



**Slovenian Presidency of the Council of the European Union**

# Staying alive: Heritage sustainability first!

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**IRMO**

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## EU and cultural heritage sustainability

- The issue is of great importance to the whole EU area, especially after a recent economic downturn due to COVID-19
- Sustainable development - part of the core values of the EU for more than 20 years
- The EC Sixth Report on economic, social and territorial cohesion - a stronger emphasis on sustainability, as an explicit objective of cohesion policy
- The increasing focus on sustainable growth also mirrored in the Europe 2020 strategy
- 2021-2027 – green deal (environmental sustainability)



## The problem

- Sustaining the effects of investments remains one of the most burning problems in the management of cultural heritage
- Many cultural institutions have difficulties to cover even basic maintenance costs
- The usual scenario is: when the public funding is over, everything is over
- How do institutions sustain their work for the future? How do they get funds for their future functioning? How can public policies support beneficiaries in the self-sustainability of their projects?

## The goal

- To improve public policies in the cultural heritage sector in terms of delivering high quality projects that allow results **to remain sustainable** with reasonable public funding and have long-lasting impact on regional development
- Both policy organisations and cultural institutions should plan for sustainability long before the project start date



## Cultural heritage values

- Cultural heritage is often valued for its **instrumental values**, contributing to tourism, urban development, entrepreneurship or to put it simply, economic development in general
- Its **intrinsic values** are often overlooked although without them, heritage itself may easily cease to exist thus also diminishing its developmental role (aesthetic, scientific, educational, economic, cultural, landscape, community, uniqueness)





**Cultural heritage sustainability is a must.**



# Sustainability of cultural heritage



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## Complexity of cultural heritage sustainability

- ECONOMIC PRESSURES - heritage conservation and its management is expensive (it often requires specific techniques, materials as well as skills to keep the asset in as much as close to its original condition; contemporary management requires substantial financing for daily operations)
- SOCIO-CULTURAL PRESSURES – e.g. modernisation, public perception of heritage values
- ENVIRONMENTAL PRESSURES – natural (earthquakes, volcano eruption, floods, carbon emissions, invasive plant species, etc.) and social (visitor control)
- POLITICAL PRESSURES - heritage as source for political manipulation (e.g. colonial past, dictatorship – contested or dissonant heritage)
- PRESSURES RELATED TO HERITAGE VALUES – poor maintenance, over-exploitation for tourism purposes, use of false or incorrect historical data, staging unauthentic experiences, loss of community connection with a heritage asset, appropriation of the right to heritage



# The usual challenges and responses to cultural heritage sustainability

| General pressures | Specific challenges  | Usual responses to challenges   |
|-------------------|--|---|
| Financial         | Lack of funding  | Direct funding (grants, inheritance, sponsorships/donations, membership, co-branding activities, crowdfunding; retail; accommodation and catering; events; private hire/rentals; interpretation; user fees)   |
|                   | Modernisation  | Appropriate use of the asset; use of technology; compromising   |
| Socio-cultural    | Standardisation  | Use of creative and innovative context-specific methods   |
|                   | Public perception  | Awareness raising and educational activities; visiteering (volunteering activities); living heritage activities   |
| Environmental     | Natural pressures (natural disasters – earthquakes, volcano eruptions, floods, invasive plants, carbon emission) | Digital preservation of heritage; long-term strategic plans for reducing negative environmental impacts; use of environmentally friendly material and equipment in the renovation and maintenance; regular monitoring of the site; control, management and combat of invasive plants, their eradication and replacement with non-invasive species; application of eco-friendly and renewable energy systems |
|                   | Social pressures (over-visitation; looting)  | Application of visitor management frameworks and tools; use of technology; application of international legal frameworks against looting; use of drones to combat heritage looting and scanning satellite photos of heritage  |
| Political         | Contested/dissonant heritage   | awareness raising campaign and educational activities; engaging an external and unbiased expert   |

## How to ensure and measure heritage sustainability?

- A lack of universal heritage sustainability indicators
- Project level and policy level
- The aim - to offer methods of measuring and evaluating heritage sustainability



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## Research methodology

- The research conducted on:
  - good practice examples analyzed in Greece, Italy, the Netherlands, Poland, Portugal, and Spain as a starting point (further expanded to other countries)
  - related EU, regional, or local policy instruments
- The methodology, which explored possible indicators for evaluating the sustainability of cultural heritage investments, involved:
  - desk research and ex post analysis of selected heritage projects funded within a policy instrument
  - interviews with cultural heritage managers, focus groups, and comparative analysis of best practices analyzed



## Asti Museum Foundation, Italy



## How to ensure stable funding?

- How to find a functional way of managing network of five museums?
- financial difficulties and a weak museum management
- **Asti Museum Foundation** established - the Municipality of Asti and the Asti Saving Bank Foundation
- The Bank donates € 800.000,00 each year to the Asti Museum Foundation
- all the revenues coming from the museums must be reinvested in other cultural projects in Asti
- raise the attractiveness of the museums for wider audience – **blockbuster exhibitions** e.g. Marc Chagall





# Museum of Flax – Ecomuseum of Ribeira De Pena, Limões, Portugal



## Ensuring stable partnerships

- **storytelling**
- **interesting scenography** - visitors are guided through the museum by the cycle of the flax which leads them to the Weaving Group
- **multimedia**
- **authenticity**
- involvement of the **local community**
- **Management partnership** - protocol between the Municipality of Ribeira de Pena and CACER – Cooperative of Cerva's Artisans which ensures that all strategic decisions are made in consensus; operational management in the hands of Ecomuseum Technical Office

## Parador de Santo Estevo, Ourense, Spain



## Ensuring restoration and operation

- Santo Estevo Monastery used for commercial purposes – hotel
- **Management:** Paradores de Turismo de España - a public, state owned chain of Spanish luxury hotels, which runs hotels in adapted castles, palaces, fortresses, convents, monasteries and other historic buildings
- **Other activities:** different cultural events, such as exhibitions, concerts, performances, etc.
- Environmentally conscious, impact on the social life of a local community, employment opportunities





## Soete Moeder, Den Bosch, The Netherlands



## **Adaptive re-use: heritage not only for tourism but for local community, too**

- increasing secularization leads to the religious heritage demise
- repurposing the monastery of the Sweet Mother Mary for the hospitality services + restaurant focused on sustainable dishes
- environment of the cloister opened up to the public
- a venue for on-the-job education for people from all walks of life
- ownership and running done by a private party





## Citadelle (a fortress) in Arras, France



# Heilige Hartenkerk, Eindhoven

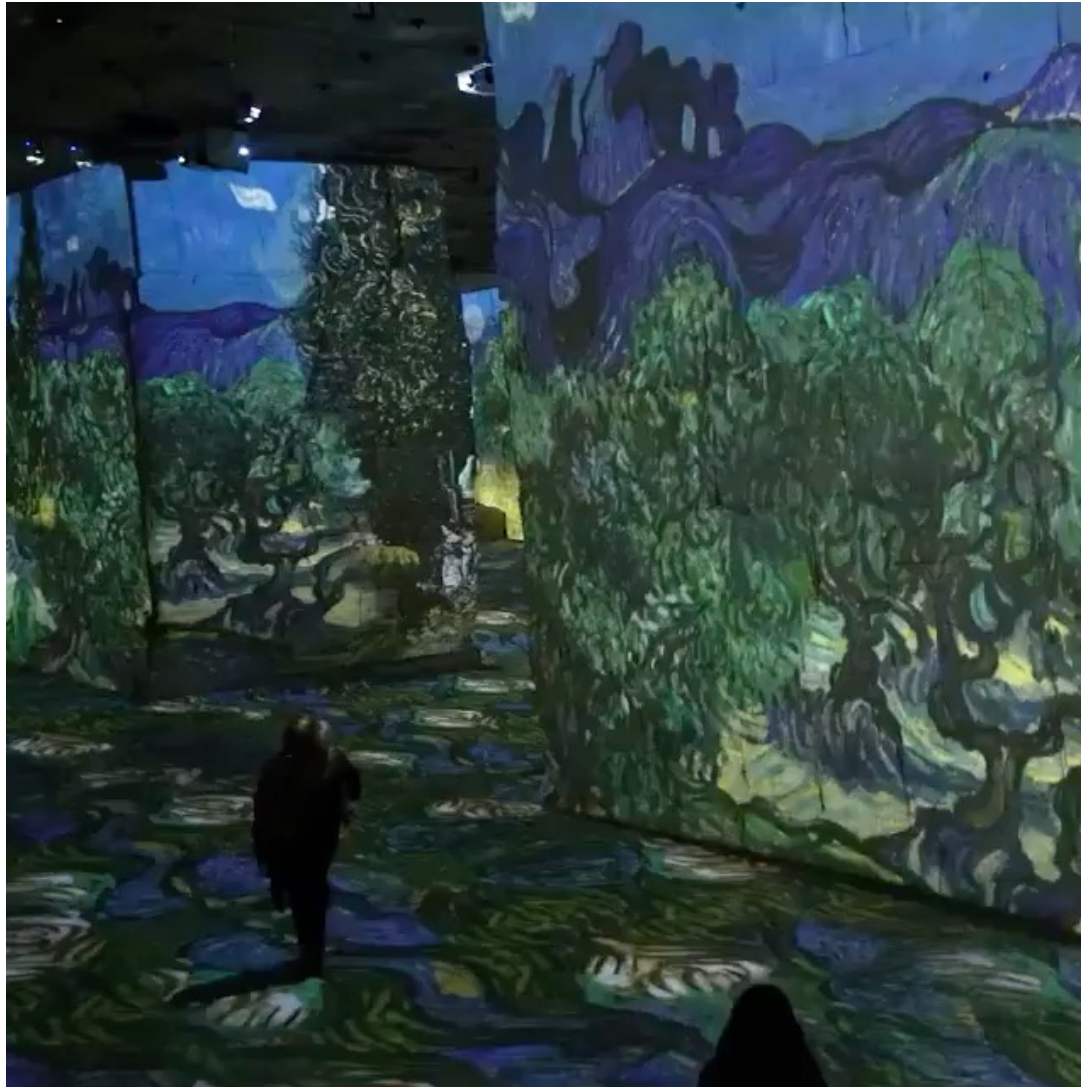




## 19de eeuwse kapel, Kruibeke - loft



# **Skillful interpretation – making visitors part of the heritage**



## How to ensure heritage sustainability: Main findings

- Crucial importance of cooperation and broad participation of various stakeholders
- Skillful heritage management
- Diversification of funding sources
- Community involvement and appropriation of cultural heritage by the community
- Respect for professional standards
- Innovative solutions
- Careful spatial planning
- Challenge: **transferability** of good practice examples because heritage usually depends on the local context
- In order to be able to measure heritage sustainability at the project level, an all-encompassing set of cultural heritage sustainability indicators is proposed
- To justify heritage investments, policy instruments may consider future priorities based on this set of indicators, thus furthering also heritage values and community rights for overall development based on heritage



# Proposed set of heritage sustainability indicators – Economic sustainability (1)

| Sustainability area     | Specific area |                          | Measures   | Indicators   |
|-------------------------|---------------|--------------------------|--|--|
| Economic sustainability | Governance    |                          | Existence of policy settings and instruments related to heritage                 | Local/regional/national/international policies impacting heritage sustainability   |
|                         | Management    | Planning                 | Existence of institutional strategic planning frameworks                         | Institutional management plans<br>Level of institutional capacities to implement existing management plans   |
|                         |               |                          | Risk management  | Number of risks defined<br>Risk management plans   |
|                         |               | Product development      | Innovative heritage-related product development                                  | Number of new developed heritage products<br>Number of spin-off products, related services and experiences   |
|                         |               |                          | Targeted education and training measures for the purposes of cultural production | Number of trainings<br>Number of trained persons   |
|                         |               |                          | Availability of funding and investment for product development                   | Number of funding sources<br>Available amounts   |
|                         |               |                          | Capacities for action in transforming ideas, content, values into products       | Number of creative and innovative heritage products<br>Number of professionals with creative capacities  |
|                         |               |                          | Access to infrastructure and means of production                                 | Number of available and accessible spaces and equipment  |
|                         |               |                          | Capacities for active appropriation of cultural forms                            | Number of products accepted and further promoted by the employees, community and visitors  |
|                         |               | Financial sustainability | Availability of funding  | Number of funding sources  |
|                         |               |                          | Diversity of forms and modes of funding  | Number and amount of realised direct funding (e.g. grants, sponsorships/donations, memberships, co-branding activities, crowdfunding; retail; accommodation and catering; events; private hire/rentals; interpretation; user fees, etc.) |

## Proposed set of heritage sustainability indicators – Economic sustainability (2)

| Sustainability area | Specific area              |                      | Measures   | Indicators  |
|---------------------|----------------------------|----------------------|--|---|
|                     | Management                 | Marketing            | Marketing planning   | Marketing plans   |
|                     |                            |                      |  | Promotional plans   |
|                     |                            |                      | Audience and consumer demographics (market segmentation)       | Lists with description of market segments   |
|                     |                            |                      |  | Number of targeted markets  |
|                     |                            |                      | Correlation of values with demographics (product segmentation) | Lists of products to be matched with targeted markets                               |
|                     |                            |                      |  | Number of heritage products matched with targeted markets                           |
|                     |                            |                      | Positioning (branding)   | Number of branded heritage products and experiences                                 |
|                     |                            |                      |  | Level of connection between heritage brands and community identity                  |
|                     |                            |                      |  | Number of facilities, venues and networks for building the heritage brand awareness |
|                     |                            |                      | Adequate pricing   | Number of products/services/experiences purchased                                   |
|                     |                            |                      |  | Number of pricing methods applied   |
|                     |                            |                      | Distribution and promotion                                     | Number of distribution channels used  |
|                     |                            |                      |  | Number of communication channels used   |
|                     |                            |                      |  | Number of media engaged   |
|                     |                            |                      | Institutional capacities for action in this regard             | Number of heritage professionals engaged in marketing activities                    |
|                     |                            |                      |  | Level of marketing knowledge of professionals engaged in marketing activities       |
|                     |                            | Interpretation       | Appropriate selection of interpretation media                  | Number of (innovative, multisensory) interpretation media used                      |
|                     |                            |                      |  | Number of satisfied heritage visitors/consumers                                     |
|                     |                            |                      |  | Level of heritage interpretation understanding                                      |
|                     |                            |                      |  | Number of interpretation media targeted to people with disabilities                 |
|                     | Human resources management | Employees management | Range and availability of human capacities                     | Number of skilled and knowledgeable employees                                       |
|                     |                            |                      |  | Number of heritage management areas covered by skilled and knowledgeable employees  |
|                     |                            |                      |  | Number of annual sustainable heritage management trainings for employees            |
|                     |                            |                      | Employees' stimulation   | Amount of extra-budgetary funds raised for employee financial stimulation           |
|                     |                            |                      |  | Number of assigned financial awards for employee merit                              |
|                     |                            |                      |  | Number of days off awarded to employees for long working hours                      |
|                     |                            |                      |  | Number of new job openings  |
|                     |                            |                      | Other forms of cooperation                                     | Number of volunteers engaged  |
|                     |                            |                      |  | Number of volunteering programmes   |
|                     |                            |                      |  | Number of partnerships with volunteers  |



# Proposed set of heritage sustainability indicators - Economic sustainability (3)

| Sustainability area | Specific area              |                            | Measures   | Indicators  |
|---------------------|----------------------------|----------------------------|--|---|
|                     | Human resources management | Visitor management         | Audience reach and development   | Number of (innovative) audience development strategies applied<br>Number of heritage visitors<br>Share of heritage visitors in total local/tourist population and compared to other selected and relevant heritage attractions  |
|                     |                            |                            | Visitor control  | Application of visitor management frameworks, e.g. Recreation Opportunity Spectrum (ROS), Tourism Opportunity Spectrum (TOS), Urban Tourism Opportunity Spectrum (UTOS), ECOS, Indigenous Peoples' Cultural Opportunity Spectrum for Tourism (IPCOST), Interpretation Opportunity Spectrum (IOS), Limits of Acceptable Change (LAC), etc.<br>Application of visitor management tools, e.g. flow and congestion control, physical barriers between visitors and artefacts, limiting visitor contact with artefacts, price increase, stimulation of off-season visits, visitor movement paths' diversification, diversification of supply, use of technology for heritage conservation and interpretation, engagement of visitors and getting to know your visitors |
|                     |                            |                            | Extent to which consumption trends and patterns are sustainable                | Number of expert opinions asked<br>Level of harmonisation of heritage management plans with the consumption trends and site capacities  |
|                     |                            |                            | Ways and extent to which consumption affects and modifies behaviours           | Number of newly introduced sustainable consumption strategies<br>Number of heritage visitors/consumers with modified behaviour  |
|                     |                            | Local community management | Community involvement  | Number of local community members participating in heritage-related activities<br>Number of local community members offered the opportunity to distribute their products/services at a heritage site<br>Number of local community members' products/services offered at a heritage site   |
|                     |                            |                            | Partnership capacity   | Number of partnerships with local community members established<br>Number of partnership platforms offered by a heritage site   |
|                     |                            |                            | Community cohesion and social inclusion  | Number of common community initiatives related to heritage<br>Number of marginalised and disadvantaged communities involved   |
|                     |                            |                            | Contribution of heritage activities to sustainable social and cultural capital | Number of heritage-related traditions/customs/knowledge preserved<br>Number of community members passing on heritage-related traditions/customs/knowledge   |
|                     |                            |                            | Respect for cultural identity  | Policy settings and instruments for identity preservation   |
|                     | Monitoring/evaluation      |                            | Existence of monitoring/evaluation activities                                  | Regular monitoring and evaluation reports on annual basis<br>Number of actions taken based on detected needs in the monitoring and evaluation reports   |

# Proposed set of heritage sustainability indicators – Environmental sustainability

| Sustainability area          | Specific area  |  | Measures   | Indicators   |
|------------------------------|--|--|--|--|
| Environmental sustainability | Natural pressures (natural disasters – earthquakes, volcano eruptions, floods, invasive plants, carbon emission, climate change) |  | Digital preservation of heritage   | Number of digitally preserved heritage assets  |
|                              |  |  | Long-term strategic plans for reducing negative environmental impacts  | Number of activities of heritage digitisation  |
|                              |  |  |  | Number of reduced negative environmental impacts   |
|                              |  |  |  | Levels of environmental impacts decrease   |
|                              |  |  |  | Number of disincentives for changes in mobility behaviour introduced (e.g. charging for transport costs, restricted traffic zones, urban tolls, etc.)  |
|                              |  |  |  | Number of incentives for changes in mobility behaviour introduced (e.g. promotion of public transport, financial incentives for public transport users, mobility plans, traffic calming zones, promotion of walking and cycling) |
|                              |  |  | Environmentally friendly renovation and maintenance  | Number of environmentally friendly material and equipment used   |
|                              |  |  | Control, management and combat of invasive plants, their eradication and replacement with non-invasive species | Number of activities for eradication of invasive plants  |
|                              |  |  |  | Number of eradicated plants  |
|                              |  |  |  | Number of planted non-invasive species   |
|                              |  |  | Carbon emission reduction and impact on climate change   | Level of CO <sub>2</sub> decrease  |
|                              |  |  |  | Number of eco-friendly and renewable energy systems introduced   |
|                              |  |  |  | Number of heritage sites with renewable energy systems introduced  |
|                              |  |  | Regular monitoring of the site for environmental pressures   | Number of adequate sustainable mobility projects introduced  |
|                              | Social pressures (over-visitation; looting)  |  | Application of visitor management frameworks and tools   | Number of monitoring activities  |
|                              |  |  |  | Number of interventions taken as a result of monitoring recommendations  |
|                              |  |  |  | Number of frameworks and tools applied   |
|                              |  |  | Application of international legal frameworks against looting  | Number of visitors after the application of visitor management frameworks and tools  |
|                              |  |  |  | Level of heritage preservation after the application of visitor management frameworks and tools  |
|                              |  |  |  | Number of technological solutions applied to decrease visitation pressures   |
|                              |  |  |  | Number of looted heritage assets after the application of legal frameworks   |
|                              |  |  |  | Number of activities implemented to decrease looting (e.g. police interventions, use of drones, satellite scans, etc.)   |



# Proposed set of heritage sustainability indicators – Socio-cultural sustainability (1)

| Sustainability area           | Specific area     |                        | Measures  | Indicators   |
|-------------------------------|-------------------|------------------------|---|--|
| Socio-cultural sustainability | Modernisation     |                        | Appropriate use of the asset  | Professionally approved licence for use<br>Number of measures taken for ensuring heritage preservation and protection from inappropriate use   |
|                               |                   |                        | Appropriate use of technology   | Measured level of preservation after use of technology (annually)  |
|                               |                   |                        | Appropriate compromising  | Professionally approved licence for taking compromising measures<br>Measured level of preservation after compromising measures taken (annually)  |
|                               |                   |                        |   |  |
|                               | Standardisation   |                        | Use of creative and innovative context-specific methods   | Number of unique and innovative solutions taken to avoid standardisation   |
|                               | Public perception |                        | Awareness raising and educational activities of the value of heritage   | Number of awareness raising campaigns/educational activities<br>Number of trained members of community   |
|                               |                   |                        |   |  |
|                               |                   |                        | Visiteering (visiting volunteering activities) and living heritage activities/events                          | Number of visiting volunteers/visitors and or performers to living heritage events<br>Number of volunteering activities/living heritage events organised<br>Increased affection towards heritage   |
|                               |                   |                        |   |  |
|                               | Heritage values   | aesthetic and artistic | Professional and appropriate preservation, protection and use heritage  | Number of actions taken to preserve and protect heritage assets' aesthetic value<br>Number of heritage assets with preserved and protected aesthetic value<br>Level of enjoyment in heritage by its users  |
|                               |                   |                        | Decreasing excessive visitation   | Number of visitors using/visiting heritage<br>Number of activities taken to decrease excessive visitation<br>Artistic worth of heritage asset estimates  |
|                               |                   |                        |   |  |
|                               |                   |                        |   |  |
|                               |                   | historic               | Historic identity preservation  | Number of existing stories on historic people/events<br>Number of historic re-enactment events<br>Number of awareness raising campaigns/educational activities   |
|                               |                   |                        |   |  |
|                               |                   |                        |   |  |
|                               |                   | cultural               | Cultural heritage related cultural events, activities and other heritage practices (e.g. intangible heritage) | Number of events/activities<br>Number of participants in events/activities<br>Number of other heritage practices engaged   |
|                               |                   |                        | Cultural heritage presence in artworks, stories, films, music compositions, design, etc.                      | Number of new heritage related cultural productions<br>Number of consumers of newly produced cultural heritage related products<br>Interest raised by new heritage related cultural productions  |
|                               |                   |                        | Religious or spiritual importance   | Number of religious or spiritual services/activities performed in a heritage asset<br>Number of participants in religious or spiritual services/activities performed in a heritage asset<br>Increased well-being of participants in religious or spiritual services/activities |
|                               |                   |                        |   |  |
|                               |                   |                        | Extent and use of infrastructure for purposes of cultural creation  | Number of artists/community members/visitors using heritage infrastructure for cultural creation   |
|                               |                   |                        |   |  |
|                               |                   |                        |   |  |

## Proposed set of heritage sustainability indicators – Socio-cultural sustainability (2)

| Sustainability area | Specific area   |             | Measures  | Indicators  |
|---------------------|-----------------|-------------|---|---|
|                     | Heritage values | educational | Heritage literacy and educational attainment  | Number of educated participants in topics related to heritage   |
|                     |                 |             |   | Number of (in)formal educational activities related to heritage   |
|                     |                 |             |   | Level of knowledge related to heritage  |
|                     |                 |             | Use of heritage infrastructure, equipment and interpretation tools for educational purposes | Number of educational programmes in heritage assets   |
|                     |                 |             |   | Number of participants using heritage infrastructure, equipment and interpretation tools for educational purposes |
|                     |                 | landscape   | Connection of cultural heritage with the surrounding landscape                              | Existence of professional spatial planning documents  |
|                     |                 |             |   | Number of activities related to heritage landscape protection   |
|                     |                 |             |   | Level of heritage landscape preservation/protection   |
|                     |                 |             |   | Registration of heritage in national /international registers as a cultural landscape                             |
|                     |                 | scientific  | Research and knowledge related to heritage  | Number of research projects related to heritage   |
|                     |                 |             |   | Number of researchers participating in heritage-related research activities                                       |
|                     |                 |             |   | Number of published papers, master's and doctoral dissertations related to heritage                               |
|                     |                 | uniqueness  | Preservation of uniqueness of heritage  | Number of unique features   |
|                     |                 |             |   | Registration of heritage in national /international registers   |
|                     |                 |             |   | Number of heritage brand awareness and promotional activities   |

# Proposed set of heritage sustainability indicators – Political sustainability

| Sustainability area      | Specific area                |  | Measures  | Indicators   |
|--------------------------|------------------------------|--|---|--|
| Political sustainability | Contested/dissonant heritage |  | Change of perception towards contested/dissonant heritage | Number of heritage sensitisation activities                          |
|                          |                              |  |   | Number of educated opposing political stakeholders/community members |
|                          |                              |  |   | Provision of external and unbiased expertise                         |

**The need of monitoring both on the project as well as  
policy level!**

# Interreg CENTRAL EUROPE



European Union  
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**ForHeritage**

**ForHeritage: Excellence in heritage management in  
central Europe**

## About ForHeritage

- **Aim:** capitalising on existing knowledge from previous projects related to integrated approaches for the effective management of cultural heritage
- **Approach:** new tools implemented through pilot actions
- **Topics:** participatory governance/management, public-private cooperation, heritage funding, heritage impact assessment, heritage training, pilot actions
- **More:** <https://www.interreg-central.eu/Content.Node/ForHeritage.html>



**In this way, not only sustainability of cultural heritage is ensured, but it also impacts regional development, raises awareness of heritage value and consequently community rights to it.**

# Thank you!



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