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# D.T2.6.2 - FINAL EVALUATION OF PILOTS

## Italian contribution on Palazzo Santa Croce

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VERSION 2

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## 1. Introduction

According to the application form, in the Final evaluation of pilots, impacts and benefits of the pilots will be evaluated, lessons learned, and sustainability and transferability issues discussed.

IER will prepare the document's final version based on inputs from all PPs in charge of pilots. They will prepare pilot project final reports in English language or in national languages with extensive EN summary. The outline is based on "Output Fact Sheet: Pilot actions ", that should be prepared for each pilot project until the end of the project. In the extensive EN summary all questions raised in the outline should be answered.

## 2. The outline

Within the WP T2, pilots have been testing the implementation of 1 selected financial instrument and its evaluation after 6 months. Pilots were also supposed to validate the usefulness of the toolset through its pilot implementation in different local contexts. In this way, WP T2 contributes to the main objective of the project (foster integrated heritage management) and all 3 specific objectives related to different facets of this management.

In Table 1 below, all the expected deliverables related to WP T2 pilot actions are presented.

Table 1: WP T2 deliverables

Pilot action	Deliverables
Pomeranian Dukes' Castle in Szczecin (LP - WESTPOM)	D.T2.2.1 Selection of the external consultant to support the pilot D.T2.2.2 Previous documents and current practice in management analysis D.T2.2.3 Establishment and work with the stakeholder's group D.T2.2.4 Preparation of the management plan, including public presentation D.T2.2.5 Pilot implementation of 1 selected financial instrument (FI) from the plan will take place. Results from this FI testing and overall management plan implementation will be evaluated after 6 months
Vodnik Homestead in Ljubljana (PP3 - RRA LUR)	D.T2.3.1 Analysis of the situation in the field of financing (financial instruments) in Vodnik Homestead D.T2.3.1 Involvement of a stakeholder group (from the public and private sector) for financing D.T2.3.3 Feasibility study for the Vodnik Homestead for the future use of financial instruments D.T2.3.4 Pilot implementation of 1 selected financial instrument (FI) from the feasibility study will take place and be evaluated after 6 months
Rikard Benčić complex in	D.T2.4.2 Establishment and work with the stakeholders group



Rijeka (PP5 - RIJEKA)	D.T2.4.3 Management plan for the future functioning of a Rikard Benčić complex D.T2.4.4 Pilot implementation of 1 selected financial instrument (FI) from the management plan will take place and be evaluated after 6 months
Santa Croce palace in Cuneo (PP8 - COMCN)	D.T2.5.1 Establishing a public-private-people collaborative working process D.T2.5.2 Co-design of a proposal of management and funding scheme for Santa Croce palace in the city of Cuneo D.T2.5.3 Pilot implementation of the management and funding proposal D.T2.5.4 After 6 months after the management plan preparation, an evaluation report will be prepared to assess the level of implementation of the PPP project and provide recommendations

ForHeritage tools that should be tested in each pilot are presented in Table 2.

Table 2: Pilot actions and tools to be tested

Pilot action	ForHeritage tools
Pomeranian Dukes' Castle in Szczecin (LP - WESTPOM)	<ul style="list-style-type: none"> <li>• 1 selected financial instrument (FI) from the management plan</li> <li>• Transferable elements of cultural heritage revitalisation pilot projects</li> <li>• Good governance and participatory governance tools</li> </ul>
Vodnik Homestead in Ljubljana (PP3 - RRA LUR)	<ul style="list-style-type: none"> <li>• 1 selected financial instrument (FI) from the feasibility study</li> <li>• Transferable elements of cultural heritage revitalisation pilot projects</li> <li>• Good governance and participatory governance tools</li> </ul>
Rikard Benčić complex in Rijeka (PP5 - RIJEKA)	<ul style="list-style-type: none"> <li>• 1 selected financial instrument (FI) from the management plan</li> <li>• Transferable elements of cultural heritage revitalisation pilot projects</li> <li>• Good governance and participatory governance tools</li> </ul>
Santa Croce palace in Cuneo (PP8 - COMCN)	<ul style="list-style-type: none"> <li>• Implementation of the PPP project (management and funding scheme; pilot implementation, including preparation of documents for a call to identify private partners)</li> <li>• Transferable elements of cultural heritage revitalisation pilot projects</li> <li>• Good governance and participatory governance tools</li> <li>• Financial instruments and innovative financial schemes</li> </ul>



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All pilot activities have been facing different challenges. That was also one of the reasons why the project is prolonged for three months.



## Summary description of the pilot action

The ForHeritage project initially identified Cascina Vecchia in Cuneo as pilot site for Italy. Due to different timings of the renovation of this rural historical complex, compared to those of ForHeritage, the City of Cuneo, in accordance with the other project partners and the Joint Secretariat of the Interreg Central Europe program, decided to change the Italian pilot site to some rooms located within the Palazzo Santa Croce in Cuneo.

The main aim of the Italian pilot site was to experiment a new management and funding scheme for the rooms located at the ground floor of the above mentioned historical building, through a collaborative process between the municipality and the stakeholders, with the involvement of the population, too.

The idea behind the pilot project in Cuneo was the design of a proposal of management and funding scheme for the pilot site, based on a public-private partnership, as result of a participatory process.

The pilot action wanted also to test some innovative tools that the City of Cuneo never experimented before in the management of cultural heritage. In 2017 the municipality published a call for giving in concession the rooms of the pilot site but no private subject replied because conditions set were not appealing enough and uncertainty around the remaining portion of the building was too high. Trying new ways of management and funding might overcome this reticence.

The main challenge the pilot project had to face was the fact that the whole building is under a transition phase. In fact, one portion of the Palazzo Santa Croce has already been restored and is now hosting the Young People and Children Library and some archives, while the remaining portion is going through a deep renovation process that is not started yet and that will probably last for some years. Any management project of the rooms located at the ground floor has to co-live with such a transitory situation and has to evolve together with the evolution of the whole building that will host the Civic Library from 2025.

Of course, Covid-19 pandemic represented an important obstacle, too but being the time for renovation and revitalization of the site quite long, it did not represent the main challenge.

On the whole project level, the Italian pilot action represented a case study of a difficult situation, represented by the complexity of the Palazzo Santa Croce, that could be solved through the right involvement of stakeholders and through adopting a different approach to the management. The City of Cuneo had to change the approach adopted until then, to keep open to proposals, to accept and adopt different administrative procedures in order to experiment something new.

That was exactly what ForHeritage aimed at: overcoming difficulties and fear for some new and integrated approaches in order to test new forms of management that see the public and the private actors working together for the same purposes. The testing proved to be somehow difficult to apply and had to face constraints but represented also a learning process for the whole



municipality and for those that participated to the meetings and events organized within the ForHeritage project.

The pilot action in Cuneo had a positive outcome: it helped the City of Cuneo in finding a potential private manager of the pilot site and even if, at the time of May 2022 and of project conclusion, the process was not ended yet, the pilot action proved to be successfully implemented.

In fact, the City of Cuneo established a technical discussion table involving the Director of the Culture Department of the municipality, the Counsellor for Cultural Affairs of the City, the Director of the City Libraries and the ForHeritage staff, meant to proceed with the procedure launched within the project.

As forecasted by the procedure itself, several meetings took place between the technical group of the City of Cuneo and the Fondazione Circolo dei Lettori that submitted its proposal for management of the pilot site in response to the call launched in autumn 2021. The meetings, both online and in presence in Cuneo, were meant to further discuss the proposal submitted and define it in relation to the Administration's objectives; to set up a collaborative working table meant to agree the content of the management and the forecasted activities; to discuss the financial aspects of the project.

The process took several months because the City of Cuneo went through elections in June 2022, which slowed down a bit the process. The last meeting between the Fondazione Circolo dei Lettori and the City of Cuneo took place in October 2022 and the process is still going on, until an agreement will be found.

Nonetheless, the pilot project represented an important learning experience for both the most involved partners: the City of Cuneo as CH site owner and Finpiemonte as main mentor, which contributed specific skills.

The advantages of the process adopted derived from:

- the involvement of stakeholders, who provided their inputs about the management of the pilot site;
- the consultations with experts in cultural heritage management, who gave good suggestions based on their experience;
- the support of an international network of mentors (the ForHeritage partners), combined with a local-based dedicated mentor (PP07 - Finpiemonte), to consult with and discuss the most complex aspects of the process;
- the procedure adopted by the City of Cuneo and the publication of a call for expression of interest that stimulated the participation of private cultural subjects.

The only deviation from what was stated on the Application Form, beside the changing of pilot site that occurred prior to the project start, concerned D.T2.5.1 - "Establishing a public-private-people collaborative working process": this deliverable, in fact, required the involvement of the citizens



in the collaborative working process. This was considered untimely by the municipality of Cuneo, because of the uncertainty of the call and of the final cultural content of the pilot site. Therefore, the collaborative working process only involved cultural stakeholders such as local associations, local authorities, bank foundations, cultural regional agencies, etc.

The City of Cuneo got also the support of mentoring project partners who gave their transnational added value to the whole pilot action implementation. The partners met constantly during the main period of implementation in order to be updated on the progress and to support the City of Cuneo. Being some of the mentors, partners of previous projects dealing with the revitalization of cultural heritage and with innovative management and financial schemes, also in the form of PPPs, the input they provided was very useful.

At the same time, Cuneo pilot project could be considered a case study for the ForHeritage project and its transnational territories because it proved to be successful and provided important learning lessons to the cultural sector in Italy and beyond.

### Expected impact and benefits of the pilot action

The main pilot action benefit for the City of Cuneo was indeed the finding of a private partner for the management and the funding of the pilot site. From this point of view, even if the process has not ended yet, we can state that the new approach stimulated the interest of at least two private cultural subjects: one that submitted a project proposal and another that would have submitted it but was missing one requisite in order to be able to participate to the call.

Beside this outcome, the pilot action has an important impact on the municipality because it forced it to activate a new approach both in terms of stakeholders' involvement and in terms of innovative management schemes and procedures that the municipality approached only once, prior to the ForHeritage pilot project.

This meant a learning process for many levels of the administration: from the political part, to the directions of the departments involved, to the administrative employees asked to prepare the documents and procedures needed to implement a PPP scheme.

Given that the City of Cuneo was implementing another PPP scheme for the management of a cultural heritage site, ForHeritage pilot action could dialogue with this other experience in order to find similarities, differences and share the knowledge acquired by both situations.

Not only at the local level, since the City of Cuneo is the Administrative centre of the Province of Cuneo, the impact the pilot action could have on the local territory and beyond is positive and high. The PPP scheme adopted is in fact quite innovative on the national territory and not many local authorities adopted it for the revitalization of their cultural heritage. In case both PPP schemes applied by the City of Cuneo have a positive outcome, Cuneo will be the first city in Italy having implemented twice that specific form of PPP on its cultural heritage.



On the local side, beyond the learning benefits of the pilot action, it would have a positive impact also on the population of Cuneo and its surroundings because it would have helped the revitalization of the pilot site, otherwise seldom used and somehow neglected. What is forecasted for the pilot site is a cultural centre focussed on books and reading, that will also host many other cultural activities. The pilot site revitalization will represent, together with the renovation and transfer of the new Civic Library, the starting point for the transformation of the historical city centre into the “Citadel of Culture”.

If the new form of management and funding will prove to be functional because of its PPP character and the easiness of procedure compared to more rigid and traditional ones, also stakeholders involved within ForHeritage might be interested in applying it for the management of other cultural heritage sites. What is interesting of the procedure adopted by the City of Cuneo is that it could start as:

- a top-down initiative, when the Administration publish a call for expression of interest and private partners apply to it;
- or as a bottom-up one, when the public Administration receives a project proposal for the management of an unused site and can decide whether to start a PPP scheme or not, based on the public interest the proposal fulfils.

If the PPP scheme adopted in Cuneo will work well, other private cultural subjects might try to suggest new projects of cultural heritage revitalization or the Administration could think about that approach when planning a new renovation project.

The City of Cuneo is anyway aware that, as a pilot action, the whole process could be ameliorated because it faced some difficulties, also from the stakeholders’ involvement point of view. However, the contact created with the stakeholders have been used also for other projects concerning cultural matters and of course the same and new ones will be involved in future participatory processes that might interest them.

The other side of this involvement is that in the last two years, the same stakeholders have been asked by the Administration of Cuneo to participate to many worktables: being most stakeholders small associations lacking human resources, it was sometimes too demanding for them. Therefore, future participatory processes will have to be well organized and agreed among different city departments in order to avoid overlapping of events, worktables, etc.

## **Sustainability of the pilot action results and transferability to other territories and stakeholders**

The Italian pilot action represented a test field for the City of Cuneo and for Finpiemonte. More specifically, the pilot project itself will continue after the project end with the concrete management and revitalization of the pilot site, thanks to the approach adopted within ForHeritage that led to the identification of a private partner.



The sustainability of the pilot action, however, will not be limited to that: being a learning process and having proved to be a useful approach for the revitalization of cultural heritage, the process might be used in some other situations thanks to the experience acquired by the City of Cuneo.

Not only, beyond the Cuneo territory the approach tested and the lessons learned within the project could be transferred to other local authorities eager to find innovative and successful approaches to the revitalization of their cultural heritage sites. The workshops and dissemination event that will take place in May 2022 will be already a mean of transferability of the approach and of the experience learned during the implementation of the pilot action.

The PPP scheme adopted on the pilot site is seldom used in Italy but at the same time is gaining in consensus. In fact, it promotes a different approach in the management of cultural heritage sites: it implies a change in the traditional paradigm of the public owner of historical sites looking for a mere manager without a dialogue and a common understanding of the public interest in the site. The more public administrations will adopt it, the more sites will be revitalized in a sustainable manner because their functioning will be the responsibility of both the public and the private partner, who will have to work together for the whole management period.

If the Cuneo pilot site will be successful it will be one of the few case studies implemented in Italy and will serve as a model for other administrations and other cultural organizations.

Not only, the D.T3.5.2 - “Management and financing model for cultural heritage sector in Piedmont region” could be used as a tool for disseminating the Cuneo experience and clarifying challenges and changes needed in order to successfully implement such innovative approach.

In ForHeritage experience, the Italian partners agree on the need to better approach stakeholders for the good implementation of a management project: their role is fundamental and therefore they should be correctly involved and listened.

Also, as a first experience with PPP schemes in the cultural management of a site, an experienced consultant is needed to guide the Administration and the private partner to the procedure for setting up the PPP. Luckily, the City of Cuneo could boast a second experience of a PPP scheme adoption for the management of a cultural heritage site. Therefore, it was possible to ask for advice to the office in charge of that PPP implementation. However, the two situations differed a lot, which means that the ForHeritage pilot project had to be somehow autonomous.

The external consultant appointed for the identification of the right PPP model was not experienced enough to provide the right support while the role of mentors was very helpful but, being some aspects too nation oriented, it was limited at some point.

If the Italian partners City of Cuneo and Finpiemonte could start the pilot action from zero they would probably search for a more experienced consultant, they would approach stakeholders differently, they would ask for advice from other public Administration that went through the same process.



## Tools used in the pilot action

ForHeritage tools	Used	Not used
HOW TO INVOLVE PUBLIC? Good/participatory governance in cultural heritage	X	
PILOT PROJECTS - Transferable elements of cultural heritage revitalization pilot projects	X	
PUBLIC-PRIVATE COOPERATION in cultural heritage revitalisation	X	
Financial instruments and innovative financial schemes for cultural heritage	X	
HOW TO ORGANISE A SUCCESSFUL TRAINING to improve management in the cultural heritage sector		X
IMPACT ASSESSMENT of cultural heritage projects		X

In general the tools developed by ForHeritage project proved to be useful for approaching the topics for the first time or for a general understanding of the matter. Some were more practice oriented, some other more theoretical because of the complexity of the topic.

For the Italian pilot action implementation, four out of five tools have been used, more specifically those that were more needed in order to test the integrated approach suggested within ForHeritage. The two tools that have not been specifically tested on the pilot project in Cuneo are the one on the topic of trainings and the one on the topic of impact assessment.

The first one was not needed within the implementation of the pilot action because no workshops, trainings or events - stakeholders' meetings excluded - were organized. Indeed it was a very practical tool, with interesting references and hints that might be useful for other projects and activities implemented beyond ForHeritage project.

The tool on the impact assessment was also not taken too much into consideration because the implementation of the pilot action ended at a stage that does not allow for a real assessment of the impact of the project. It would be better to adopt a monitoring and assessment system when the management of the pilot site will be ongoing or after some time since the starting of the management. Impact Assessment could therefore be taken into consideration in the upcoming phase of the pilot actuation.

No problem was encountered when using the tools, beside the fact that some of them are quite theoretical than others and the approaches to the topic might differ from nation to nation. In that case, a deeper understanding of the national legislation, for example in case of the PPP approaches for the cultural heritage, was needed.



## Stakeholders` involvement

During the pilot action implementation more than one actor have been involved within the City of Cuneo: beside the Sportello Europa Office staff, responsible for the project coordination, during the whole period internal meetings and decisions were shared with the Culture Department Director, the Culture Affairs Assessor and the Library Service Director. More specifically during the pilot action implementation, the staff involved also the Public Procurements Department Director and his staff.

In general, there was a strong commitment both from the offices and from the political part to make progress on the pilot action and get a successful outcome because of the willingness to revitalize the pilot site. All people involved actively participated in the meetings and gave their support. However, a little understanding of the new procedure to adopt and a small resistance in changing some usual elements of the administrative procedures were encountered. This was mainly due to the inexperience of the staff responsible for the pilot action that was not able enough to give clear answers to the questions and doubts that arose. The external consultant should have helped in this sense, but he was not enough experienced either, above all on administrative procedures.

Another challenge encountered was the slowness of the public administration: some decisions on the implementation of the pilot action took weeks or months to be taken and this slowed down the process.

Nonetheless, responsibility was always shared and support was given by all.

Also Finpiemonte staff, in its role of mentor, helped a lot in identifying the right PPP scheme to apply to the pilot site.

For what concerns the external stakeholders group, as above mentioned, the Italian partners agree that a better approach could have been applied in order to better involve stakeholders. However, a small and constant group of people, quite varied, followed the project with interest.

The main lesson City of Cuneo and Finpiemonte learned is the importance to involve stakeholders at a project stage when the elements of the project are clear and the steps defined. The mistake made was a too premature involvement, on too theoretical agendas of the meetings, that led to a loss of interest when the stakeholders were more needed, which means during the pilot project implementation. Not only, bad timing occurred since the most important phases of the pilot action took place in Summer months of 2021 when it was very difficult to organize meetings.

Beside that, the stakeholders group was very varied and cover many target groups: from local cultural associations, to bank foundations, from regional agencies appointed for cultural promotion, to other projects working on cultural matters. The involvement of other local authorities potentially interested in applying a PPP scheme on the revitalization of their cultural



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heritage could have been interesting, as well as national institution appointed for such themes and for the legislation concerning the management of cultural heritage sites.

Contribution to/compliance with relevant regulatory requirements, sustainable development - environmental effects and horizontal principles such as equal opportunities and non-discrimination, if applicable

Not applicable