



*THEmatic Transnational
church Route development
with the Involvement of
local Society*



5. 4. 1. POLICY RECOMMENDATION TO THE EUROPEAN UNION ON PRESERVATION AND VALORISATION OF CULTURAL HERITAGE



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1. INTRODUCTION

In the framework of Work Package 5 – *Mainstreaming and sustainability* of the project THETRIS–*THEmatic Transnational church Route development with the Involvement of local Society*, supported by the European Union and the European Regional Development Fund, a policy recommendation to the European Union (Output 5.4.1.) has been prepared.

The international project THETRIS has worked on the potentials of churches and sacral monuments in rural areas in order to foster complex development of these areas. The focus of the project is on sustainable preservation of local churches and sacral monuments (THETRIS Project Brochure 2012: 1). The project connects eleven church routes from different Central-European regions from eight countries, namely the Szatmár Region in Hungary, the Prešov Region in the Slovak Republic, the Šluknov Region and the Bohemian Switzerland Region in the Czech Republic, the Małopolska Region in Poland, the Piedmont and the Veneto Regions in Italy, the Meissen District in Germany, the Styria Region in Austria and the Goriška and the Gorenjska Regions in Slovenia.

Based on the experiences and outputs from the THETRIS project, especially on meetings and consultations with the project partners, Regional Working Group members, various stakeholders and experts, on the transnational analysis and piloted tools, and also on the Transferability training that took place in Nova Gorica on 8th May 2014, this policy recommendation suggests concrete suggestions on how a European policy can further foster development of rural areas through preservation and exploitation of cultural heritage. Church cultural heritage can have an important role in sustainable development of rural areas too, because it often has a great artistic and historic value and it is also the centre of rural communities and their cultural life.



2. POLICY RECOMMENDATION TO THE EUROPEAN UNION

Today, rural areas are facing significant social, economic, demographic, environmental and other problems, such as depopulation, lack of financial resources and innovations, a peripheral position, lack of employment opportunities and high quality services, etc. In order to foster development of rural areas, it is essential to identify specific resources of the territory. Bringing together traditions, monuments, authentic products (arts and crafts, food, wine, etc.), social networks, and nature can represent an important factor for the development of these peripheral areas. In this process, sacral cultural heritage plays an important role, because it could be the main driver of sustainable socio-economic and cultural development of many European rural areas. The following chapters present recommendations for multi-dimensional development of these areas based on precious cultural heritage.

Regarding sustainability of cultural heritage we have to take into account **different aspects of sustainability:**

- social sustainability: connected with satisfaction of basic human needs and values, and demographic sustainability;
- environmental sustainability: connected with the quantity and quality of resources of the environment, their sustainable use, and appreciation of the environment and its development potentials;
- economic sustainability: connected with the balance between costs and benefits of economic activities and the re-generation ability of cultural heritage assets; and
- cultural sustainability: connected with the need to enforce human rights (SUSTCULT Training Course 2012: 10).

It is clear that **culture plays an important role in development of initiatives and achievement of national development objectives** (Bajec 2014: 155). In 2010, the UNESCO document *The Power of Culture for Development* pointed out that »culture, in all its dimensions, is a fundamental component of sustainable development. As a sector of activity, through tangible and intangible heritage, creative industries and various forms of artistic



expressions, culture is a powerful contributor to economic development, social stability and environmental protection. As a repository of knowledge, meanings and values that permeate all aspects of our lives, culture also defines the way human beings live and interact both at local and global scales« (The Power of Culture for Development 2010: 2).

The diversity of local cultures and lifestyles is the **4th pillar** of sustainable development, beside economy, environment and society (Jacoby, Cooper 2012: 1227-1236). Culture and cultural heritage could be recognized as **the main pillar of sustainable development**. It is recommended to develop appropriate **strategies to promote collaboration among different pillars** (THETRIS Transferability training 2014).

Cultural heritage policies increasingly **consider interrelation between economy, society and culture** in a broader concept of culture. Arts and culture are the basis of **creativity** which promotes innovation, carries economic benefits and promotes development (Klamer, Mignosa, Petrova 2014: 213). »Thus, culture has an unavoidable role in reflecting past and present experiences, needs, desires and expectations of the local population on the one hand, and broader socio-political and economic flows on the other« (Bajec 2014: 156).



2. 1. CULTURAL HERITAGE AS CULTURAL CAPITAL

Cultural heritage represents the **cultural capital of the humanity**. As the well-known cultural economist David Throsby pointed it out, »capital can be defined as durable goods that give rise to a flow of services over time that may be combined with other inputs such as labour to produce further goods and services« (Throsby 2012: 47).

Economists used to distinguish different types of capital: physical (manufactured), human, natural and, only recently, also cultural capital (Throsby 2012: 47). It is important to distinguish **cultural heritage** as a specific type of capital because it **holds a set of different values**. The values of cultural heritage are economic and cultural. **Economic value** of cultural heritage can be further sub-divided into:

- use value, which derives from the use of goods, for example the use of a historical building as an office or a museum: historical buildings have also a potential sale price as real estate; and

- non-use value, which gives public goods benefits: In this framework there are existence value (value assigned to cultural heritage by people who might never use its services), opinion value (assigned by people who think that in the future they might use the services of cultural heritage) and bequest value (assigned by people who want to save cultural heritage for future generations) (Thorsby 2012: 51-58).

Cultural value of cultural heritage encompasses a lot of different dimensions of value:

- aesthetic value: the aesthetic quality of a monument;
- symbolic value: e.g. a monument can be a symbol of an event or an experience of historical or cultural importance;
- spiritual value: e.g. religious value of a work of art;
- social value: a monument or a heritage event can contribute to social stability and cohesion, etc.;
- historical value: historic importance of a monument;
- "authenticity": a building is real and unique, and



- scientific value: cultural heritage is a source for scholarly studies (Thorsby 2012: 51-58).

Characteristic of cultural heritage is that not all of the above-enumerated values can be expressed in financial terms. As a consequence, cultural heritage has to be treated as a particular capital asset. Non-market benefits of heritage assets represent an important element of economic impacts of investment projects (Thorsby 2012: 45-72).

Preservation of cultural heritage is also connected with its **valorisation**, i.e. what additional value can be ascribed to a cultural heritage site. The expression 'valorisation' can have **different meanings for different stakeholders**. Caretakers and administrators of cultural heritage sites understand valorisation as renovation, economists as exploitation and scholars of cultural heritage as realization of the potentials of cultural heritage, which is often connected with an extensive synchronic and diachronic usage of cultural heritage (Cicerchia 2012: 59-61).



2. 2. HERITAGE POLICY AND FISCAL INSTRUMENTS

Because of the problem of lack of financial resources, it is recommended to develop specific **mechanisms to stimulate inclusion of cultural heritage in the economic cycle**. New mechanisms have to be developed in order to attract sufficient financial resources and involve the private sector in preservation and valorisation of cultural heritage. In this framework financial incentives for cultural heritage sites in private ownership should be taken into account (THETRIS good practice collection. PP2 [2013]: 36; Regional SWOT analysis, Małopolska region, [2013]: [5]).

It is also important to bear in mind that heritage institutions differ in a number of ways from other kinds of economic institutions and for this reason the direct application of economic decision-making and value theory is misleading. For this reason it is important to develop new approaches (Carman 2012: 797-804).

Implementation of **cultural policy** is possible **through direct and indirect measures** performed by the government. In the first case, the government finances heritage assets which are controlled or owned by public authorities directly or it grants subsidies to private heritage sites. In the second case, indirect fiscal measures are realized through fiscal interventions (Throsby 2012: 58-62).

Regulation is the most common intervention of governments in the field of cultural heritage all around the world. It can be implemented through legislation (preservation orders, land-use zoning, etc.) and unenforceable and voluntary directives. There are certain **advantages of regulation** (e.g. rules are direct and relatively easy to establish and waive, and they protect buildings from demolition, etc.). However, **as a policy device, such regulation also has some weaknesses:**

- regulation can create inefficiency: if the regulation exceeds the social or private demand, the conservation of a heritage site is worthless;
- regulation brings administrative costs, as it has to elaborate, manage and control standards;
- regulation does not acknowledge and encourage those who take good care of cultural heritage and does not offer incentive to improve, and



- sometimes, a regulatory process can be manipulated by private interest instead of it contributing to the public good: e.g. in some areas of land-use zoning, heritage sites can be demolished to make room for lucrative activities (Thorsby 2012: 58-62).

Excessive protection and regulation debilitate vitality of cultural markets. The Anglo-Saxon liberalism has encouraged **development of the cultural market** (Benhamou 2004: 145-146). There a lot of examples of inefficient public institutions (e.g. museums) because of automatic annual financial support.

Governments in most European countries are the most important investors in culture and cultural heritage; however, it is possible to recognize **different models of cultural policies**. A model dominated by public intervention is especially characteristic of continental European countries. Another model that combines the above-mentioned orientation with a reduced public intervention is typical of the United States of America, the United Kingdom and the Nordic countries. In the last fifteen years, the first model has developed a tendency to shift in the direction of this model characteristic of the northern European states. Besides, it is possible to detect increasing importance of the private sector in the field of culture. In some countries, like Italy and the United Kingdom, the necessity to involve the private sector and introduce fiscal incentives is considered crucial (Klamer, Mignosa, Petrova 2014: 215-219).

The document *Cultural Counts. Towards new Strategies for Culture in Sustainable Development. La Culture Compte. Vers de Nouvelles Stratégies pour la Culture dans le Développement* has pointed out the importance of a more **advantageous fiscal policy for private owners, occupants and investors in cultural heritage** already in 1999 (Cultural Counts [1999]: 20). Until today, however, many European countries have failed to make enough effort and few results have been reached. Mechanisms and better solutions have to be developed to **support the public-private partnership**. This is extremely important as a lot of European countries are facing the problem of lack of public funds for maintenance, promotion and good management of cultural heritage. It is important to **involve the private sector in large-scale, long-term cultural heritage activities**, because so far, the support of the private sector has too often been limited to small-scale activities with short-term results and immediate promotion of its collaboration (Jakub Ivančo: THETRIS Transferability training 2014).

In the process of stimulating involvement of the private sector, there are two important factors that should be taken into account:



- the significance of tradition of private support that is characteristic of some countries, such as the United Kingdom and the Netherlands, and
- the important role of the state as a facilitator_(Klamer, Mignosa, Petrova 2014: 220).

A **more extensive participation of the private sector** can only be efficient in connection with more strategic planning and orientation on different levels of the public sector (Cicerchia 2012: 43).

Robust assessment methods that would integrate economic and cultural values into the appraisal of heritage investments projects have to be developed. The most important element for identification and classification of cultural heritage assets is a societal agreement, based on which **an efficient and remunerative set of policy instruments and financial (fiscal) mechanisms** can be developed and implemented to produce optimal economic returns and preserve and protect the non-market value of cultural heritage sites (Throsby 2012: 45-72; Trupiano 2005: 337-343).

Indirect fiscal means are realized through **financial mechanisms**, such as special credit lines, property tax deferment, fiscal incentives, loans, grants, waiver of development fees (Thorsby 2012: 64-72), fiscal treatments for cultural organizations or fiscal benefits on private and corporate patronage, donations and sponsorship, etc. (Trupiano 2005: 337-343).

Fiscal incentives should include donations in order to encourage development in the field of cultural heritage. This practice originates in the awareness that »the resulting increase in the resources for culture should outweigh the cost of the benefits themselves« (Trupiano 2005: 337-343). Sponsorship has always played an important role in financing culture; numerous English museums were founded thanks to private sponsorship. Nowadays, universality of sponsorship differs greatly per country; for example, while it is relatively well widespread in the United States of America, it is very scarce in France (Benhamou 2004: 140).

In some European countries (e.g. Italy), savings banks are obliged to assign a part of their income to activities connected with cultural heritage through **bank foundations** (Benhamou 2004: 140). Through these non-profit private corporations, the private sector plays an important role in preservation of cultural heritage by financing or assuring financing of activities dedicated to preservation and valorisation of cultural heritage. Since this practice does not exist in many European countries, especially in the East European countries, the



transfer and adaptation of such corporations in other European countries are recommended. In other European countries, **incentives regarding cultural heritage include donations of cultural heritage to museums** (Greece, Austria), **interventions on architectural heritage** (Italy, Belgium) **or maritime cultural heritage** (Finland), **systematic archaeological excavations** (Romania), etc. Governments stimulate private support to culture also through **matching grants, public-private partnership, lottery funding**, etc. (Klamer, Mignosa, Petrova 2014: 220).

In the processes of preservation and valorisation of cultural heritage, financial mechanisms should stimulate collaboration of not only **big companies but small and medium enterprises too**, because their involvement could prove very sustainable in terms of invigorating a local/regional identity and building a regional image of small and medium enterprises, etc. In this framework, **special workshops and trainings for local entrepreneurs, associations and inhabitants** are recommended to make them link tradition with innovation (THETRIS Transferability training 2014).

For successful and sustainable preservation and management of cultural heritage sites, a more effective **collaboration** of not only the private and public sector but also **of experts and/or local authorities and local residents** who live in the area and change and sustain cultural heritage elements is indispensable. Experts too often do not recognize the values and meanings that the local population ascribes to cultural heritage elements, which leads to a situation where these values are neglected and only experts' values and criteria are taken into account. Consequently, this results in insufficient involvement of local inhabitants in the processes of preservation, exploitation and management of cultural heritage, although they should be the main actors in these processes. The collaborative approach requires a **societal agreement** and related and tolerant societies whose members are empathetic to other people and communities, and show reciprocal trust and respect for ethnic and religious communities, etc. Moreover, an **interdisciplinary approach** of experts and scholars in cultural heritage processes is recommended (Bajec 2014: 152-155).



2. 3. CULTURAL HERITAGE AS A RESOURCE: CULTURAL TOURISM IN RURAL AREAS

In a decision-making process connected with renovation, restoration, preservation and valorisation of cultural heritage, there is another important element that has to be taken into account: **economic self-sufficiency** of cultural heritage assets. More attention should be paid to this important issue that can enable sustainability of a site.

Transmission of elements of cultural heritage from goods to resources depends on three complex factors:

- specific cultural, environmental and social identity of heritage elements that could be the basis of touristic valorisation;
- existence of a local system of direct programmatic and management sustenance;
- existence of a territorial system organized in accordance with touristic valorisation of cultural heritage (Cicerchia 2012: 29).

Scarce knowledge of the first factor and weaknesses of the second and the third one often render it impossible to carry out successful development of cultural tourism of a heritage site. For this reason, the passage from the element of cultural heritage perceived as goods to the one perceived as a resource is very complicated and requires **a complex system of territory management which includes human, technological, administrative and financial resources** (Cicerchia 2012: 29-30).

In this framework, **tourism**, more precisely cultural tourism, which **has become one of the fastest-growing sectors of the world economy** in the last years, plays an important role. Policies which are oriented to foster tourism can also encourage growth in other sectors. There is a very positive connection between tourism receipts and economic growth. An increase of one standard deviation in tourism activity (tourism specialization) means an increase of around 0.5 percentage point in annual economic growth, given that all other factors are stable. However, a solely tourism-based strategy is not enough, because in order to be inclusive and sustainable, it should be part of a strategy of economic diversification (Arezki 2012: 183-212).



The connection between cultural tourism and tourism often seems too automatic and not composed. **Tourism is a complicated phenomenon which is even more specialized in Europe. Cultural tourism still privileges the main cultural destinations, especially cultural cities**, such as Venice, Rome, Pompeii, Florence, Paris, etc., thereby causing problems regarding sustainability and overpopulation. Moreover, in some cases, especially in cultural heritage sites of international renown, cultural tourism is too often reduced to simplified comprehension, close to stereotypes. On the other hand, there are a lot of rural areas with rich and unique cultural heritage that are overlooked. The main cultural destinations could function also as **anchor sites that would divert** the flow of visitors to less overloaded rural destinations in order to balance this flow (THETRIS Review report, Graz-Seckau 2013: 7; Region SWOT analysis, Małopolska region, [2013]: [5]).

To mitigate big development **disparities between urban and rural areas**, development of cultural tourism in rural areas (**alternative destinations**) should be stimulated systematically (Cicerchia 2012: 28-29, 54). **Well-organized and managed cultural tourism in rural areas** can offer **inhabitants access to cultural events, different forms of entertainment and other services, and increase the number and level of services** that would otherwise not even exist or would not manage to subsist because of lack of demand given the small number of inhabitants (Cicerchia 2012: 80-86). Integrated and well-managed tourism should contribute necessary financial resources to assure maintenance and development of a cultural heritage site and its region, as long as it is organized and managed **in accordance with the needs of the local population and the sustainability of the site and its region**.

European policies and strategies under Horizon 2020 recognize that the new model of social and economic development should be based on enhancement of cultural and natural heritage. The European Council has pointed out the crucial role of tourism in generating growth and employment and called on all parties to implement the Agenda for European **sustainable and competitive tourism** (Pultrone 2014: 1468). Moreover, the Organisation for Economic Co-operation and Development (OECD) »has highlighted the role that it may play in the development of several world regions. This form of tourism includes experiencing local culture and traditions; participating in arts-related activities; visiting museums, monuments and heritage sites; but also focusing on landscape, nature, traditions, wine and food, handicraft products. Actually, it promotes the use of forgotten or under-explored resources enabling economic sustainability and providing funds for cultural activities. It includes not only urban areas, but also rural areas showcasing the traditions of indigenous cultural communities, their values and lifestyle« (Pultrone 2014: 1468). Cultural motives were



as a matter of fact at the origin of "tourism" already in the Middle Ages, when Christians and Muslims used to travel long distances to visit holy places (Geremia 2014: 1316; Kosi 1998: 100-114).

Well-organized and managed cultural tourism assures sustainable development of an area, directs financial resources toward preservation of cultural heritage, promotes relations between different cultures, educates or revives a community and influences the politics. On the other hand, uncontrolled management of cultural heritage can damage natural and cultural heritage, the life-style of a community, etc. (Cicerchia 2012: 65-66).

Because of the depopulation of rural areas which has been causing great economic, social, demographic, cultural and environmental problems, it is very important to consider the fact that cultural heritage could also be an important **driver of employment**. A detailed survey of the impact of cultural heritage on employment proves that cultural heritage contributes significantly to the development of direct and indirect jobs and higher employment rates (conservation and restoration activities, tourism connected with cultural heritage sites, etc.). Culture can be a driver of economic development not only in terms of employment, but also in terms of income tax (Training Course 2012: 7-9, 28-29). Well-developed and managed cultural heritage assets can contribute to solving the problem of unemployment, which is a burning issue of many European countries. Moreover, in this way it is possible **to stimulate regional and local economies and creativity, generate better rural life standards and prevent permanent migration**.

In this framework, **policies of protection and enhancement of different kinds of resources (natural, cultural and landscape) should be integrated in spatial planning with policies of tourism development and those of rural development**. Policies have to be pursued within a large-scale strategy which connects institutions from different fields and sectors, thus resulting in different viewpoints (Pultrone 2012: 1008-1012).

In the process of promotion and capitalization of the heritage of local communities and in order to support growth of these communities, it is important to design an efficient marketing plan. The needs of local communities and the expectations of cultural tourists should be taken into consideration via **responsible marketing in order to prevent the so-called "tourismification" or "disneyfication" of cultural heritage sites** (Vegheş, Dugulan, Popescu 2012: 1015-1024).



2. 4. CULTURAL HERITAGE AND EUROPEAN STRUCTURAL FUNDS

The **European Union** has supported a lot of important programs and projects in the field of preservation, maintenance and sustainable use of cultural heritage sites. The experiences and outputs within the THETRIS project have pointed it out that **European, national and regional development strategies should be more coordinated.**

Regarding projects financed by **European structural funds**, there is a problem of maintaining of the results from the projects in the period after the projects have been concluded. It is recommended to assign a certain percentage of a project's budget to the period after the "active" period of the project. In the "active" period, concrete solutions and results would be developed and reached, whereas in the following "maintenance period" (e.g. **gradual reduction in funding**), necessary activities for ensuring long-term maintenance of the results would be carried out. This would enable realization of the results achieved during the active part of the project.

Moreover, **small or micro projects or step-by-step programs**, which can support creativity and innovative ideas of small groups or individuals, are also recommended. It is important to take into account the needs and desires for regional development of local people and to be more flexible in the process of designing long-term funding programs. Furthermore, **in order to finance initiatives from European funds, it is recommended to use less bureaucratic processes and management that can be applied more easily.** This would make financial resources accessible even to people who have innovative ideas but no complex management experience. »It is important to make funding programs accessible for citizens by investing more financial resources and efforts in local/regional assistance and consulting regarding project development« (Martina Maria Linzer: THETRIS Transferability training 2014).

Another problem regarding European structural funds is the fact that **research work in the field of social sciences and humanities and its importance for the society is not appreciated and supported sufficiently.** Programs give privilege to research work in the



fields of technology and natural sciences, overlooking the contribution of social sciences and humanities, especially in terms of **basic research**, to sustainable development.

Scientific research offers greater knowledge of places, leads to greater awareness of their identity, significance and visibility, and stimulates actions for development of cultural heritage and promotion of tourism (Geremia 2014: 1315-1324).

Regarding church cultural heritage, European countries are facing **very different problems** due to the turbulent history of Europe, especially due to different socio-economic systems and experiences in the second half of the 20th century. This issue should therefore be taken into account in decision-making processes connected with European structural funds. In the second half of the 20th century, maintenance of churches in the Eastern Europe was often neglected and so the problem of reconstruction and maintenance of shrines in some Eastern European regions remains serious (THETRIS good practice collection. PP2 [2013]: 8-37). On the other hand, due to an ongoing depopulation process in many rural areas and lack of financial resources, a burning issue of **physical maintenance of shrines** is present in other European countries too. Many national governments in the European Union are currently paying less attention to culture due to budgetary restrictions. Allocation of restoration works has been reduced. Even when the most urgent restoration works need to be done, cheaper solutions of poor quality are chosen too often, because of the legislation that makes competition in the restoration market possible only in terms of costs and not in terms of quality (Concept study 2012: 12-13). Physical maintenance of shrines is the basis for further development of these cultural heritage sites and the areas where they are located.



2. 5. PRESERVATION OF TANGIBLE CULTURAL HERITAGE

Preservation of tangible cultural heritage shows close linkages with conservation of **natural heritage**. In the process of preservation and valorisation, such a connection should be considered in order to develop strategies that can stimulate preservation of cultural as well as natural heritage.

Economic value on the one side and cultural value on the other represent an important issue in connection with decision-making regarding heritage. Some heritage sites have important cultural value, but low economic value, while some others have the opposite problem. In such cases, we are faced with a question of how much economic value individuals and the society is prepared to leave off for protection of a certain level of cultural heritage. An answer can be identification of a **preference pattern for the individual or the society between economic and non-economic value** of a heritage site (Thorsby 2012: 56-58).

Preservation strategies should pay attention to **innovative mobility concepts and sustainable means of transport to enhance eco-friendly area characteristics and attractiveness of the area for locals and visitors** (THETRIS Transnational strategy 2014: 7; Regional SWOT Analysis, [Meissen district] [2013]: 14). Also, they should focus on support and **promotion of green jobs and other employment opportunities connected with cultural and natural resources** (THETRIS Regional SWOT Analysis, Susa Valley [2013]: 9).

For local and regional development today, it is recommended to use a **multidimensional approach** that includes economic, social, cultural, and ecological considerations unique to a given spatial scale and geographic context. It is important to have stakeholders who appreciate cultural heritage sites and want to provide for their preservation and upkeep. The attitude of local inhabitants towards cultural heritage, their awareness of its importance, value and also commercial potential, their entrepreneurship, agricultural, craft and other skills, financial resources, etc. have to be pointed out (Murzyn-Kupisz 2013: 156).



The issue of church preservation is of key importance because churches are the most important **local identity element, and landmarks and symbols of towns and villages**, etc. They are often located in the heart of a village or a town and have unique spatial expressions with high social and historical importance (Zeren Mine 2013: 15-18). The added value of historical buildings is based on their uniqueness, oldness, embodiment of collective memory, stratification of past events, and their art-historic, historic and other values (Fabbri 2007: 91-92).

In many regions, a topical issue is that of safety of cultural heritage sites (protection of monuments against burglary or theft). In some European countries, the legislation does not allow recordings to be produced as exhibits in legal proceedings (THETRIS RWG 2013: [2]). **Long-term solutions for safety of works of art** in churches have to be sought and adopted. Beside installation of modern security systems (fire protection, devices against burglary and theft, monitoring and extinguishing systems, etc.), it is also possible, especially in the case of very valuable works of art, to make copies of the most precious works of art and conserve the originals in a museum. In this case, another question arises, namely which institution is the most appropriate to keep the original work of art. It sometimes happens that sacral works of art from one region are kept in different museums or outside the region. A much better choice seems to be the foundation of a **museum that would collect and exhibit precious works of art of a diocese or a larger territory**. It is therefore recommended to adopt a practice of passing particularly valuable sacral works of art to a specific museum dedicated to sacral cultural heritage in order to avoid **dispersion of sacral cultural heritage of a specific territory** over a wide area. At the same time, it is recommended to display copies of very precious works of art, especially in those churches that are located in remote areas. This solution can relieve priests of having to assure safety of precious works of art in churches. Besides, it can prevent dispersion of works of art over different museums or galleries, and sometimes out of the region or diocese which churches belong to, thereby providing an integral presentation of the sacral art of a region or a diocese.

It is advised that a decision-making process regarding establishment or renewal of religious museums is governed by a standpoint that such museums should not only be »treasures houses« of the creativity of the past, but that they should also find ways to contribute to contemporary creativity (Culture Counts [1999]: 20).



Another important issue regarding sacral works of art is that of **returning of cultural properties to the country (diocese, etc.) of their origin**. This is an important question of international relations that requires more attention, negotiation and agreement.

Revitalisation of a cultural heritage site is a complex process that does not include only accessibility of a monument (reconstruction, renovation, etc.), but also an **effective and creative use of the reconstructed monument**. It is important to connect monuments of cultural heritage to the **cultural milieu of the area**. A monument of cultural heritage owes its appearance, particularities, etc. to the past centuries that influenced its essence. For this reason, if we want to appreciate the value of a monument, it is important to know and understand the history and the cultural milieu connected with the monument. **Educational programs** (trails, guide trainings, renewal of pilgrimage routes, organization of music festivals, theatre performances, exhibitions, intergenerational initiatives and other activities) are of great importance (THETRIS Review report, Turin 2013: 10-17).

To assure preservation and valorisation of old buildings that have lost their original functions, it is necessary to open them to **new uses and adapt them to today's needs**. This approach is called an **adaptive re-use**. A sustainable re-use has to maintain the value of historical buildings, raise the economic level of the local community and enrich the local culture (Yildirim 2012: 379). »Re-use means historical values will be enlivened, history will be rediscovered and the characteristics of the structure will be maintained« (Yildirim 2012: 379). Buildings can become obsolete before their physical end. Such premature obsolescence of an old building can be physical, economic, functional, technological and social (Zeren Mine 2013: 14).

In a process of deciding how to re-use a given historical building, conflicts and misunderstandings can arise between experts and the public. Architects, architectural historians, owners, contractors, governmental representatives, etc. often have different conceptions and proposals regarding re-use (Yildirim 2012: 379).

New usages of old buildings have a lot of advantages:

- social: e.g. preservation of cultural heritage value of old buildings, contribution to a renowned image and status of an organization, avoidance of degradation of an area, etc.



- environmental: e.g. re-use of structural elements and recycling; historical buildings are often constructed with materials of good quality, so it is important not to waste them.

- economic: in case extensive structural reconstruction is not necessary, rehabilitation of an old building is shorter than demolition of the old building and construction of a new one (Zeren Mine 2013: 14-15; see the good practice of the re-use of Evangelic Church in Rumburk (Czech Republic), which is a centre of cultural and social life of the local community (THETRIS Good practice collection. PP2 [2013]: 43-44)).

There are two elements that play an important role in preservation of material cultural heritage: state of repair of the monuments and degree of appreciation of the monuments (Murzyn-Kupisz 2013: 156).



2. 6. PRESERVATION OF INTANGIBLE CULTURAL HERITAGE

The notion of intangible heritage and policies connected with it are unequal among countries. The western countries have only recently become interested in this concept. Some countries (e.g. Italy and Belgium) have become aware of its importance in connection with preservation of local identities (Klamer, Mignosa, Petrova 2014: 216).

The new **UNESCO conventions** point out that cultural heritage refers not only to material remnants, but also to intangible elements; there are many elements of intangible heritage connected with churches, e. g. customs, poems, dialects, music, legends, traditional skills, and knowledge. In this framework, important steps have been taken towards understanding of the role of local communities, groups and in some cases individuals who live with heritage elements and potentially change them. Moreover, an important achievement was acceptance of **new roles of heritage to improve daily life**. Tangible and intangible past elements are important **symbols of personal or collective identification and evidence of social and economic improvement**. They should be incorporated into processes to advance sustainable development (Bajec 2014: 152-155).

Close linkages between tangible and intangible elements of church cultural heritage should be valorised. Such linkages are essential in trainings of local population, entrepreneurs, tourist boards, etc. Moreover, they can enrich cultural and experience tourism of an area with benefits for locals and visitors.

In the process of valorisation of cultural heritage, **greater respect and consideration should be paid to intangible heritage**: folklore, music, traditional skills and handicrafts, etc. Several good practices demonstrate that intangible heritage can become a driver of sustainable social and economic development of communities. It is important to sustain **initiatives for revitalization of handicraft sector, traditional skills and know-how** (Makuc 2013: 19-20; THETRIS Regional SWOT analysis, Małopolska region, [2013]: [10]).



One important issue regarding cultural heritage products is promotion of specific **certification systems** (THETRIS Review report, Kranj 2013: 13). This practice should encourage the highest quality level of services and products, prevent unfair business practices and competition, and motivate local producers to develop business ideas. Special attention should be paid to natural and environmentally-friendly techniques.

Globalization has impact on the **handicraft sector** in several ways and brings opportunities as well as threats for local handicraft producers. Import of mass-produced "handicraft substitutes" might lead to a potential loss of cultural heritage at some markets; however, globalization could also enable some handicrafts producers to sell their products at the global market. In this framework, it is important to underline the role of policy **to preserve and promote export of high-quality domestic handicraft products and successfully cope with mass-produced handicraft substitutes from developing countries**. It is therefore highly recommended to establish **well-managed handicraft trade associations, training programs**, effective **assistance for handicraft producers** in the area of export, promotion and quality control, and **better and more strategic use of protection and special provisions provided in World Trade Organization (WTO) agreements** (Grobar 2014: 453-462).



2. 7. CULTURAL HERITAGE CONNECTED WITH EVERY-DAY LIFE OF COMMUNITIES AND SUSTAINABLE PRINCIPLES

With the exception of few good practices, a **linkage between quality of life and sustainability of cultural heritage sites** is still neglected. If we take this important issue into account, it is possible to organize the use of a cultural heritage site in such a form that is connected with the everyday life of a place or a region. The value of cultural heritage is **multi-dimensional** and depends on the variations in the process of social construction and selection. In normal circumstances, the **value of cultural heritage is seen as positive**; however, sometimes, it can be perceived **in a negative way**, often in connection with ethnic, religious or political conflicts. In the European Union, which includes different nations and ethnic and religious communities, **religious tolerance** and respect is essential (Cicerchia 2012: 30).

It is important to take into account the goals of **different groups that take care of successful preservation and valorisation of cultural heritage**. A network of stakeholders is diverse and consists of different actors involved in the management of the available resources of cultural heritage. Some groups of stakeholders are more influential than others, for example regional authorities and their subordinate public cultural institutions, creators and artists who perform traditions and cultural customs in an active way. Although regional authorities do not always appreciate them enough, local inhabitants are the main stakeholders and as such very important because the existing resources of cultural heritage are incorporated in the functioning of their communities. Other important stakeholders are entrepreneurs, representatives of cultural industries and local non-governmental organisations. It is important not to forget schools and other educational institutions as well as visitors and tourists. In order to achieve successful and effective management of cultural heritage in the framework of stimulating socio-economic development, interaction and collaboration among these groups that are interdependent is very important (Góral 2014: 46-48).

These groups develop their strategies and strive to use their electoral or economic power to reach their goals. Their objectives could be very different, which might be the reason why



they are often in conflict (Piccinato 2005: 45-46). For efficient preservation of cultural heritage, a **social dialog and achievement of at least a minimum agreement among all the involved stakeholders** is of key importance (Grefe 2007: 45-47), which is why improved systems of governance among local stakeholders, tourist operators, etc. are suggested (THETRIS Regional SWOT Analysis, Susa Valley [2013]: 9).

Development planning requires certain **knowledge of the social and historical reality** of a community with a special attention on social and/or individual values and meanings of elements labelled as heritage. Cultural heritage represents natural and cultural resources from the past and embodies contemporary values. The attitude of local inhabitants towards heritage elements depends on various circumstances, experiences, and the social and economic situation. Decision-makers, such as political authorities, experts, economists, etc. should take these circumstances into account. To reach an integrated strategy for sustainable development, a research should be carried out on the way of life, past and present practices, experiences, meanings and values of a heritage community. Cultural heritage could play an important role in the development of a community only if the local community which changes and uses heritage elements is involved (Bajec 2014: 155-157).

Application of sustainable principles in development programs means that heritage policies are integrated according to the needs of the community, community education and regeneration strategies of an area, well-organized and managed cultural tourism, cultural industry and regional planning that enhances sustainability of natural and built environment (Thorsby 2012: 45-52).

Heritage activities could mitigate a lot of social problems, like poverty, gender/social inequity, intergenerational conflicts, etc., empower people, generate ideas for innovations, and foster creativity, new social innovation, cohesiveness and reciprocity of the population (Bajec 2014: 158-161). Societal activities and cultural heritage practices, for example, study and research work of local history, old skills and knowledge, organization of different local events (religious or cultural festivals, theatre performances with amateur actors in dialects, workshops on learning old skills, village celebrations, revival of historical events or old skills, concerts, etc.), restoration of local architectural objects, re-use of old skills and knowledge for creating new products, etc., could build the foundation for **networks for fostering interaction and cooperation among different stakeholders**. These activities and practices are important in order to establish and maintain social cohesiveness and intergenerational connections, enable opportunities for informal connections and interactions, and stimulate



life-long learning and creativity, opportunities for different kinds of training, etc. They also represent a means for introducing sustainable development in local communities. Networks could bring together different stakeholders and different types of capital and stimulate innovation and sustainable development of local communities. It is necessary to raise awareness of importance of cultural heritage and importance of **networking and collaboration of decision-makers, local inhabitants and other stakeholders in the process of preservation and valorisation of cultural heritage** (Bajec 2014: 153-162; Regional SWOT Analysis, [Meissen district] [2013]: 14).

Collaboration of many stakeholders, however, requires a **mediator**. This important role should be taken up by either **regional development agencies or cultural or research institutions and universities**. The role of these experts and/or researchers is not only to research and evaluate different practices, but also to help local residents to achieve better living conditions (Bajec 2014: 159-160). Universities, for example, can play an important role in supporting the living heritage of places by acting as anchor institutions in making communities more sustainable (Green, Lloyd, Parham 2012: 245-252). Furthermore, development of rural areas should also be stimulated through well-managed **umbrella organizations** (see the pilot action regarding management trainings organized by the Association of Communes and Cities of Małopolska region (THETRIS Transnational tool [2014]: 64-68)).

As far as networking is concerned, it is important to stress the importance of **cross-border and international collaboration**, so that it would be possible to cross state borders and develop a direct contact between people living along the borders (THETRIS Good practices collection 2013: 4-10). Moreover, establishment of an European consortium for promotion and valorisation of European church cultural heritage is recommended (THETRIS Catalogue of project ideas 2014: 40-41; THETRIS Project idea market 2014).



2. 8. CULTURAL HERITAGE AS A GENERATOR FOR SOCIAL INCLUSION AND INTEGRATION

It is clear that integration which is an important European social issue is not only an economic problem, but it is also connected with **perception of places and persons and cultural integration**. Cultural heritage could contribute to mitigation of this problem, facilitate integration of communities into social life, and enable exploitation and integration of values in a future perspective (Grefe 2007: 39-41). Experiences studied within the THETRIS project demonstrate that church cultural heritage also facilitates integration of immigrants into local communities (THETRIS Good practice collection 2013: 59).

Cultural heritage plays an important role in building **community cohesion, social justice and active citizenship**. Cultural activities »have become ever more powerful vectors of identity and communication« (Culture Counts [1999]: 8). Special attention should be paid to **groups who are under-represented in the heritage sector, such as children and young people, the elderly, immigrants, minority ethnic groups and those with special needs**, and involve all these groups in processes of preservation and valorisation of cultural heritage.

People with special needs could be involved in **social projects that are trying to minimize exclusion of people with social disadvantages or difficulties by involving them in preservation and valorisation of cultural heritage sites through trainings and non-profit employment initiatives** (e.g. cultivation of a historically valuable area) (THETRIS Good practice collection 2013: 42-44).

Special programs should be organized for children and youth (e.g. revival of old customs, skills and handicraft, workshops, summer schools). Programs should raise awareness of importance, richness and diversity of European cultural heritage among the young and build a basis for active participation of the youth in the processes of preservation and valorisation of cultural heritage. It is important to raise awareness among children and young people of the importance of cultural heritage, its value, preservation and development potential.



Another important group to consider is the immigrants. Cultural heritage, even church cultural heritage with its art-historic, historic and other values, should be an important mediator for efficient social inclusion of immigrants in the European community (e.g. successful integration of immigrants through their inclusion in the processes of preservation and valorisation of church cultural heritage: THETRIS Good practice collection 2013: 59).

In terms of social inclusion, it is important to point out the role of cultural heritage in creating new qualifications and skills, and also in a **correctional system**, especially in crime prevention activities (SUSTCULT Concept study 2012: 35-37).

In processes of preservation and valorisation of cultural heritage, more precisely in promotion and dissemination activities among groups that are under-represented in the heritage sector, **information and communications technology (ICT)** should play a greater role. ICT should be more oriented to target groups, because through these tools, mediators could reach the above-mentioned groups directly and facilitate their inclusion in the processes of preservation and valorisation of cultural heritage. The pilot action developed by Diocese Graz Seckau in the framework of the THETRIS project proves how it is possible to involve young people in the process of valorisation of cultural heritage in a more active way by making them use ICT solutions (for example, the Augmented Reality in smartphone apps) that join innovation, cultural heritage and interesting communication tools (THETRIS Transnational tool [2014]: 16-19; THETRIS Pilot seminar Judenburg 2014). Moreover, advanced ICT, combined with the development of applications based on Artificial Intelligence (diagnostic monitoring, integrated knowledge, aimed at acquiring and sharing information and data, by means of artificial intelligence, enriching, integrating the visit of sites and monuments by using 3D reconstructions and applications of Augmented Reality, geo-catching games, etc.) opens new possibilities to investigate cultural heritage in depth (Migliori et al. 2012: 111).



3. CONCLUSIONS

Based on the THETRIS experiences and outputs, this policy recommendation to the European Union gives concrete suggestions on how European policy can foster development of rural areas that are facing significant social, economic, demographic, environmental and other problems, through preservation and exploitation of cultural heritage.

For this reason, it is of key importance to identify specific resources of rural areas. The linkage of traditions, monuments, authentic products, social networks and nature can represent an important factor for the development of European peripheral areas where cultural heritage can be a driver of sustainable socio-economic and cultural development. Recommended are implementation of appropriate strategies for promotion of collaboration among different pillars of sustainable development (culture, economy, environment, society) as well as more efficient collaboration among experts, politicians, investors, local inhabitants and other stakeholders. Heritage activities are important as they can mitigate different social problems and foster creativity and innovation. Furthermore, they can involve groups which are under-represented in the heritage sector (children, the elderly, immigrants, persons with special needs etc.) in preservation and valorisation of cultural heritage, thereby minimizing their exclusion from the society. Greater attention should be paid to intangible heritage and preservation and promotion of export of high-quality local products (e.g. through certification system).

In order to stimulate development of rural areas (especially to reach a higher employment rate, increase the level of services, stimulate regional and local economies, generate better rural living standards and prevent permanent migration) and balance the touristic flow in the European Union, there should be more support for development of sustainable cultural tourism in rural areas. Cultural tourism privileges some cultural cities, thereby causing problems regarding sustainability, overpopulation and too often also simplified comprehension of these places. On the other hand, there are a lot of rural areas with rich and unique cultural heritage that are overlooked. The main cultural destinations should function as anchor sites to lead the flow of visitors to less overloaded rural cultural destinations.



In terms of European structural funds, it is recommended that a certain percentage of a project's budget is assigned to the period after the "active" period of the project (e.g. gradual reduction in funding) to ensure long-term maintenance of the project's results. In order to make financial resources accessible to people with innovative ideas but no experience of complex management, it is recommended to establish small or micro projects or step-by-step programs and more easily applicable processes and management for financing initiatives from European funds. Also significance of supporting physical maintenance of cultural heritage sites has to be pointed out. Nowadays, basic research work in the field of social sciences and humanities is not appreciated and supported enough, which causes great problems in the processes of valorisation of cultural heritage, because of lack of appropriate and reliable information and content.

Due to lack of financial resources, specific mechanisms have to be developed to stimulate inclusion of cultural heritage in the economic cycle, involve the private sector in preservation and valorisation of cultural heritage (with special attention to involvement in extensive, long-term activities) and attract sufficient financial resources. Better solutions for the public-private partnership support and integration of economic and cultural values of cultural heritage have to be found.

Based on a societal agreement, an efficient set of policy instruments and fiscal mechanisms should be developed and implemented (e.g. special credit lines, property tax deferment, fiscal incentives, fiscal benefits on private and corporate patronage, donations and sponsorship etc.). Moreover, it is recommended to adapt and implement certain good practices that have been proven successful in some European countries, like bank foundations, more efficient and extensive fiscal incentives for donations and patronage or incentives on architectural heritage.



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5. 4. 1 POLICY RECOMMENDATION TO THE EUROPEAN UNION ON PRESERVATION AND VALORISATION OF CULTURAL HERITAGE

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