

DELIVERABLE D.T1.4.5

Transnational report summarising conclusions resulting from discussion panels with stakeholders organised in Poland / Italy / Croatia / Slovenia





Purpose of the report

Providing a Transnational summary of outcomes of meetings with stakeholders dealing with historical ruins; gathering conclusions resulting from discussion panels.

Report will be taken into account in attuning the elaborated models to real needs and problems of stakeholders.

Credits

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Forward

Stakeholders are acknowledged as drivers of effective conservation of cultural built heritage.

Considering that stakeholders have heterogeneous opinions of historic fabric preservation and management the panels analysed practitioners and professionals point of view and stakeholders' to conservation.

The report provides stakeholders' concerns in heritage maintenance and sustainable development and their awareness about policies and practices.



Organisational information regarding the Panels

Four national discussion panels with relevant public/private stakeholders involved in directly or indirectly in the management, protection and use of historical ruins site were held between March and June 2018.

The national discussion panels were attended by

- Representatives of public and private bodies (or even private owners) in charge of the protection and the management of the ruins sites.

- Cultural NGOs and civil society organizations,

Universities and Research Institutes,

Superintendence and other peripheral bodies of the Ministries of Culture and Heritage Assets,

Archive Offices, Museums,

Architects, engineers, archaeologists (and other technical professionals) and related associations of category,

Local tourism boards,

Municipalities, Regional Council and National Agencies

All the four panels were organized in terms of an inter-active participated debate, starting with the presentation of the main features, challenges, bottlenecks and added value of the ruin sites, stakeholders developed a frank confrontation and cross-fertilization.

Whilst the Slovenian, Croatian and Italian discussion panels were focused in the deepening of a unique ruin site and its surrounding environment (urban, cultural, social, historical and environmental context), the Polish national discussion panel took into consideration the historical ruins of 10 castles in the Lower and Upper Silesia.

Date 8th March, 2018

Place Lower Silesian



Organized by Historical Monuments & Art Conservators Association Poland -Silesian Branch (Stowarzyszenie Konserwatorów Zabytków Oddział Śląski), The Lower Silesian Chamber of Architects in Wrocław (Dolnośląska Izba Architektoniczna we Wrocławiu), Lower Silesian Voivodship Conservator of Monuments (Dolnośląski Wojewódzki Konserwator Zabytków), National Heritage Board of Poland (Narodowy Instytut Dziedzictwa)

Asset 10 castles in the Lower and Upper Silesia

Topic “Protection, conservation and management of historic ruins in Lower Silesia”

In the agenda:

Introduction Barbara Nowak-Obelinda M.A., Lower Silesian Voivodship Conservator of Monuments

First of all, do no harm.“. Secondly educate. Thirdly, reviving. Artur Kwaśniewski Arch., Ing., Ph.D., Wrocław University of Science and Technology Faculty of Architecture

Archaeological research and conservation of castle ruins Rogowiec, Wierzbna and Cisy.. Artur Boguszewicz, Ph.D., University of Wrocław

Castle Chudów - research, maintenance, exhibition Przemysław Nocuń, Ph.D., Jagiellonian University.

Castle in Ząbkowice Śląskie - maintenance of a permanent ruin.Maciej Małachowicz, Arch., Ing., Ph.D.

Castle Niesytno in Płonina - a summary of 5 years of research and conservation work Piotr Błoniewski, M.A., Arch., Ing., Wrocław University of Science and Technology Faculty of Architecture.

Castle Lenno in Wleń - conservation of castle ruins. Adam Marek, M.A., Arch., Ing., CCI,



Castle Świny - research, restoration of ruins, reconstruction of the palace Małgorzata Chorowska, Prof., Arch., Ing., Wrocław University of Science and Technology Faculty of Architecture

Castle Bolków - conservation of historical ruins, functioning of the museum and meeting place Adam Łaciuk, M.A., Castle Museum Bolków

Castel Grodno in Zagórze Śląskie - historical ruin as a tourist attraction. Paweł Brzozowski, M.A., Center of Culture and Tourism in Wleń



Date 21st June 2018
Place Youth ho(s)tel Velenje
Organized by Velenje
Asset Šalek castle ruins
Topic Ruin strategic enhancement as a part of the tourist infrastructure in the Šaleška valley

In the agenda:

Introduction Boštjan Oder, Marija Brložnik, head of the local Šalek tourist society

Historical elements Mojca Ževart, director of the Velenje museum)

Elements of the protection (Danijela Brišnik, director of The Institute for the Protection of Cultural Heritage of Slovenia (ZVKDS OE Celje)

Architectural elements Rok Poles, architect

Touristical elements Marija Brložnik, head of the local Šalek tourist society

Discussion with the audience



Date	29th June 2018
Place	Rector's Palace, Poljana Šime Budinića 3, in Zadar
Organized by	Zadar
Asset	Church of St. Stošija in Puntamika
Topics	Sustainable protection and preservation of the medieval ruins on the example of the Church of St. Stošija in Puntamika and others similar monuments of the surroundings.

In the agenda

Introduction of the conception and the aim of the RUINS project *Nika Cohen (ZADRA NOVA)*.

Historical overview of the Church of St. Stosija in Puntamika (pilot location of the project) with particular emphasis on its Medieval period. *Prof. dr. sc. Mladen Ančić (University of Zadar)*

Presentation of the Church of St. Stosija in Puntamika from the viewpoint of conservation and art history. Professor emeritus Nikola Jakšić *(University of Zadar)*

The overview of archaeological field researches of the location and the presentation of potential new approaches for conservation and restoration of the church. Professor also elaborated the idea of creation of the *medieval sacral monuments tour* from Puntamika to Petrčane (Church of St. Stošija in Puntamika, Church of St. Martin and St. Petar in Diklo and Church of St. Bartol near Petrcane - all in surroundings of Zadar area) that will place the Church of St. Stošija in Puntamika in the wider context. - *Prof. dr. sc. Ante Uglešić (University of Zadar)*



Date 21th May 201

Place Montagnana

Organized by AICCRE VENETO Municipality of Montagnana

Asset addressed ROCCA degli ANGELI and walls of the city

Topics

In the agenda

Introduction Loredana Borghesan, the Mayor of the walled city of Montagnana

Dario Di Girolamo representing the State Property Agency “The process of transferring of the Rocca form the state property to the Municipality for a better conservazion and valorization”

Massimiliano Barison, Regional Council Member, “The regional law for the Foundation of the Middle Ages Museum in Montagnana and resources from Veneto Region”

Massimiliano D’Ambra, Archaeologist “technical issues regarding for restoration and the scenario for reuse”.

Raffaella Lioce, Architect - IUAV University of Architecture, “People expectations and perception of value in the perspective of process for conservation and sustainable management of the ROCCA and the city’s walled fortified system”.

Discussion with the audience

Press Conference



Presentation of the subject and purpose of the Panel

Comparing the four discussion panels we have diverse subjects and topics and different assets.

Panel held in Poland focused on 10 castles in the Lower and Upper Silesia: Bolków, Chudów, Cisy, Grodno, Lenno, Niesytno, Rogowiec, Świny, Wierzbna, Ząbkowice Śląskie, and analysed restoration approaches in comparison with owners expectations

Panel held in Slovenia investigated How the Šalek castle ruins are currently integrated into the touristic story of the Šaleška valley, what are the limitations and the potentials for the development of the Šalek castle ruins into a recognisable touristical attraction/destination...

Panel held in Croatia analyzed the state of conservation of the Church of St. Stošija and examined the possible relations with the context tourist wider strategy

Panel held in Italy focused in the process of ownership transferring from state property to Municipalities underlining the possibilities that this step opens in respect to new valorisation process, urban integration and territorial regional marketing.

It is interesting comparing the main topics raised, as all the panels stressed the importance of balancing needs of conservation and economic uses underpinning the importance of reconciling the preservation of the value of the monument and at the same time to remove threats and adapt the ruins to contemporary needs and demands. The four panels shared potentials that can derive from an effective and sustainable tourism plan, which is demanding and strategic at the same time. Understanding that in some case the no-use can be the solution if conservation allows a knowledge approach to the asset.



Characteristics of Panel participants

- The Polish panel was focused on the issue of the protection of historical ruins sites: the composition of the attendees reflected the purpose of the panel, mostly were technical experts of relevant Polish University and Technology Faculty, as well as Conservators of Monuments and representative. The presence of also private owners of castles added a significant contribution to the debate due to the different angle of confrontation in terms of preservation of ruins heritage sites. Private owners reflect a more business-oriented approach fostering new multifunctional reuse of ruins to tackle the break-even sustainability of preservation of the ruins site, having a minor attitude to invest in intense restoration works.
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- The national discussion panel in Slovenia has closely examined the state of art and the future roadmap of tourism enhancement and promotion of the Šalek castle ruins as a part of the wider tourist infrastructure in the Šaleška valley.
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- The National discussion panel in Croatia has tackled the sustainable protection and preservation of the medieval ruins on the example of the Church of St. Stošija in Puntamika and others similar monuments of the surroundings. The particular feature of this ruin are the different layers of historical evidences: the Church is located within the existing structure of a Roman age water tank, representing therefore an outstanding example of continuity between the antiquity and the Middle Age.
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- The discussion Panel that was held in Italy was focused on the public recognition of the cultural and artistic heritage of the Medieval ruin in Montagnana known as “Rocca degli Alberi”. The event was attended by a representative of the State Property Agency, a Veneto’s Regional Council member, the mayor of Montagnana and other representatives of the local administration, technical experts, such as an archaeologist, architects and



representatives of local cultural NGOs. This discussion panel was the only one (out of the four) that was attended also by media representatives of the local and national newspapers.

	Asset	focus
Poland	10 castles in the Lower and Upper Silesia	protection of historical ruins sites
Croatia	Church of St. Stošija in Puntamika	How maintaining different historic layers of the ruins
Slovenia	Šalek castle	Conservation in the perspective of tourism development of the wider region
Italy	Rocca degli Alberi and medioeval walls of the city of Montagnana	Conservation and reuse: how balancing different issues and managing the urban governance



Characteristics of the issues raised during the Panel.

The **polish panel** presented the standards and principles of protection of the historical ruins in western Poland, on the Lower and Upper Silesia. The issues related to research works, technical protections and experience related to difficult choices of appropriate conservation proceedings were analysed on the examples of ten objects, in order to reconcile the preservation of the value of the monument and at the same time to remove threats and adapt the ruins to tourism. Examples of conservation works have been evaluated by specialists. The reconstruction and the work that blurred the history of the transformation of castles met with a negative assessment. However, such activities gain social acceptance and official permits for implementation.

In the discussion, the private owners of the castles Niesytno and Świny presented their point of view. It escapes the restoration position. The ruin requires constant maintenance, repeated every few years, for which a private investor cannot afford. The goal is to secure and preserve the castle for the future, making the tourist available. This requires reconstructing the old shape with the use of old materials and technologies. Adaptation to commercial functions is necessary. This will cover the costs of functioning of the monument and its maintenance in good technical condition.

The main issues coming out from the polish panel are:

- Need to strengthen landscape protection with ruins (maintaining the identity of the place, protection of spatial development plans, development of the castles' surroundings).
- Need for multilateral studies (historical, archaeological, architectural, landscape) before starting work.
- How to determine the limits of interference?



- Is revitalization a form of ruin protection or threat?
- What functions will be most suitable for ruins and which are destructive?
- Unresolved problem of architectural forms of added elements - neutral, modern, historicizing or reconstruction (in case of certain sources). Individual conservation decisions in compromise or in opposition to the vision of managers or investor's expectations. It is necessary to accurately document the work carried out, at every stage.
- Conservation and use of the monument - maintenance necessary to enable using the monument and ensuring the safety of tourists; route delineation, usually associated with the need to incorporate new architectural elements (e.g. stairs, porches, small accompanying buildings). Protecting a monument or creating a new tourist product?
- Historical ruins can be effectively used for development, not only local one - a ruin can perform a number of material and non-material functions; it can be a tourist attraction and perform culture-forming functions (cultural events)

The main topic of discussion of the **Slovenian Panel** regards the archaeological excavation of the Šalek castle ruins that is considered a pilot- project in the area of Slovenija in terms of treating a middle-age site equivalently as the sites of older eras, and all the interventions in the castle tissue and the surroundings, which are only possible with the permission of The Institute for the Protection of Cultural Heritage of Slovenia (ZVKDS OE Celje). Taking into account that the Institute provides a free know-how for all the interventions, but cannot finance the actions and that the Institute is ready to discuss all the ideas concerning additional use of the castle, panel



shared the need of arranging an official request with a description of the planned action.

Concerning specific restoration issue the panel stressed the importance of not re-building the roof above the main tower of the castle should not be reconstructed as it would alter the current perception of the ruin too dramatically; and of making the place safe before letting the public visit the ruins freely: the walls of the ruins must be firmly inspected & consolidated, where needed; on the top of the tower a concrete crown must be reconstructed + special hooks for climbers should be installed, enabling the further inspections by climbers; so for example current concrete elements should be surface-treated; the ruined portals should be replaced by concrete ones.

Looking to new tourism scenarios it is important to be aware that only after the static consolidation it is possible to develop the area into a tourist attraction.

Currently the finds of the archaeological excavation of the Salek castle ruins are an essential part of the permanent exhibition of the Velenje museum on the Velenje castle (pottery, coins, the key, the arrow-heads etc.); and the Salek castle itself is visited during the pedagogical & andragogical activities of the Museum & excursions through the Valley

Finally, the panel highlighted the need to create a management plan, a visual identity strategy and a platform for different events promotion: furthermore all the knowledge about the Salek castle should be disseminated via internet.

Strategic is the involvement of both the local Salek tourist society, the volunteers from the Šalek area and the local resident who have a strong bond with a castle. Essential is to involve children, consequently reaching their parents, too, and creating the awareness of the Salek castle ruins as an icon of the local place and identity



Considering that the events, initiated by the Salek tourist society, are taking place all year round, but in the future much more events as possible are necessary, thus to creating a constant flux of people, preventing the site from regressing into a depredated area.

The **Croatian panel** started by investigating main characteristics of the Church of St. Stošija. Even is few, the original historical data available let us understand its historical development, but the actual state of art of the monument and its history open a much larger number of questions than it gives answers. The initial historical starting point is certainly the position of the church (late antique and early medieval time frame) by the re-use of the already existing structure of the ancient roman water tank. The church offers a clear example of continuity between the antiquity and the Middle Ages and in the 9th century the church certainly existed and was in use (written sources). It is very important to point out that at the time it was a very visible landmark in its area. In addition to the written sources, the archaeological research is certainly the most valuable source, but the only one that was accomplished was in 1950. The researches made at that time and the conclusions that came up during this unique archaeological research on the monument, offer the most of the today's knowledge of the church. It is composed of two-parted churches, the lower one and the upper one, each with distinct entrances and both in use in the same time. It is dedicated to the st. Stošija, one of the saint patrons of the city of Zadar. Scientifically it raises the questions of use of the lower church as a crypt with the relics of st. Stošija (written sources) and regarding its future protection and preservation it brings an interesting path in the prospective of promoting the church in the general public eye and of realization of the long-term objectives of the project.

Church of St. Stošija is an ancient monument that was set up in abandoned Roman water tank and from this fact it is evident that this monument has already passed through the stage of re-use and change



of purposes in its past, which is precisely one of the considerations that is being sought today by the RUINS project.

This panel discussion has largely served to re-examine the church from the scientific point of view, mainly because even if it is a church of incomplete biography, the church does not remain completely of the unknown historical biography with all its necessary scientific accuracy.

In this context, the attention of the Panel was directed to the actual condition of the church and to the greatest problems with its conservation, which is the preservation from further decay, mostly concerning the church's vault.

It was assessed that as soon as possible it was necessary to proceed with the reconstruction of the vault. Additionally, as the roman water tank was originally entered into the ground, it is estimated that safety considerations should also be considered by installing some form of a pillar on the north side at the entrance.

The participants agreed that all the conservation and restoration interventions must consider that the church cannot stand as a representative object because of its uniqueness.

Furthermore, even though its scientific value is undeniable, as the monument is to become valuable for all the local and wider community, the object should be given the dimension of attractiveness, even spectacularity. In order to achieve that the idea was to use modern technology that would include "light games", thus further distancing the object from the immediate environment, and thus highlighting its uniqueness.

However, even if it is unique, the church should be located in the context of the wider network of early medieval churches from Puntamika to Petrcane, and in this context, the total value of these localities should be recognised. In this regard, the contextualization would have educational value as well as touristic potential in the form



of a Medieval sacral monuments tour that would connect churches with a possibility of additional gastro-oenological context of the tour.

During the lectures there were some questions that remained open:

- The exact time that the church ceased to be in use and why?

One of the hypotheses is that it occurred in the early 16th and/or 17th centuries during the Ottoman conquest of the Zadar surroundings when the church underwent a certain amount of damages.

- The issue of the natural light in the lower edifice.

The restauration of the vault itself raises the question of lighting because the inner space of the lower church, while serving as a crypt, was sufficiently illuminated through the existing openings, especially the window in the southeast. However, in the light of the re-use of the object, the issue of lighting becomes of great importance, and it is necessary to address the problem first of all through an adequate solution from the conservation office. In this context, the idea of some type of glass vault structure was mentioned (that can be found in other similar ruins) which would allow a visually impressive (spectacular) solution aimed for the attractiveness of the building, but also its protection from further decay.

The **Italian Panel** was held the same day the ROCCA degli Alberi has been given to the municipality from the State Property Agency at presence of Veneto Region representatives.

Stakeholders debated with invited speaker issues concening its sustainable enhacment: from conservation issues to new compatible uses and the governance necessary to ensure a sound management and territorial marketing regarding, not simply the asset itself, but the asset as an integral part of the wall fortified system and the wider cultural landscape and territorial heritage.



“Rocca degli Alberi” is a significant part of the defensive walled city of Montagnana, built between 1355 and 1360 to be deployed for military functions. However, due to the advancements of technologies in the past centuries and its disastrous conditions, the structure was abandoned and used as a store, a craft lab and a dog shelter. In 1964, for around forty years, the structure was restructured to become a hostel, well known and frequented mainly by the American people. Nevertheless, during the early years of the 2000, the medieval structure was closed due to the inability of the building to comply with the Italian safety rules. For years, the ruin remained under State properties unable to receive effective maintenance works and adequate valorisation in relation to its cultural and artistic heritage.

During the panel, experts discussed about the cultural, social and economic roles of the ruin within the territory and assumed some proposals for its future conservation use and valorisation.

The municipality of Montagnana has always recognised the cultural and artistic value of its walled city. The transfer of the Rocca degli Alberi from State to Local Municipality represents an important step towards its conservation, both in terms of procedures and capacity to activate resources. Indeed, For the municipality, preserving and valorising the medieval building represent a chance to foster the overall socio - economic development of the city, leveraging on culture and tourism. The will to develop the emerging tourist destination has been shared by the panel that agree on sustainable exploitation of cultural heritage to provide benefits to the city ensuring both the historical and artistic conservation, and the economic growth. The fortified system can create opportunities for the local community for recreational purpose and for new jobs creation.

Being one of the key cultural and artistic symbol of the territory, the municipality of Montagnana submitted a request of ownership based on a sustainable project for preservation and valorisation of the ruin. In line with the Italian legislation, the State property agency awarded



the sustainability and conservation of the project signing officially, during this Panel, the agreement that transfers the ownership of the ruin to the town.

The project for the conservation, valorisation and management has been introduced to participants and shared by stakeholders who give suggestions especially in terms of community engagement. As confirmed by Veneto Region it is expected to be implemented within eight years.

To promote the synergies among public and private stakeholders and participants, the Plan of Valorisation aims at the tourist, social and economic development of the ruin. The project goes beyond the conservation of the cultural heritage and assumes the objective to valorise and promote a specific touristic experience encompassing cultural heritage, including food, landscape and immaterial dimensions.

Going behind the issue of conservation the panel shared data regarding the tourist flow in the region of Veneto realizing it is the most important regions in Italy in terms of tourism flow, but that there are several destinations to be explored: among these Montagnana is an excellence, being already recognised also as of the most fascinating historic village of Italy.

The panel debated also the process to establish a specific Foundation, supported by the Municipality and the Region, recognising its importance in managing both the site and the wider territorial marketing strategy, capable to encompass all the walled cities of the region.

For a long terms sustainability of the intervention and the scenarios, the panel agree on the importance of communities hearings and direct involvement in decision making process, ad for achieving the valorisation goals. As demonstrated by the study on the perception of value of the asset form the local community, there is a high expectation because of the Rocca has a deep identity value for citizens. A citizens questionnaires engaging more than 400 people,



depicts three main features of value: (i) the worth – the direct use of the cultural goods for economic purposes; (ii) the non-worth – the value of the good is attributed to non- economic reasons (identity and cultural heritage transferred to future generations) and people interested to pay for them; and (iii) the eco-systemic value – the heritage is perceived in terms of relations with external social, cultural and economic contexts. The results of the study were outstanding, it was observed the awareness of the cultural heritages' identity value, the role of their conservation and the consequential benefits for the local community.



Conclusions and recommendations from the panels

The conclusions of the **polish panel** can be summarized as following

- Presented issues and problems regarding protection, re-use and management of historical ruins in Silesia illustrate the lack of a systemic approach - even in a restorers community, persons responsible for the protection of monuments. The indicated examples in terms of the limits of interference in the historic substance, form and landscape are an obvious confirmation of this thesis.
- In theory and developed rules of dealing with historical ruins, historical ruins are full-fledged monuments, the best pattern for their protection is to leave them in their existing form - preferred preventive conservation, with acceptable, small cubature complements - view developed by the scientific community and theoretically accepted by the restorers community. This principle should be a paradigm of the protection process.
- In practice, however, there are many cases of non-compliance with these basic principles. There is a fairly significant discrepancy between theory and practice. This is justified by practical (ruin is not a natural state of the building) and social considerations (ruin is often not accepted as a testimony to history).
- For this reason, it is necessary to constantly remind the basic principle of protection of historic ruins. Protection of the substance's authenticity, form and landscape with a view of and from ruins should be one of the guiding principles in dealing with historical ruins.



- There are prevailing opinions that historical ruins should be "living" monuments - besides conservation and security, they should be used and managed - for various social and economic purposes.
- Historical ruins are a place of multiple forms of modern use and re-use - mainly for commercial (economic development through the development of tourism), educational and culture-forming purposes.
- There is some discrepancy between the "conservation" approach and the perception of the maintenance and use of ruins by administrators (especially private ones). Conservation services generally occupy a preservative position - maintaining the authenticity of substance and form. Owners point to the necessity of at least partial reconstruction, mainly in order to introduce new functions (including commercial ones).
- The principles of protecting historical ruins should be treated as an element of local and regional development policy (tourism, culture etc.)

The recommendations of the polish panel are the following:

- Necessity to develop a model of documentation assessing the technical condition and needs of conservation intervention - so-called The Technical Assessment Charter of Historical Ruins
- Necessity to develop a technical survey guide for the historical ruin - Research and Apparatus in the analysis of the Historical Ruins
- Necessity to develop a doctrinal document for the protection of historical ruins - The Charter for Protection, Management, Use of Historical Ruins
- Development of guides on the preservation, management and use of the historical ruin in the form of Management Plan - Historical Ruin Management Plan - Guide





The conclusions of the **Slovenian panel** can be summarized as following:

- The residents of the Šalek would like to get a replica of the stone grave monument of the Rosina Raumschuessl (original stored in the Velenje museum) - to be put back to the original site (in the outer wall of the st. Andrew church). The possibility of creating the replica will be checked.
- It is essential to remove the plants, growing on the castle ruins, before the roots would damage the walls. But it must be done as a part of a complete reconstruction-action = the walls must be sealed after the removal of plants to prevent further destruction
- The actions are taken by the municipality to get financing for the actions needed
- the current panel is an indication of a raised awareness of the unique role of the Šalek castle ruins in the space of the Šaleška valley and a good starting point for further actions needed

The recommendations of the **slovenian panel** are the following:

- The preservation/development should be managed in 3 steps:
- 1st: the urgent actions to assure safety of the ruins (consolidations of the walls, remains of the vaults and the castle rock, removal of aggressive plants, reconstruction of the ruined elements of the path to the castle)
- 2nd: the creation the management plan and the implementation of the permanent care for the ruins as they are in the current state
- 3rd: the further development of the site: different possibilities - according to the financial structure & agreed priorities (the annotation & explanation boards, the traffic signs, the renewal



of the fence, the possible presentation of lost architectural elements of the castle and creation of the viewing platform at the top of the tower, the reconstruction of primary access to the castle etc.)





The conclusions of the **Croatian panel** can be summarized as Further action to be undertaken:

- During the panel there was a question of possible further archaeological excavations, as they have been executed only once, but the conclusion is that that kind of scientific field intervention in space is simply impossible because of the high urbanisation of the surrounding area.
- Although only a few archaeological artefacts have been preserved and kept in the Archaeological Museum in Zadar, the question of their return in situ was mentioned, with adequate protection of course, but the material was such that it would add nothing to the attractiveness of the church, but would only bring great challenges in resolving their adequate protection.
- During the discussion, attention has been focused on the importance of the local community (members of Puntamika society) and their enthusiasm and efforts that preserved the church of St. Stosija in Puntamika of much important deterioration. Their efforts and commitment are considered as a pledge for a successful revitalization of the church.
- Church of St. Stošije in Puntamika can certainly be presented as an excellent pilot project in the context of the activities of the project RUINS. The monument itself is not yet considered as a spectacular and important monument, in the eyes of "the larger public" as only few are aware of its existence, in a scientific and cultural sense the church is extremely important. To ensure success, its conservation and restoration should be planned in collaboration with the academic community, conservation offices, cultural structures and the local community.
- Below there are a number of recommendations that should help in the realization of the project, but are considered also as a starting point for further discussion of the implementation of



this project. Any activity around this essential site should be based on good public communication and involvement of as many stakeholders as possible to avoid possible project implementation mistakes.

The recommendations of the **Croatian** panel are the following:

- When making further decisions regarding the conservation and restoration actions on the monument make sure that the church is one of a kind, and that its scientific value must be taken into account. The solution must bring the wider acknowledgement of this church by bringing the particularity in its restoration and renovation, making sure along the way that the scientific importance of the church is spread as well. One of the solutions could be to distance the monument from the immediate environment and thereby emphasizes its uniqueness. In that context, the attempt for the restoration of the Church of St. Stosija in Puntamika into its initial state is not considered as a good course of action.
- Any further intervention directed towards the church should start from observing the church in the wider context of the network of early medieval churches in the wider Zadar area.
- In order to present the church to the general public in the educational context of the Croatian mediaeval history, there is a suggestion of the touristic use of the locality through the route from Puntamika through Diklo to Petrčane, where the public would get acquainted with medieval locations enriched with gastro-oenological offerings according to medieval recipes. In that case, the middle ages become a framework for a story where the locality of St. Stošija is the starting point and would certainly become more interesting and appealing to the general public.





The conclusions of the **Italian panel** can be summarized as following:

- Although the scenario plan for conservation and re-use has been independently by parishioners and stakeholders, with no direct involvement of people, its outcome reflects the wishes of local community, as demonstrated by interviews and the study concerning the perception of the cultural heritage value for the local community and the role of ownership transfer.
- Considering that majority of interviewers to the question who should be the subject responsible for the cultural and artistic heritage of a city, answered the municipality, the transfer of ownership form states is a concrete response to the urgent need of the community in terms of conservation and use.
- The establishment of a Foundation is only the first important step toward a more complex an integrated governance model to be developed at territorial and urban levels

The recommendations of the **Italian panel** are the following:

- It is important to establish a shared governance structure for the purpose of developing a strategic management plan, taking into account the agreement with the region;
- It is necessary to develop a cost benefit analysis regarding the reuse plan of the Rocca as a new museum of medieval architecture in the Veneto Region;
- It is essential to develop a comprehensive territorial marketing strategy taking into particular account tourism potential of the City of MONTAGANA;
- It is vital to strengthen to role of the regional walled city network in the general perspective of promoting thematic tourism products from foods to slow and cultural tourism.



Lo Stato cede al Comune la Rocca degli Alberi

Firmato il passaggio di proprietà di una porzione delle mura di Montagnana. Il complesso dovrà ospitare un innovativo museo della medioevalità

di Nicola Cesaro
MONTAGNANA

Rocca degli Alberi è ora di proprietà del Comune di Montagnana. Con la firma (prima digitale, poi simbolicamente a penna) di ieri mattina, il direttore regionale del Demanio Dario Di Girolamo ha ufficialmente ceduto al Comune di Montagnana la Rocca degli Alberi e una piccola porzione di mura nell'arco nord occidentale. Con un impegno quello di realizzare, entro meno di dieci anni, un museo interamente dedicato alla medioevalità.

È sicuramente una data storica quella di ieri, non fosse perché dopo anni il Comune mette le mani su uno dei simboli cittadini: archiviata la speranza di entrare in possesso di tutte le mura, nel 2015 l'ente locale aveva richiesto allo Stato di ottenere - dopo Castel San Zenò - almeno la Rocca in virtù del federalismo demaniale avviato cinque anni prima. «Lo Stato vanta immobili per 60 miliardi di euro, per l'80 per cento utilizzati per scopi propri. Il resto lo cediamo a chi ha seri progetti di



Dario Di Girolamo e Loredana Borghesan. A destra la Rocca degli Alberi

valorizzazione: pensiamo che l'idea calata sulla Rocca degli Alberi sia un ottimo progetto, e che sia soprattutto sostenibile», ha spiegato Di Girolamo.

«Alla richiesta di trasferimento di questo bene abbiamo allegato un piano di valorizzazione che prevede, per la Rocca degli

Alberi, la creazione di un Museo della Medioevalità» spiega il sindaco Loredana Borghesan. «Stiamo parlando di un'iniziativa molto ambiziosa, che richiederà almeno otto anni di lavoro. Dopo la firma di oggi, il primo passo sarà condividere questo piano iniziale con cittadini

e associazioni del territorio. Vogliamo creare un polo sinergico che sia fonte di sviluppo turistico, sociale ed economico». Il piano di valorizzazione iniziale è stato redatto dall'archeologo Massimiliano D'Ambrà, che per la Rocca degli Alberi ha ideato un polo museale «smoderno, capace di regalare esperienze emozionali nuove rispetto a qualsiasi altro museo veneto, capace di utilizzare anche tutte le più recenti tecnologie e multimedialità. Non sarà solo un museo conservativo, non sarà un museo morto».

È UNO DEI QUATTRO BORGHESI DA SCOPRIRE

La città murata sarà promossa da Trentitalia

Ieri, a Milano, il museo Mudec ha ospitato la conferenza stampa per la presentazione del nuovo orario estivo dei treni, da domenica 10 giugno all'8 settembre. Pochissime novità per il Veneto e in particolare per Padova, ma una delle più importanti notizie per lo sviluppo del turismo a Montagnana e dintorni. Trentitalia ha deciso, nell'ambito di un progetto F5 dedicato ai Borghi d'Italia, di dare una mano concreta alla promozione pubblicitaria della storica città murata della Bassa. Una scelta comunicata nel corso della presentazione. Ametà conferenza ha



preso la parola Maria Annunziata Giacomini, attuale responsabile nazionale del trasporto regionale di Trentitalia e dirigente del medesimo settore a Venezia sino a poco tempo fa, che ha fatto proiettare quattro diapositive riferite allo sviluppo dei Borghi d'Italia. Uno dei quattro report riguardava proprio Montagnana. Gli altri tre erano riferiti a Taormina, Tropea e Venanzza (Cinque Terre). I dirigenti di Trentitalia hanno comunicato che le immagini della città murata saranno proiettate anche a bordo delle Freccie, sia Rosse che Bianche e

Argento, all'interno di un blocco turistico dedicato ai 25 borghi sparsi per la penisola. «Montagnana merita questo e altro», ha detto la dottoressa Giacomini «è la città murata meglio conservata nella penisola. In treno ci sta appena 26 minuti da Monselice un'ora da Mantova». Questo il futuribile. Per quanto riguarda, invece, il presente, sempre dall'itinerario dove sono illustrate le immagini più belle dei 25 borghi, si può constatare che già attualmente alcuni alberghi cittadini, in particolare quelli che ospitano i turisti ciclisti, praticano la clientela, che arriva in treno, uno sconto del 10% (f. pad.)

imporre alla Regione un versamento di 30 mila euro alla nascita della Fondazione e il versamento annuale di altri 20 mila.

In occasione della firma di ieri è stato presentato anche uno studio elaborato nell'ambito del progetto "Ruins" da Aiccre

in collaborazione con lo Iuav di Venezia e dedicato proprio al futuro della Rocca: su 400 intervistati (il 45% di residenti), in nove su dieci hanno sottolineato il dovere del Comune di "riabilitare" questo importante monumento cittadino.

GIORGIO DI NICOLA/AGF



Final Consideration

When the abandon of cultural built heritage endangers its conservation, existence and identity, adaptive reuse projects become pivotal and unavoidable, but this does not necessarily mean to find a new



exploitation use. Sometimes non-use projects may be more effective. Non-use, but conserving a ruin may provide territorial stakeholders with valuable assets capable to produce important externalities. Their attractive power for tourist, citizens and creative industries, must be understood and considered as a real socio-economic asset.

For many years we have discussed about the need of economic re-use, looking simply to single heritage building adaptive re-use plan, focusing our attention on the vocationally and potential reconversion, forgetting that they are drivers of a wider development strategy, notwithstanding their adaptability to new uses.

The “Economics of heritage” is an established area of investigation in cultural economics, with an expanding literature that has been developed mainly around three fields of study: the economics of museums, the art markets, the economic aspects of built heritage.¹ These studies usually concentrate on the analysis of the decision-making processes, on their implementation and the assessment of the effects of their measures.

Like any other capital goods, heritage goods are subject of economic activities, as far as they are used or not directly used. Their protection, knowledge, conservation and diffusion have a cost; they are traded in formal and informal markets; they generate satisfaction and benefits to individuals and communities that have access to them; and they constitute a potential input in the production of other goods and services. This means that it is possible to analyse the heritage sector from an economic point of view, but the fact that it is feasible, nevertheless, does not mean that it is a simple issue.²

The mainstream opinion believing that economists focus too much on financial measures, overlooking the real cultural significance of CH is inappropriate. *Nowadays any decision with respect to preservation, restoration or re-use, involves limited resources and, consequently, a ranking of the needs to be satisfied by them. Once used for heritage*

¹ Klamer & Zuidhof 1999; Towse 2002

² Krebs & Schmidt-Hebbel 1999, 211 - Eva Vicente “Economics of Built Cultural Heritage”



*maintenance and preservation, the resources cannot go in alternatives - resulting an opportunity cost attached to them.*³ Assessing the value of built heritage refers not only to their simple physical asset value: it calls for a deep understanding of multifaceted issue that derives from the context dynamics, as well as from the significance and the identity dimension.

In the economic literature cultural value is classified in use and non-use value. The first encompasses value attributed by people who directly use the cultural assets; the latter is the value recognized by people who not directly consume the cultural good (not users); it is composed of 3 dimensions: the option, the existence and the bequest value.

Option refers to the possibility that non-users reserve for themselves for future use; existence is assigned on the basis of the intrinsic value existing independently from use; the bequest refers to the value for future generation.

Beside that dimension of use and non-use value, it is possible to observe an eco-systemic value deriving from the service that cultural assets provide in terms of socio-economic impacts and externalities.

The eco-systemic value includes both use and non-use, but it is the proper dimension where non-use can be exploited. Sustainable exploitation of non-used built heritage is a challenge that requires a strategic and participative approach and vision to governance and marketing related-issues.

Cultural heritage represents a key of success for sustainable development. Defined not only by the presence of inestimable cultural sites and assets elsewhere lost, but in also by long-lasting traditions and by an unique local collective identity, cultural heritage represents a strategic asset not only in the field of tourism, but also in many other circumstances.

³ “Cultural heritage evaluation: a reappraisal of some critical concepts involved”, M.IACOB, F.a ALEXANDRU, M. KAGITCI. G. CREȚAN, F. IORGULESCU



If conveniently planned, equipped, managed and promoted, historic built heritage can be an effective drive for growth and for the synergic exchange of interests between public and private parties. At the same time, cultural identity values are key-factors in the development process as they ensure participation and sharing. This great occasion for development is even more exploitable in European regions featuring a relevant ensemble of tangible and intangible cultural assets capable of attracting public international interest because of their history and traditions, but several constraints obstruct the take-off and success of such a development pattern.⁴ Among the obstacles we can mention, for example, the high costs for conservation and revitalization, the difficulties in defining effective management and marketing strategy, the bureaucratic contexts, the barriers in the communication among different levels of stakeholders, as well as, the hazard of searching for potential investors, when public resources are not adequate.

It is necessary to support the governance approach and the processes of participation by reducing the barriers between offer and demand, supporting investments in the field of culture as integral part of territorial attractive dimension.

Investments and plans of both preservation and adaptive re-use of cultural built heritage have habitually been made by the professionals and experts in the matter, forgetting that such decisions have significant socio-economic effects and consequences, that calls for stakeholders and community pro-active involvement.

In this perspective a participated governance is the proper approach to both management and marketing of cultural heritage. If the purpose is developing sustainable tourism, it means building new partnership models between tourism and culture and promoting closer linkages between tourism, living cultures and creative industries. Several networking

⁴ See: Interreg project CULTEMA



experiences in the EU resulting into Card or Pass mechanism demonstrates that also not used assets, can be exploited through tourist visit. Medieval Ruins can become attractive simply as a fascinating and romantic ruins. An interesting example in this sense is the Scottish Heritage Pass, that allows Free access to more than 120 sites across Scotland, the majority of them are ruins.

People are increasingly willing to visit historic sites and appreciate landscapes with cultural ruins heritage. Such places tend to be a source of spiritual renewal, a place to learn, to gain understanding and to draw inspiration. Ruins cannot be fully used as a building but regardless of loss of this practical utility, historic ruins have another kind of value. Ruins are irreplaceable material of cultural and historic knowledge. ⁵

Often located in scenic landscape, ruins have a valuable aesthetic value interconnected with the context and other environmental elements.

Ruins can be preserved in the status they are or let to decaying if no investments are ensured. The alternative of restoration (adaptive reuse) is not always appropriate. When resources are allocated for the maintenance, then community must be engaged in the overall cultural and tourist strategy, as well as a governance and management structures should be clearly established to ensure sustainability of the investments.

Ruins are a pivotal element of the landscape, with a great scenic value, that must be maintained rather than reconverted to other use, because those new use needs interventions that often change completely not only the shape and its main features, but also the sense of the heritage itself and of the place. The loss of sense implies the loss of eco-systemic value and represents a not convertible process that cause a damage to the wide socio-economic context.

There is a limit beyond which, no form of ad hoc reuse is imaginable, as any new economic use would require an intervention so impactful as to lose any form of cultural value. Even if the policy is: non-use, but maintain, a marketing management plan is necessary, independently

⁵ Historic ruins – an important landscape element, Lauma Muceniece, Latvia University of Agriculture



from the purpose of it: tourism, audience development, education and consensus-building are the key-pillars

Cultural heritage: a common good

Cultural heritage is a common good shared by a community benefiting from it. It is a key to local development, contributing to improve the quality of life of that community, and ultimately producing integration, social cohesion and a sense of belonging.⁶

The dynamic and increasing participated role of the civil society in a leading environment of sustainable development, shared prosperity, peaceful, fair and inclusive societies is effective if there is a genuine implementation of innovative perspectives on human rights and democratic governance. We have to acknowledge that in the last decades the cultural heritage as a whole in terms of all its multi-disciplinary features, has acquired an unanimously social political and economic features as a mankind's resource. This has been endorsed by the Council of Europe's Faro Framework on the Value of Cultural Heritage for Society that was announced in 2005 and it entered into force in June 2011.

The innovative vision of this Convention is the new approach of the "heritage community", reframing the existent relations between all involved public and private stakeholders in the management, preservation, enhancement and fruition of cultural heritage sites, pointing out the proactive role of the inhabitants in a new dimension of heritage-led and people-centred actions. This is the new approach that empowers communities to take an active role in decision-making towards direct democracy and contributing to policy and strategy making regarding their local resources.

⁶ EENC , M. Sani, Participatory governance of cultural heritage Ad hoc question April 2015



It is relevant to draw the attention of the reader on the definition of cultural heritage provided by the Faro Framework Convention: “a cultural heritage is a group of resources inherited from the past which people identify, independently of ownership, as a reflection and expression of their constantly evolving values, beliefs, knowledge and traditions. It includes all aspects of the environment resulting from the interaction between people and places through time”. The breadth of such a definition is immediately evident, justified by the aim pursued by the Convention, which is to highlight the contribution of cultural heritage to the construction of a democratic and peaceful society, its sustainable development and the promotion of cultural diversity. This instrumental character is underlined by the reference to heritage as a resource, whose protection should not be considered a final goal in its own right but be framed in a broader vision as a means to contribute to the sustainable development of society. This is the leitmotiv that should lead the current policy makers to consider the instances and the expectation of the civil society and of the single citizens, which nowadays have an increasing awareness of the importance of the fruition of the cultural heritage, taken into account in its tangible and intangible dimension, as key element of the wellness of the citizens itself.

The challenge of the new generations of our Millennium, in particular for those who are either managing and enhancing the cultural heritage sites (owners, public and private managers, administrators, Steering Committees.....) is to make irreversible and further empower the shift of the "centre of gravity" of attention from the cultural heritage in itself considered to people, their relationship with the surrounding environment and their active participation in the process of recognition of cultural values, placing heritage as an essential resource at the centre of a vision of sustainable development and promotion of cultural diversity for the construction of a peaceful and democratic society of the 21st century.



In fact there is an inescapable need to foster a process of "capacity building" and economic development through the strengthening of cultural heritage as a fundamental driving force of economic development at the local level, with a multilevel impact that embraces the fields of culture itself, society and territory, founded on the sustainability of its growth and on the enhancement of human cultural heritage, which emerges this new and significant human dimension in the management and enhancement and exploitation of cultural sites. From here we talk about the governance of cultural sites in a cohesive and synergistic intertwining of the economic, social and cultural component with the new dimension of a participatory approach of the civil society and the main public / private actors directly or indirectly involved in the management, enhancement and use of cultural sites.

Needs, demand and uses

In the wider framework of governance and management of cultural heritage sites there is the need to assess carefully the strategic and economic dilemmas of heritage sites conservation projects. It has to be defined in a more holistic assessment scenario of relational database for areas, sites and objects, differentiated by typology, size, quality and ambition.

The assessment of needs and demands is the first task of the public or private body/institution being responsible for the cultural heritage site - to make sure if there is a specific need for investments and related measures of actions. It will be an assessment of the current as well as the targeted demand - and this will be stated in a quantitative and qualitative dimension. The assessment will include the situation of offers as well as demand, quality standards, performance requirements and framework conditions.



Main aspect in this context is to have a long-term perspective in the assessment - to make sure that you have a secured occupancy rate - to have an ongoing and adequate demand for the whole project lifetime of usage of the cultural heritage facilities. Resulting from this, it becomes important to not only assess the current socio-economic context, but also to assess future socio-economic developments. Moreover, it is not enough to concentrate the examination on the single project or on local level but to include as well structural changes in the wider area, considering a more comprehensive holistic approach. Aspects, such as the potential development of the area and the demographic changes become relevant as well.

After the phase of the assessment of the demand, a second pivotal task will be to point out the required investments to provide/modify the destination of use and or the multifunctional utilization of the cultural heritage assets and this asks for an accurate analysis of the object and the area - status quo and necessary innovations. It needs to be examined how the cultural site's management is capable to handle the future demand.

Main idea of the analysis is to point out the required investments in a functional and result-oriented way including a description of necessary tasks, specification of the function and its purpose. In this stage, the analysis should not include any elaborations of methods on 'how' to tackle the demands and to provide certain services - this should be the result from private offers. *(The strategy behind this is to give as much flexibility as possible to elaborate implementation strategies - as this seems to produce the more efficient solutions.)*

Usually the **architectural structure** and the embedding of the cultural heritage site in the **urban context** are important aspects for public authorities. Therefore, these aspects will also be part of the required



measures - also described in a functional and output oriented way to point out the minimum standards.

In combination with the proof of financial profitability, the proof of financial feasibility is a crucial assessment: Even if a project promises to be financially profitable, this does not necessarily mean that it is also financially feasible - that the public authority can financially realise the project.

For the financial feasibility it is crucial in how far the financial planning is compatible with the available budget and business plan of the investment. The development and implementation ask for a multi-annual budget which could last over 20-30 years. The lifecycle costs of the management of cultural sites have to be determined and those costs and revenues have to be identified which influence the long-term business plan on the long run/during the implementation and running of the object.

Resuming, we have to take into account:

- Relevance index of the key elements and features of cultural heritage sites within the modelled development scenario;
- The current demand for investment;
- The expected yearly maintenance costs in comparison with the estimated potential revenues of the sustainable usage of the historical site;
- The impulse period (the period after which new investment is required).

An accurate assessment of the above-mentioned elements may lead to quality enhancement, clever and virtuous sustainability and broad preservation of cultural heritage. The calculated results can justify further actions and commitment of funds and the following verification



and assessment of the results of these actions. This approach may be used as an argument generator in policy making process. It is the first input for business case scenarios, key tools in the planning of future functions in the existing real estate. It may also be an economic reference and administrative base for the future site management.

It is a moderate and cautious approach. You start modelling the situation as it is and by testing various development scenario's you will acquire a sense of the actual potential of your heritage site. The most relevant strategy for development will step by step become clearer.

This step by step approach may validate the viability of different sizes of the projects, from one object development through to the large area development projects.

There is always a danger that by developing the commercial utilization will take over the monumental quality of heritage sites and objects. We should know in advance what are the possibilities. We cannot or should not earn money on all, but we should do it wisely on some of the cultural and environmental heritage sites.

It has to be taken into account not only the estimation of possible investments and income, but also the definition of a limit of development. The development is seen as positive if it is capable to fund the conservation of the overall site. Overdevelopment is not appropriate and is harmful to the monumental value. In several cases the preservation of the status-quo with moderate and non-invasive interventions of preservation of the heritage site have been the wisest choice.

Cultural heritage management VS cultural tourism marketing: the need of a governance structure

Managing a cultural site is something different from developing a tourist destination. Cultural sites management plan and tourism marketing



strategy are two faces of the territorial sustainable development approach and are strictly connected when the site is the main attractor of a destination, both needs participation of stakeholders and community sharing.

Cultural participation has a long tradition: since 1960s it has been considered a fundamental concern in several documents of international organizations such as United Nations, UNESCO, Council of Europe. Through a cultural democracy approach, cultural diversity has been affirmed. In the following years, other concepts were added, such as access to culture, cultural animation, mediation, local cultural development audience development. However, the term ‘cultural participation’ has changed through time, and definitions then depended on authors and contexts in which participation is discussed. Instead, the concept of participatory governance refers to the sharing of responsibilities among different stakeholders who have ‘a stake in what happens’⁷. The stakeholders can be local administrations, public institutions, nongovernmental organizations, civil initiatives, local community representatives, artists and others.⁸

The participatory governance model implies a process of capacitating for collective decision making. The central point of the concept of participatory governance is power relations.

In the *Guide to Effective Participation*, David Wilcox (1994) elaborates key ideas on participation: which should be developed step by step from information, consultation to deciding together and acting together supporting independent community interests. Participation does not simply happen, it is planned and initiated and in somehow who initiates the process, decides on the level of participation of others. The purpose

⁷ Wilcox, 1994: 5

⁸ “Do it together”, edited by Dea Vidović



of participation is mostly related to empowering citizens and community but participating implies specific roles of practitioners, those actively involved in participation, and of stakeholders. Not all involved need to have equally capacities, resources or confidence, but it does not mean that partnership cannot be developed or that partners do not complement each other.

The main result of a participative process leading to a shared governance is the establishment of a new organization and the definition of the set of policies and rules supporting the operation of it. In case participated governance refers to cultural site management, the new organization could be shaped in the form of a foundation for example, whereas in case it addresses the overall tourist destination it is called DMO, notably Destination Management Organization.

As explained by the UNESCO toolkit on sustainable tourism, destination management usually requires partnership working across the tourism, transport, infrastructure, leisure and conservation sectors. A cultural destination requires consensus and integrated capacities of professionals from different sectors.

It is a great challenge to build the management structure appropriate to the size and scale of the destination, capable to encompass contemporary environmental, economic, social, and cultural concerns. Much more open and inclusive is a management structure, the most effective is the plan. It is pivotal that a significant number of people in the destination and hosting community play a vital role in setting the strategy, delivering actions and activities, and monitoring progress. Good governance for cultural sites and tourist destination requires a sustained process of interaction and in-depth knowledge of destination insights and features.

