the most antique academies in the world.

Loveltaly Young wants to restore the room to its original beauty and open it to the public. Participants of the "Loveltaly Challenge" will compete to design and develop a project for the promotion and enhancement of the room with a given budget. They will work in collaboration with Villa Farnesina and the Accademia dei Lincei. The winning team of the 'Challenge' will be awarded a prize and will oversee the project to its final phase. This is Revolutionary! Allowing young students to participate in promoting conservation in Italy's cultural heritage environment.

### Reasons of interest

The association exploits the potential of crowdfunding to finance the redevelopment of Italian beauty and bring people closer to culture. The association will change the approach towards the protection of artistic heritage and make the relationship with public administrations more flexible.

Location: London (UK)



### Players

The Crown Estate  
Howard de Walden  
Shaftesbury  
The Portman Estate  
Grosvenor Britain & Ireland  
Greater London Authority  
London Wildlife Trust  
Technical partner

### Contacts & sources

<http://www.wildwestend.london/vision>



## 3.6. Wild West End Initiative - London (UK)

Wild West End, a unique collaboration by The Crown Estate and other core West End property owners to promote green infrastructure in the capital, with the Mayor of London and London Wildlife Trust as strategic partners and technical input from Arup. This is the first city centre ecology project of its kind worldwide, conceived and driven forward by an industry partnership of this sort. Wild West End is a unique partnership between The Crown Estate, Grosvenor Britain & Ireland, The Portman Estate, Howard de Walden and Shaftesbury.





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### Main goals

Through our shared vision, they aim to:

- Improve the wellbeing of residents, workers and visitors by increasing connections to green space and nature and contributing to improvements in local air quality
- Enhance biodiversity and ecological connectivity
- Raise awareness and promote the benefits of green infrastructure to inspire others to participate and create similar initiatives.



### Key facts

To achieve their vision, they will:

- Run Wild West End and individual partner community and occupier greening projects
- Promote access to local green space
- Improve walking/cycling connections between green spaces through way-finding
- Establish 2016/17 baseline area and condition of green space
- Target establishment of new areas of green space and habitat structures
- Target and maintain multi-functional value of new and existing green space. Green space to deliver a minimum of two functions (refer value table).
- Contribute to growth of green corridor (corridor defined as 100 square metres of green space every 100m)
- Establish baseline of birds and bats in the area and target an observed increase
- Promote value of green infrastructure at Wild West End partner events
- Promote green infrastructure via website, media and external events
- Collate data on value of green infrastructure to support the business case
- Provide public access to Wild West End green space data

# DT121- Best practices inventory

## Introduction

### 4. Awareness improvement and proactive involvement

We must be more proactive when planning the future shape and form of our villages, towns and cities and the government, institutions and professions should lead a revolution to make this happen. We need a radical step change in collective expectations and actions to improve standards within the everyday built environment. Our planning system has become too reactive and relies on development control, which forces local authority planners to spend their time firefighting rather than thinking creatively about the future shape and form of villages, towns and cities. Everything is open to negotiation for every planning application and, as a result, huge amounts of time and resources are spent on issues that could have been predetermined by a collective vision shaped in collaboration with local communities, neighbourhood forums and investors. Proactive planning would free up valuable time for local authority planners to develop masterplans and design codes which are supported by local communities, whilst reinvigorating the planning profession and its public perception.

*The following BPs give suggestions about way to involve effectively the stakeholders in regeneration projects of HBAs*



Territorial strategies, policies and guidelines



Implementation Tools



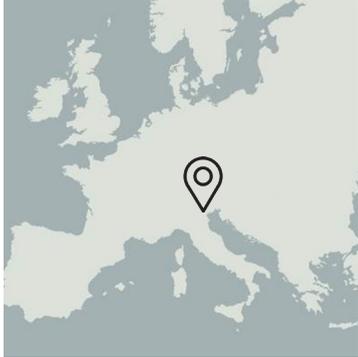
Financing procedures and funding search



Awareness improvement and proactive involvement



Location: Treviso?



### Players

The LIFE+ PERHT project involves a cooperation between local authorities (Municipality of Treviso), transport service providers (ACTT Treviso) and engineering and research companies (MemEx - Livorno, Softeco Sismat - Genova).

### Contacts & sources



## 4.1. PERHT

### “Parking green services for better environment in historic towns”

PERHT addresses the very important issue of people and goods mobility by the implementation of appropriate and innovative “green” parking schemes and associated measures in small-/mid-size historic towns such as Treviso, where the impacts of individual and commercial traffic are particularly high.

### Financing

The project is part-funded by the EC under the LIFE+ Program - the EU financial instrument for the environment - financed among some hundred European projects selected in response to LIFE+ 2011 call.

### Timing

Launched in October 2012 and running until March 2016

### Main goals

Reducing private traffic by favoring modal shift towards Public Transport and Bike Sharing service.  
Reducing the congestion of private and commercial traffic by reduction of the total number of car and vans in the historical center.

### Key-outputs

Perht has allowed the implementation of:  
Bike sharing service: 22 dedicated stations, with 120 bicycles available, 1,500 registered users, 36 thousand uses and 45 thousand kilometres travelled in the historic center in 2015.





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- Bike station: 3 public parking lots dedicated to private bikes.
- Infomobility (TreviMove APP): consultations of information services related to urban public transport (bus schedules, routes, reading and purchasing of tickets), consultations on bike sharing and parking.
- Electric car: installation of three small electric charging stations.
- Load stop: installation of sensors to control the loading/unloading stop in the historic centre. The computer system is able to allow real-time monitoring of the stopover.
- Taxi service: demand Responsive Bus Service, managed through an App, dedicated to Saturday evenings.



### Key facts

#### ■ Sustainable Policies

Reducing the congestion of private and commercial traffic by reduction of the total number of car and vans in the historical center.

#### ■ Informed Travellers

Providing users with comprehensive online information to make more sustainable travel choices.

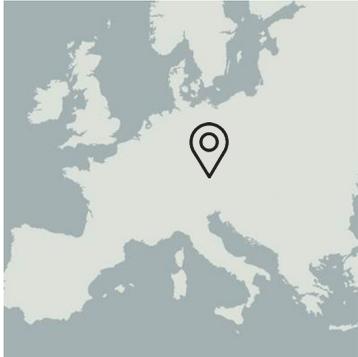
#### ■ Green Vehicles

Promoting the use of green “vehicles” ( electric / hybrid ) and fleets in urban distribution.

#### ■ Flexible Transport

Promoting flexible transport service and bike use for people mobility.

Location: Langquaid, Germany



## Players

City council  
Private planning office

## Contacts & sources

<http://www.mittelbayerische.de/region/kelheim/gemeinden/langquaid/standorte-fuer-windrad-und-photovoltaik-21089-art1235275.html>  
<http://www.langquaid.de/>  
<http://www.langquaid.de/leben-und-tourismus/tourismus/geschichte/#>  
<http://www.langquaid.de/wirtschaft-und-bauen/umwelt-klimaschutz/modellprojekt/>



## 4.2. Awareness rising and LAND USE PLANNING for WISE USE OF RENEWABLE ENERGY IN LANGQUAID, GERMANY

### Financing

Bavarian ministry of environment, model project for sustainability, participation and energy planning

Overall:  
66.050,90, 80% funded by the bavarian state

### Timing

2012 to 2015

### Main goals

List of objectives

Langquaid aims to increase its endeavours in energy saving, energy efficiency, and alternative energy sources. Through the German legislation a SEA becomes mandatory. However, in addition to solely focusing on the SEA, Langquaid envisions its strategies to be in line with other communal aspects such as nature and wildlife conservation, biodiversity, community planning, historic preservation, and livelihood. Therefore, Langquaid extended the SEA to a new model, the Integrated Energy Land Use Plan (ELUP), which incorporated and reconciled citizens, social

mobilization, and landscape and spatial development in planning processes and investigated opportunities to deal with challenges through communal planning instruments.

### Key-outputs

List of results and products:

- Energy planning is implemented in coherence with natural, social and historic planning issues.
- Participatory processes were integrated in the local zoning plan
- Basing zoning plans on this integrated model reduces the risk of conflicts in the future
- Early integration of environmental issues
- Better development and consideration of alternatives for different AES
- Improvement of screening and scoping process, including climate change issues
- Enhanced local commitment



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### Reasons of interest

The database will allow the pooling of data and information in standard format to the stakeholders present in the area.

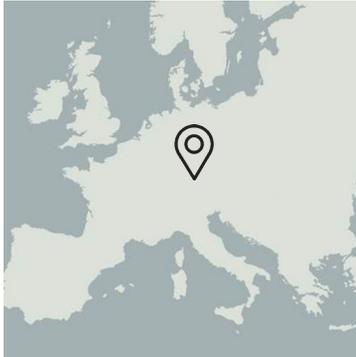
The main innovative goal is the possibility of integrating international data and information. That way the project will guarantee the territory safe both international and national.



### Key facts

List of main actions and activities  
Public information meetings on various forms of renewable energy  
Questionnaire on energy consumption for the households and their preferences for sources of renewable energy (e.g. wind turbines, photovoltaic)  
The market town of Langquaid developed a model for an integrated energy land use plan, leading to an improved local zoning plan. The early integration of environmental issues into the planning process increases the commitment and engagement of the local population in climate change understanding and adaptation. The objective of generating a citizen-oriented and -based energy land use plan and the incorporation of this plan into long-term regional planning was fully achieved.

Location: Würzburg, Germany



## Players

City of Würzburg and  
Department of Envi-  
ronment and Climate  
protection

## Contacts & sources

[http://www.wuerzburg.de/de/buerger/aemter-a-z-oeffnungszeiten/addr\\_/Fachbereich\\_Umwelt\\_und\\_Klimaschutz/index.html?detID=401147](http://www.wuerzburg.de/de/buerger/aemter-a-z-oeffnungszeiten/addr_/Fachbereich_Umwelt_und_Klimaschutz/index.html?detID=401147)

[klimaschutz@stadt.wuerzburg.de](mailto:klimaschutz@stadt.wuerzburg.de)



# 4.3. Würzburg 2030 - Guidelines and Goals for an environmental and climate conscious City of Würzburg

The project provides the international database development, based on the INSPIRE legislation, able to support the European strategies in Danube Region (Danube Strategy). In particular, the project pursues the protection and the security of Cultural Heritage. The project will allow the drafting of some statistics about the Cultural Heritage's risk exposure, in particular earthquakes, floods and fires.

## Financing

Up to 500 million euro for renovation and technological improvement until 2030

By the city budget

## Timing

Period of project development and implementation started 2010 and will end 2030.

The concept defines phases until 2015, from 2015 to 2030

## Main goals

Information and Awareness rising  
Positive nudges like a special designed climate logo for existing buildings  
Historic buildings should - under consideration of their beauty and historic characteristic and quality - contribute to energy efficiency standards.

## Key-outputs

List of results and products





Territorial strategies, policies and guidelines



Implementation Tools



Financing procedures and funding search



Awareness improvement and proactive involvement



### Reasons of interest

Best practise for the development of goals, feasible measures for implementation and political implementation of both. Clear targets, clear program for the administration, more than just visions.



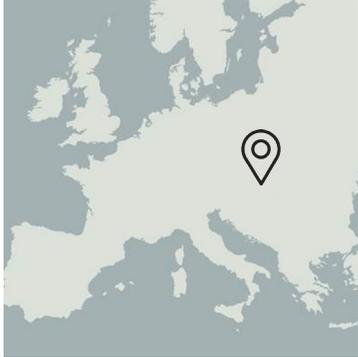
### Key facts

List of main actions and activities:

Start: inventory and comparison of the age of buildings and the required energy consumption revealed a clear relationship. This data were made available for possible Investors.

- Step Information campaign for private Owners
- Concept for the energetic improvement of historic buildings owned by the city to show private owners opportunities and to have a blue print to copy.
  - Guideline on the best practise for historic buildings with practical examples
  - Establishment of a consulting office to find the best solution for individual problems, to help with financing, planning and implementation
  - Implementation by the city owned municipal energy supplier as many intelligent Energy management systems as possible (such as Smart metering, Plug wise, Digital energy)

Location: Trenčín, Slovakia



## Players

Lead Subject  
Urban safety centre (NGO)

Other involved subjects  
The city of Trenčín  
Slovak University of Technology in Bratislava  
Local active persons

## Contacts & sources

[www.urbiswatch.sk](http://www.urbiswatch.sk)  
[www.spectra-perseus.org](http://www.spectra-perseus.org)



## 4.4. Urbis Watch and small urban interventions in the city of Trenčín - Slovakia

Together with Nitra and Bratislava, Trenčín belongs to the oldest Slovak cities, chronicled as early as in the 11th century. Its strategic location near three Carpathian mountain passes on the crossroads of commercial routes, has always determined the character of the city as a significant landmark.

### Financing

Amount

Approx. 5 000,- €

Sources

Ministry of Interior of SR

### Timing

Project was implemented within two years period in 2 steps. First year activities were focused on collecting the problems and sensitive locations by citizens in the city of Trenčín and next year aimed on small urban interventions dealing with defined problems and locations.

### Main goals

- Identification of problems and problematic locations in the city from citizens point of view
- Creating and collecting ideas of urban intervention defined by experts
- Increasing of citizens awareness about city development issues with demonstration of effective, innovative and simple interventions dealing with current problems in the environment of the city.





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### Key-outputs

<http://uw.spectra-perseus.org/Trencin>

### Reasons of interest

Simple web-based tool for managing geo-referenced data about current challenges in the city as the supporting tool for stakeholder participation on managing processes in term of sustainable management of city environment.



### Key facts

Creation web-based tool managing geo-referencing data about current challenges in the city providing by relevant stakeholders

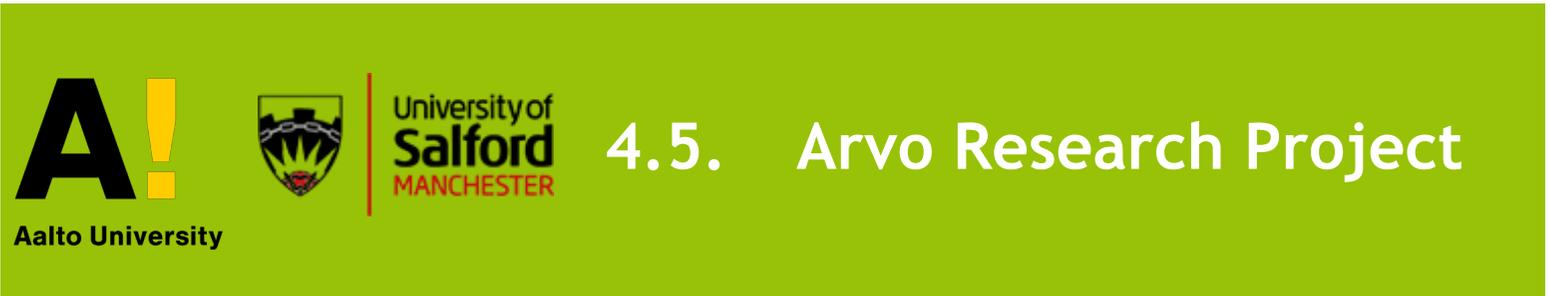


### Players

The research team includes academics from two universities:  
Aalto University  
University of Salford

### Contacts & sources

<http://arvo.aalto.fi/publications.html>



The ARVO research project introduced lean thinking into the field of built environment. Lean management offers a new way of thinking to the professionals in the built environment. A central idea why lean differs from the traditional Western approach is the waste thinking.

### Financing

The ARVO project was funded by Finnish Funding Agency of Technology and Innovation (TEKES). The project was part of Spaces and Places programme. The other funding and co-operation organisations were Senaatti Properties, Ovenia Ltd., Skanska Ltd., and Ilmarinen Mutual Pension Insurance Company.

### Timing

from September 2009 to June 2012

### Main goals

The ARVO project had three aims:

- To develop customer value assessment methods in real estate business
- To evaluate the value creation of service processes in real estate business organisations from customer value perspective
- To develop a leanREB model to support the value creation in real estate business

### Key-outputs

The findings related to each aim are briefly presented.

- Customer value assessment methods in ARVO
- Improvement potential in value creation
- The LeanREB model

### CUSTOMER VALUE ASSESSMENT METHODS IN ARVO

In ARVO research project a method called the Kano model (e.g. Kano et al. 1984, Löfgren and Witell 2008) was used to define customer value. The Kano model explains how customer perceives the value of products or services through five dimensions:

**Must-be dimension:** The must-be dimension describes the basic level for product and service attributes. If the basic level is not achieved, the customer will not be satisfied. The must-be attributes cannot increase customer satisfaction, i.e. they cannot provide richer customer value.

**Attractive dimension:** As an opposite to must-be attributes, attractive attributes can provide richer customer value. However, they cannot cause customer dissatisfaction, because the customer does not expect them.

**The-more-the-better dimension:** These attributes are simple - the more there is such an attribute, the more satisfied the customer will be. Because customers expect these attributes, they can also cause dissatisfaction when the expectations are not fulfilled.



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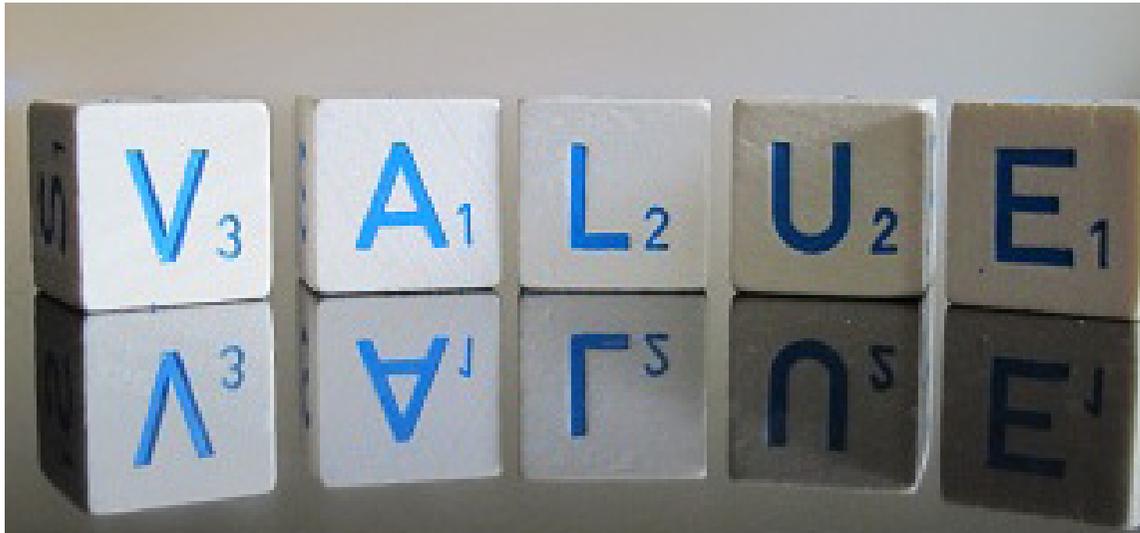
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**Reverse dimension:** Reverse attributes are opposite to the-more-the-better attributes. The more there is such an attribute, the more dissatisfied the customer will be.

**Indifferent dimension:** Attributes in this dimension do not impact customer satisfaction, i.e., they do not cause satisfaction or dissatisfaction. Therefore, organisations do not have to invest in attributes in this dimension.

Kano model and its five dimensions (adopted from Jylhä and Junnila 2012)

For more information on the Kano model, please see ARVO's final report (see Publications). The other assessment methods are described in more detail in Enomaa's Master's (see Publications).



### Key facts

- WP1: the value creation was studied in case studies. Each case followed the same research process including three phases. First, based on customer interviews and questionnaire survey it was studied, how customers were perceiving value. After this, the employees of the organisations, who were responsible of providing identified customer value, described how value is currently created in their value creation processes. Finally, case-specific lean policies were discussed to improve the value creation.
- WP2: it was simulated how the value creation in the cases could be enhanced.
- Finally, based on the previous case studies, the leanREB model was developed to pinpoint the current issues that are blocking the value creation in WP 3.
- WP 4: Publications.

## [Arvo Research Project]

### IMPROVEMENT POTENTIAL IN VALUE CREATION

The second aim of the ARVO project refers to the actual value creation. The current value creation was studied and visualised in order to understand what happens between the input and output. Based on the analysis, six typical sources of waste were identified that were interrupting the value creation. If the below described sources of waste could be eliminated or minimised, REB organisations could gain impressive efficiency gains.

**Sub-process focus:** According to the case studies, the value creation is organised through sub-processes. In each sub-process the person (or team) in charge tries to optimise their operations without knowing how the changes and improvements in their sub-process impact on the other sub-processes. After each sub-process, the value creation is handed from one person to another. Because of all the hand overs, the flow is disturbed.

**Price minimisation:** Cost minimisation has a central role in lean and this is typically achieved through waste elimination. The case studies show that cost minimisation has also a dominant role in the REB sector, but the way to reduce costs is based on bidding, not on waste minimisation. Through bidding, the actual costs are not necessarily decreased but merely the prices, because waste is not minimised.

**Unmanaged information flows:** Without information it would be challenging to create customer value. Currently, information is not well managed and paradoxically, there is a constant lack of information and constant overload of information.

**True customer value stays uncaptured:** Most likely the most difficult part in lean management is to capture customer value. This was also recognised in the case studies and there were many excuses why the customer value stays uncaptured.

**The unlevelled workload of employees:** According to the findings of the case studies, the workload of the employees is not levelled. The employees have a constant overload of work, which creates frustration. The workload of employees could be levelled by minimising the waste activities that the employees are currently doing, i.e., activities that should not be done at the first place.

**Continuous improvements are challenging to realise:** In lean management, improvements are done constantly in the daily working. In the case studies, employees created best practices in order to improve their own daily working. However, these practices were not shared systematically. Because of this, the wheel was invented over and over again and it wasted resources and time. The improvements that are aimed for sharing are usually done in projects. Lean management suggests that improvements are integrated to the daily working, not done in separate projects.

For more information, please see the final report of the ARVO project and the scientific papers (Publications).

### THE LEANREB MODEL

The leanREB model is based on the six sources of waste described above. The model describes three major shifts that assist to enhance the value creation. The shifts are

The shift from sub-process optimisation to the entire value creation process

The shift from price minimisation to costs minimisation with the help of waste reduction

The shift from collecting data to utilising it



To implement the shifts, the three key concepts of lean management should be taken into use: waste thinking, customer value approach and the strive to do improvements continuously.

The leanREB model is described in more detail in the final report

### Reasons of interest

The ARVO research project introduces the lean thinking into the field of real estate business (REB). Lean management has been successfully used in other industries, such as in car industry, health care, and construction, but its utilisation in the REB sector is limited. Lean management offers a new approach to create customer value and to improve the value creation processes through waste thinking.

The research project aimed (1) to develop customer value assessment methods in real estate business, (2) to evaluate the value creation of service processes in real estate business organisations from customer value perspective, and (3) to develop a leanREB model to support the value creation in real estate business.

The methods developed and tested could be useful to improve the governance's abilities in managing the real estate interventions inside HBAs.

Location: Ireland



### Players

Irish Walled Towns Network (IWTN). The Network is formally linked to European Walled Towns.

### Contacts & sources

[www.heritagecouncil.ie/irish-walled-towns/welcome/](http://www.heritagecouncil.ie/irish-walled-towns/welcome/).

IWTN Project Manager  
Liam Mannix at [lmannix@heritagecouncil.ie](mailto:lmannix@heritagecouncil.ie) or 056 777 0777.



## 4.6. The IWTN Initiatives “Helping towns help themselves”

Formed by The Heritage Council in 2005, the IWTN’s role is to help make the walled towns of Ireland better places in which to live, work and visit. It is a methodology that in 2013 resulted in the network winning the most prestigious award in European Heritage, the European Union Prize for Cultural Heritage/Europa Nostra Award. It is also an approach that despite limited funding has ensured consistently impressive results.

### Financing

Existing annual budget of €260,000 and one employee

### Timing

2005-ongoing

### Main goals

IWTN’s approach is to work with local communities and to empower them through funding, training and guidance. The method to activate local energies in towns preservation requires people in the public, private, and community sectors of one town to work shoulder to shoulder. Aided by mentors in heritage tourism, planning/architecture, public realm, roads/parking, and retail, residents come together to analyse the town’s problems and come up with practical solutions. The workshops and resulting plan did not focus on outside agencies. Rather, it concentrated on what the town could do to help itself.

### Key-outputs

Some notable achievements include:

1. Growing to an active membership of 28 walled

towns across Ireland.

2. Providing €6.35 million to conserve Ireland’s medieval urban heritage since 2007.

3. Saving the best preserved abandoned medieval town in either Ireland or the UK. By working in partnership with the local community they have managed to save much of what remained in Rindoon, Co. Roscommon. The site now attracts over 8,000 visitors annually.

4. Developing a new format for town regeneration plans. The ‘Solving our own problems’ system allows the creation of a high quality action plan within a short time span. The format involves mentors in retail, tourism, heritage, public realm, and traffic management working together with locals from the public, private, and community sectors. The first plan was done for Carrick-on-Suir.

5. This year, 48,000 people attended IWTN funded festivals and events. Since 2007, €737,000 has been provided for community festivals around the country.

6. Youghal Walled Towns Day is Ireland’s largest free medieval festival. Each year it attracts 8,000 people into the town. In 2008, a KPMG report estimated that the economic benefit to the town from this one



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### Key facts

Currently, the IWTN help its 28 member towns through the following ways:

- Providing grants for medieval town wall conservation
- Providing grants for community festivals and heritage interpretation
- Training community groups on how best to use their place's heritage for the benefit of those who live there
- Coordinating research with third level institutes and publishing user friendly self-help documents

day was €480,000. If it wasn't for the IWTN allocation this festival would not be possible.

7. Since 2011, almost 900 people have attended 33 IWTN training events. The education programme focuses on conservation, planning/town centre economy, heritage tourism and community group development. Its aim is to help people make better decisions about their towns.

8. In the past four years we have published guidance documents on heritage interpretation, community festivals, town regeneration and town wall conservation. All are free to download on [www.heritagecouncil.ie](http://www.heritagecouncil.ie)

9. In 2013, tourist website was shortlisted for an Eircom Spider Award.



### Reasons of interest

A great advantage of this technique is that the individuals who will have to implement the plan have a sense of ownership over it. This increases the likelihood of implementation. Another benefit of getting the people of the town to work together is that misunderstandings between the public, private and community sectors can be reduced. As a result, trust is increased and expectations moderated. This in turn led to more reasonable solutions and a fostering of teamwork.

Location:



### Contacts & sources

<https://www.nps.gov/training/hptc/>



## 4.7. The Historic Preservation Training Center (HPTC) of National Park Service (USA)

The HPTC utilizes historic preservation projects as our main vehicle for teaching preservation philosophy, building crafts, building technology, and project management skills. Our experiential learning approach emphasizes flexibility in addressing the unknown conditions encountered during the project and ensures that the goals of preservation are met.

The HPTC was founded in 1977 to meet the growing demand for craft skills development for NPS employees tasked with preserving the thousands of historic structures within the National Park System. In 1995, the Center joined the NPS Training and Development Division to become one of four NPS Training Centers.

The HPTC is currently located in Frederick, Maryland. The headquarters/administrative office is located within the Monocacy National Battlefield at the historic Gambrill House.

The Shop is located in the historic Jenkins Cannery building in downtown Frederick. The HPTC staff and trainees currently total approximately 70.

### Main goals

The Historic Preservation Training Center in undertaking its mission is:

- Training Preservation Craftspeople
- Preserving Historic Resources Today
- Promoting Historic Preservation as the Key to the Future





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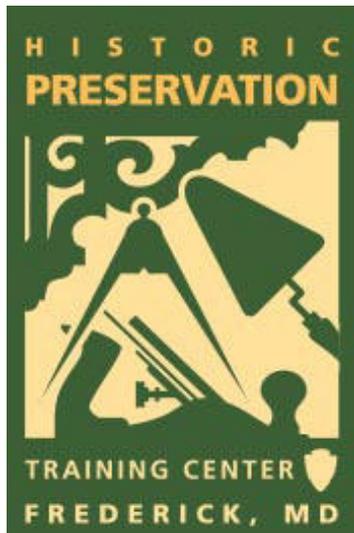
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### Key facts

The major programs and services provided by the HPTC are:

- A three year training program for the NPS Exhibit and Preservation Specialists
- Services for the treatment of NPS, Federal, and State historic properties
- Extensive outreach training programs aimed at building the skills of personnel responsible for the maintenance and preservation of historic properties



# 5 Suggestions



## 5.1 LEED Certification

### LEED is green building

LEED, or Leadership in Energy and Environmental Design, is the most widely used green building rating system in the world. Available for virtually all building, community and home project types, LEED provides a framework to create healthy, highly efficient and cost-saving green buildings. LEED certification is a globally recognized symbol of sustainability achievement.

**2.2 million +**

square feet is LEED certified every day with more than 92,000 projects using LEED.

### Flexible

LEED works for all building types anywhere. LEED is in over 165 countries and territories.

### Sustainable

LEED buildings save energy, water, resources, generate less waste and support human health.

### Value

LEED buildings attract tenants, cost less to operate and boost employee productivity and retention.





## 5.2 Envision Protocol



# Envision helps individuals play important roles in creating sustainable infrastructure

Envision is an indispensable tool that can be used for infrastructure projects of all types, sizes, complexities, and locations. It provides valuable insights that help the project design team achieve higher levels of sustainability at each step of the process—from assessing costs and benefits over the project lifecycle to evaluating environmental benefits and using outcome-based objectives.

Envision also allows individuals to increase the level of personal impact they can have on projects' sustainability—and in the process, increase their value to not only their organization but their broader community as well. They also have the opportunity, once they have been trained in the use of Envision, to be credentialed by ISI as an Envision Sustainability Professional (ENV SP), an indication of their commitment to excellence in their profession.

