Steering Committee Meeting  
16th and 17th of October, 2014  
Krakow
STATE OF THE ART

### MACRO
- Draft report is almost completed (additions: environmental impact and explanation holistic diagram + to be merged: contribution of Katarzyna)

### MESO
- Draft report to be discussed

### MICRO
- Case study Mechelen is completed
- Data collection (survey) on Europa Nostra Laureates is completed; until now 69 respondents, but still open for new entries
MESO: outline

**Aim**

→ Link results of the macro level report (policy/discourse shift) to research that is carried out at European level

1970s

heritage as a “capital of irreplaceable cultural, social and economic value”

1990s

Object oriented approach → value oriented approach

Immovable heritage → all inclusive historic urban environment

Policy documents on cultural heritage: “sustainability” and “development”

2013

Culmination: Hangzou Declaration / Culture = 4th pillar

2014

EU Council conclusions + European Commission (COM(2014) 477 final)

**INTEGRATED AND HOLISTIC APPROACH TO HERITAGE**

**Approach**

Deliver a mapping of European researches and studies on the impact of immovable heritage: Focus of collected studies? Impact domains?
MESO: outline

**Tool**

- Questionnaire targeting mainly public authorities, cultural organisations and research institutions in the European Union
- To collect individual studies on the impact of immovable heritage and respective data: content, scale, methodology etc.

**Timeframe!**

- SurveyMonkey / an online survey development cloud based company
  - capacity to conduct ad hoc data analysis
  - sample selection
  - bias elimination
  - simple queries in the complete set of collected data
  - a digital database of the collected European studies
MESO: outline

Results

330 studies entered in the survey tool by both ICC and RLICC

Studies were entered by external researchers, but the larger part was entered by the researchers on the project

MAPPING = NOT ABSOLUTE OR COMPLETE

Depends on the quality of reply, willingness and competencies of respondents

Reasons

1. Mapping process = not only a means to collect data
   Process of collecting existing studies = equally important
   → a sense of awareness for the impact of immovable heritage

2. CHCfE = a policy-oriented research
   Aim = “produce a credible basis for policy recommendations that reflect an integrated and holistic approach towards the increased importance of heritage in today’s society”

3. Mapping progress = preliminary mapping
   Need = systematic data on the impacts of heritage
   → tool or format can be transferred to different webpages for future continuation
MESO LEVEL: RESULTS

Evolution towards a more holistic approach
MESO LEVEL: RESULTS

Evolution towards a more holistic approach

Amount of studies collected: social domain

Amount of studies collected: economic domain

Amount of studies collected: cultural domain

Amount of studies collected: environmental domain
MESO LEVEL: RESULTS

Evolution towards a more holistic approach

On which impact domain(s) does the study focus?

- Cultural: 61.2%
- Economic: 75.7%
- Social: 55.3%
- Environmental: 20.7%
MESO LEVEL: RESULTS

The “4 pillar approach”

Interrelation of all 4 impact domains

- One domain: 36.59%
- Two domains: 29.34%
- Three domains: 26.81%
- Four domains: 7.26%
MESO LEVEL: RESULTS

The “4 pillar approach”
MESO LEVEL: RESULTS

The “4 pillar approach”

Culture \( \cap \) Social \( \cap \) Environmental \( \cap \) Economic = Sustainable Development
**METHODS**

<table>
<thead>
<tr>
<th>Name</th>
<th>Definition</th>
<th>Examples of studies in European literature</th>
</tr>
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</table>
| **Quantitative methods** | Cost benefit  
Market-based evaluation technique which decision makers use in deciding whether a proposed project should go ahead or not. Cost benefit analysis is carried out to weigh the costs, both financial and otherwise, of proceeding with a project against benefits which would arise from it (Smith 2010: 13) | Ministry of Regional Development and Tourism and the Management Authority for the Regional Program Romania 2012 Witteveen and Bos 2012 |
| Hedonic pricing | Revealed preference method, can be used to measure the effect of a heritage on the land value at various distances from the site. This technique is based on the fact that prices of goods on the market are affected by their characteristics. The estimation of the real estate value and house prices is based on several attributes like surface, comfort, age, number of rooms, and on a freely functioning an efficient property market (Nijkamp and Riganti 2004: 7) | Ruijgrok 2006  
Lazrak et al. 2014  
Lorgulescu F. et al. 2011  
Ahlfeldt, Holman and Wendland 2012 |
| Travel cost     | Revealed-preference method, uses differences in travel costs of individuals making use of a cultural site to infer the value of the site (Nijkamp and Riganti 2004: 7) | Bedate et al. 2004  
Fonseca and Rebelo 2010  
Vicente and DeFrutos 2011  
Tudorache s.d. |
| CVM            | Stated-preference method, expresses total value ascribed by an individual to a heritage site (willingness to pay) (Mason 2005: 17)                                                                          | Ruijgrok 2006  
Wagner 2008  
Schneider and Dreer 2006 |
| Choice modelling | Stated-preference method similar to CVM, but it asks respondents to rank the alternatives, rather than just choose among them (Mason 2005: 17-18)                                                               | Van Loon 2013  
Kinghorn and Willis 2008 |

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**Analysis of the most common applied methodologies in the European collected studies:**

- quantitative methods
- qualitative (non-participatory) methods
- qualitative (participatory) methods
**NAME**

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<th>Methodology</th>
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<tr>
<td><strong>Qualitative methods</strong></td>
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<tr>
<td>Expert analysis</td>
<td>This qualitative method relies on the knowledge and experience of experts in the field, for example by conducting expert interviews</td>
<td>Tuuli 2012, Bradley, Bradley, Coombes and Tranos 2009</td>
</tr>
<tr>
<td>Primary/secondary literature review</td>
<td>The collection of historical documents and review of relevant archives, newspapers, and magazines (primary) or books and journals (secondary)</td>
<td>Tynkkynen 2007, Historic Houses Association 2010, Grubmüller et al. 2008</td>
</tr>
<tr>
<td>Case studies</td>
<td>This method relies on providing narrative examples to disseminate information on results of research</td>
<td>English Heritage 2010, Amion Consulting Limited 2010</td>
</tr>
<tr>
<td>Multicriteria analysis</td>
<td>This non-monetary evaluation method takes into consideration the multiple dimensions of a decision problem. Project effects are addressed in their own dimensions, and a weighing procedure is used to compare or assess the various project effects against each other (Ost 2009: 90)</td>
<td>Ost 2009, Laplanter and Throsby 2011</td>
</tr>
<tr>
<td>Policy analysis</td>
<td>Determining which of various alternative policies will most achieve a given set of goals in light of the relations between the policies and the goals (Stuart 1999)</td>
<td>Karnite 1998, Jaliu 2012, SC Planwek Romania 2012, Jura Consultants 2013</td>
</tr>
</tbody>
</table>
# MESO LEVEL: RESULTS

## Methodologies

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<td><strong>Participatory methods</strong></td>
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<td>REAP</td>
<td>Used to investigate and describe the relation between local communities and park lands, which can be used to describe the interconnection between communities and heritage sites. In a REAP, a number of methods are selected to produce a dataset that can be triangulated to provide a comprehensive analysis of the site (Low 2002: 36)</td>
<td>BOP Consulting 2011, ECOTEC 2010, EFTEC 2012</td>
</tr>
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<td>Participatory mapping</td>
<td>Cartographic practice used to examine the relationships between people and the surrounding landscapes, making use of sketch mapping, participatory 3-D modelling, GPS and GIS (Vandesande 2012: 39)</td>
<td>Fitzjohn 2009, Baiamonte, Bazan and Raimondo 2009</td>
</tr>
<tr>
<td>Cultural mapping</td>
<td>Cartographic practice used to document local cultural tangible and intangible resources (Vandesande 2012: 39; UNESCO 2009)</td>
<td>National Inventory of Architectural Heritage 2006</td>
</tr>
<tr>
<td>Grounded Theory</td>
<td>Inductive method revealing information on cultural valuation processes based on interviews and participant observations (Vandesande 2012: 39; Munhall 2007: 93)</td>
<td>Temel and Dögl 2007, Orange 2012</td>
</tr>
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<td>Ethnography</td>
<td>This method uses interviews and participant observations to reveal data on the cultural values associated with heritage (Vandesande 2012: 39; Low 2002: 31)</td>
<td>Hutchison 2014, Vodeb and Medaric 2013</td>
</tr>
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MESO LEVEL: RESULTS
Methodologies

![Bar chart showing types of data used for the studies]

- Qualitative/quantitative methods: 34.21%
- Quantitative methods: 32.70%
- Qualitative/participatory methods: 33.08%
MESO LEVEL

Results

Scale of the collected studies

- International: 47.80%
- National: 36.79%
- Regional/cities: 11.33%
- Individual sites: 4.08%
MESO LEVEL: RESULTS

Results

Respondent groups

- Public government/agencies: 32.39%
- Cultural organizations: 29.56%
- Research institutions: 28.30%
- Other: 9.75%
MICRO LEVEL

The case-study of Mechelen

How to assess the direct and indirect effects of immovable heritage on society on different levels in the historic city center of Mechelen?

- Survey among 456 inhabitants of the city
- Analysis of 37 indicators in the social, economic, cultural and environmental impact domains
- Unique insight on the inhabitants’ awareness and perception of the historic environment of the city
MICRO LEVEL
The case-study of Mechelen

Profile of the respondents: attitude towards benefits of immovable heritage

- Conserve the original outlook of our cities and landscapes
- Improve the general quality of life
- Provide recreational possibilities
- Education
- Conserve what our ancestors contructed
- Pass something on for future generations
- We have to know the past to understand the present
- Growth of tourism
- Conserve cultural traditions and identity
- Health benefits
- Economic benefits
- Provide an environment of aesthetic high quality
MICRO LEVEL
The case-study of Mechelen

Results of the survey

‘Would you prefer any other building over the Hanswijk Basilica?’
(n=456)

- Hanswijk Basilica: 74.70%
- Football stadium: 2.30%
- Park: 7.30%
- Crèche: 4.90%
- Shopping Center: 3.90%
- Gym: 4.20%
- Other: 2.70%
MICRO LEVEL
The case-study of Mechelen
Results of the survey

‘How much would you pay for to enter the Saint Rumbold’s Tower?’ (n=456)

- Nothing: 0,7%
- 1 to 2,5 euros: 6,6%
- 2,5 to 5 euros: 11,1%
- 5 to 10 euros: 17,3%
- More than 10 euros: 41,2%
- No answer: 23,0%

‘On what would you want your admission money to be spent?’ (n=456)

- Restoration and conservation works: 315
- Projects involving the youth: 142
- Social projects: 120
- Guided tours: 79
- Audioguides: 59
- Others: 23
- Café or restaurant: 133
- No answer: 0,7%
MICRO LEVEL

The case study of the EU Prize for Cultural Heritage/ Europa Nostra Award laureates

- Explore whether or not award winners actually assess, monitor and evaluate their socio-economic impact
- Online survey with 69 respondents
- Gathered data to be analysed

Cultural Heritage Counts for Europe

<table>
<thead>
<tr>
<th>Micro Level - EU Prize for Cultural Heritage / Europa Nostra Awards</th>
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<tr>
<td><img src="image.png" alt="Image of survey questions" /></td>
</tr>
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</table>
MICRO LEVEL

The case study of the EU Prize for Cultural Heritage/ Europa Nostra Award laureates

Has there been any effort to evaluate the project's socio-economic impact?

Answered: 62  Skipped: 7

- Yes: 45.16%
- No: 54.84%
MICRO LEVEL

The case study of the EU Prize for Cultural Heritage/ Europa Nostra Award laureates

How many evaluations of the socio-economic impact of the project have already taken place?

Answered: 23  Skipped: 46

- 1 answer: 56.52%
- 2 answers: 4.35%
- 3 answers: 4.35%
- 4 answers: 8.70%
- 5 answers: 8.70%
- More than 5 answers: 17.39%
OBSERVATIONS

• Recommended that future research focuses on all **4 impact domains** in order to assess and understand the potential of heritage for sustainable development

• In the future, also focus on the impact of **reuse of single sites and buildings** and on the **environmental impact in terms of embodied energy**

• Many studies tend to take the idea that heritage produces benefits for granted, and use this as the starting point of the research, the overall aim should be to **obtain a less biased approach** and acquire a **balanced proportion between the attention attributed to each of the four domains** towards sustainable development

• In Central Europe, studies on the impact of immovable heritage are not yet common practise. Most of the submitted studies deal with a more traditional view on immovable heritage and spatial planning

• In the future, additional attention needs to be focused on a **hybrid, collaborative research, combining quantitative and qualitative (participatory as well as non-participatory) methods**, to bridge some of the existing gaps in the research
Heritage should become integrated in a “trading zone” with other fields of action (e.g. social cohesion) which allow efforts made in and means available from different fields to contribute to heritage preservation and vice-versa (see Halland model C. Gustafsson, Uppsala University, Sweden).

For policy: interest from local governments, regions and cities on holistic approach towards measuring the impact of heritage + methodologies.

For policy: link training, funding and research (transition of knowledge).
Thank you for your attention!