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BhENEFIT

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Date of training activity:

Locality of training:

Trainer:.....

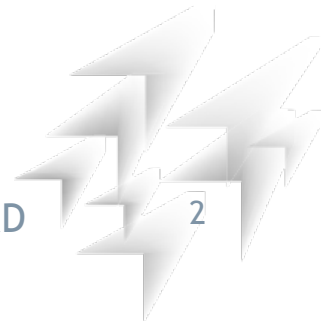


WP T3.2.2 E-learning tool

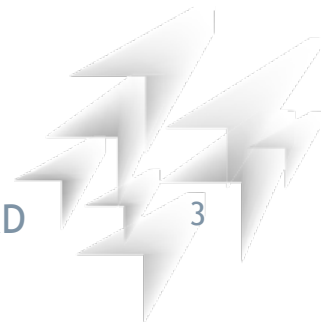


Author: BhENEFIT Consortium

- to develop awareness about the HBA management strategy
- to develop awareness concerning the potential of the HBA strategy in planning and management of HBA sustainable development
- to develop the knowledge about common international institutional frameworks of the HBA management
- to mediate the best practice examples



- project introduction
- getting to know the theme
- discussion and summarisation
- planning game 1 - brainstorming
- outputs from the game
- planning game 2 - stakeholders' decision making
- conclusions and interpretations of the outputs



PROJECT INTRODUCTION - HBA GOVERNANCE SYSTEM ANALYSIS:



The main COMMON GOVERNING PRINCIPLES

1. **CULTURAL HERITAGE IS OUR IDENTITY**
2. **CULTURAL HERITAGE IS PRESERVED BY CENTRALIZED PRESCRIPTIVE POLICIES**
3. **CULTURAL BUILT HERITAGE IS MANAGED BY AN “INTEGRATED APPROACH”**
4. **HERITAGE IS A LEVERAGE FOR LOCAL DEVELOPMENT**
5. **BUILT HERITAGE AND LANDSCAPE ARE COMPLEMENTARY ASSETS**



A HBA is a Historic built environment, both limited to a **portion of an urban area** or extended to a not-natural, **designed landscape** (shaped by complex human forces acting on the natural environment), which is made up of innumerable unique and interlinked human built elements (buildings, infrastructures, streets, canals, factories etc.) which tell the particular story and identity of the place.

A HBA is the result of a centuries-long process of evolution, a process dictated in part by changes in natural conditions but much more immediately and obviously by human effort, adding, adapting and replacing and it is, therefore, a **powerful expression of culture and history**, it shows how society has evolved, and its present form provides a focus around which communities define their identity.

In a HBA the morphology of the settlement, the designed structure of the place, **the relationships** between the different components are **more important and significant than the individual monuments**, because they are often visually more appealing and intellectually more satisfying because they allow us to realize the relationships between past activities or the structures of past societies.



It is necessary to clarify several key terms for a better understanding of principles, actions and key words related to the protection of HBA with the main objective to implement strategies for a more sustainable governance and to develop a shared strategy for an integrated HBA.

HBA - historic built environment, both limited to a portion of an urban area or extended to a not-natural, designed landscape (shaped by complex human forces acting on the natural environment), which is made up of innumerable unique and interlinked human-built elements (buildings, infrastructures, streets, canals, factories etc.) which tell the particular story and identity of the place.

Although every country involved in BhENEFIT shares the definition of HBA, not one national normative report this peculiar matter that can be considered an intersection between urban planning and the protection of cultural heritage. The various national laws are about similar concepts, however.

Strategy - can be considered a plan of action designed to achieve a long-term or overall aim. For the BhENEFIT project, the term strategy represents one of the main outputs of the project (to produce a shared Strategy for the sustainable management of HBA), focused on governance issues that collects suggestions and advices developed by the partners to improve a more efficient and sustainable governance of HBAs.



Governance and management - the boundary between governance and management of HBA is subtle but clear. In summary, we can say that governance concerned the decisional process, management the executive one. Governance sets general objectives; management specific goals and feasibility. Governance is a more general reflection that includes several aspects concerning the complexity of an integrated approach; management concerns guidelines and how we can do something.

Sustainable management of HBAs - sustainable development and, consequently, sustainable management is a **global objective**, the fulfilment of which requires a **long-term strategy dovetailing policies for economically, socially and ecologically sustainable development of HBAs**.

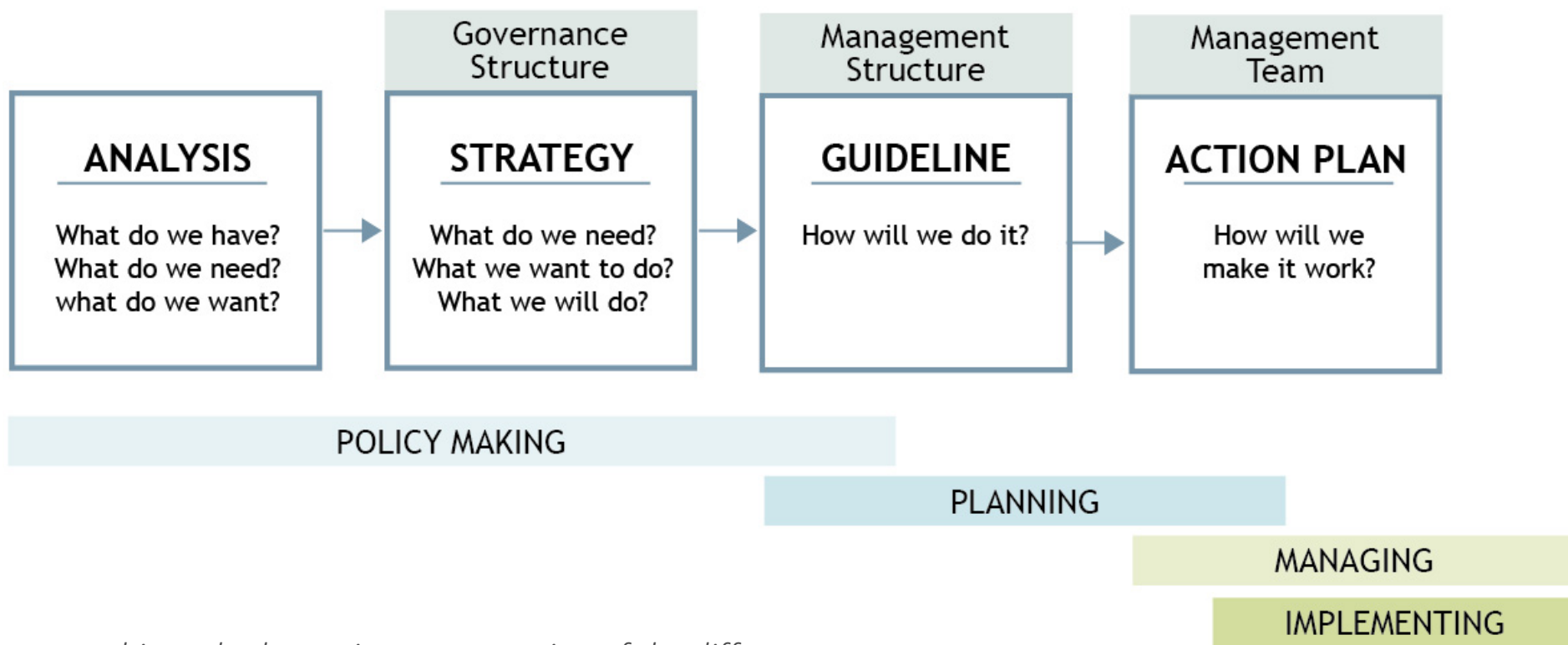
Sustainable management represents specific quality of the management, one of leading functions of which is the safeguarding the sustainability of the managed objects (processes, physical objects, communities etc). This function is an integrating function across other management functions, e.g. coordination, optimisation of the processes, minimisation of the resource consumption, maximising the benefit, or others.



Decision making - is continuous and indispensable component of managing any organization or business activities as well activities for the protection and valorisation of HBAs. Sustainable conservation, reuse and management is not feasible without a systematic data collection and registration that identifies history, architectural attributes, preservation state and the possible alterations during the entire lifetime. It constitutes a solid basis for any knowledge-based decision-making process to establish priorities of HBA protection

To achieve a **shared strategy for the sustainable governance and management of CE HBAs** a path has been developed consisting of analyses, meetings, visits and targeted workshops and trainings. With a generic definition, strategy can be considered a plan of action designed to achieve a long-term or overall aim. HBA administrations and stakeholders need to continually improve and build knowledge and skills to enable them to develop and implement sustainable HBA integrated strategies to respond to the manifold challenges they are facing.

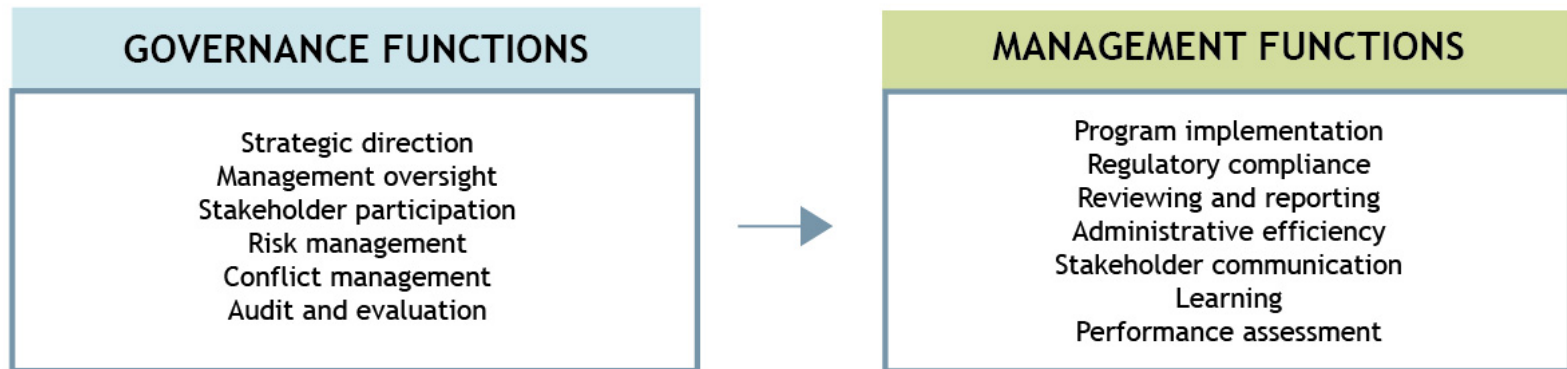


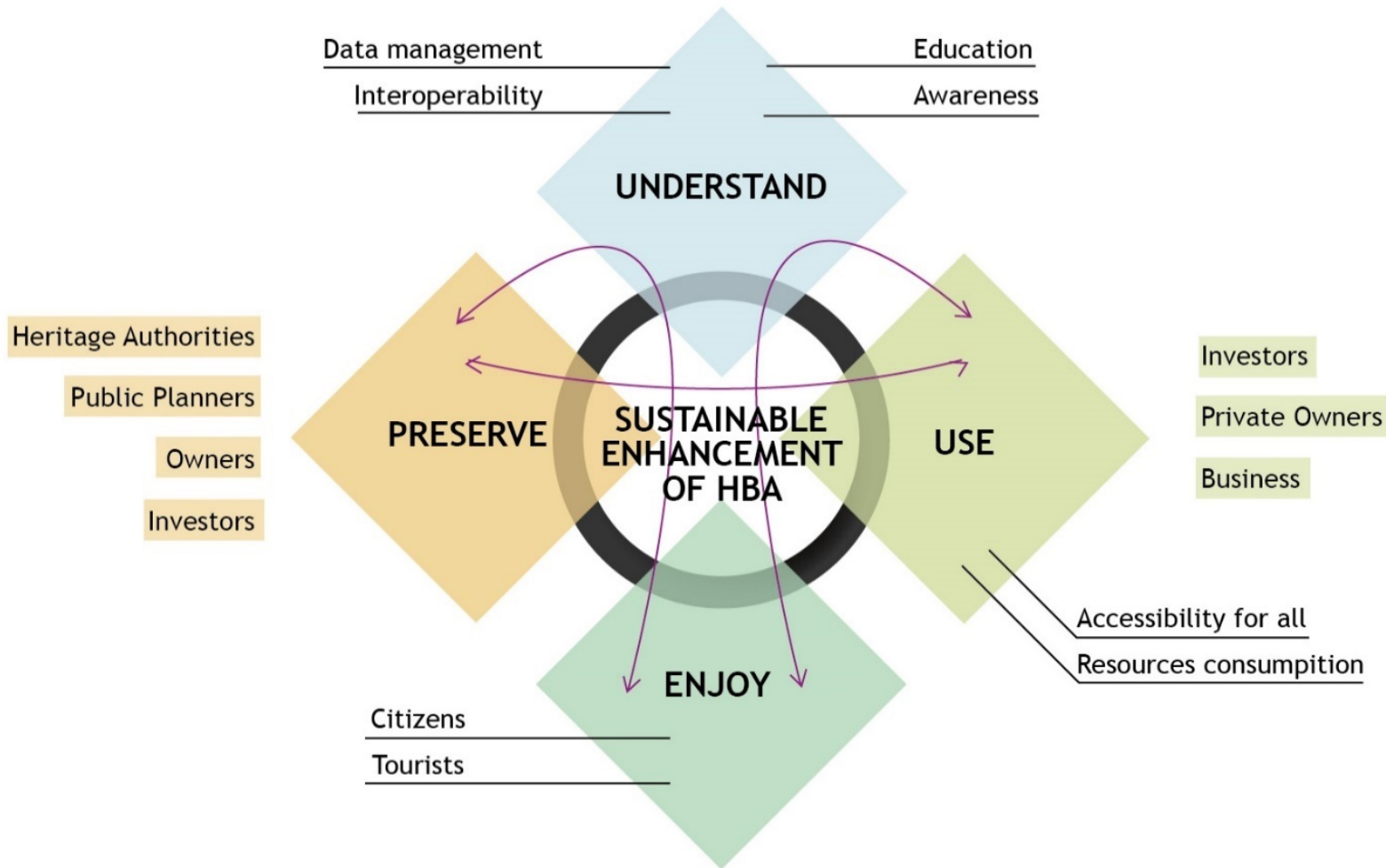


graphic and schematic representation of the different steps of strategy and management processes



To understand the complexity of the governance and management of an HBA, the first step is to adopt the above mentioned HBA definition. When we realize that the HBAs influence different aspects of society and life, it should be obvious that spending the time to build an effective knowledge is the right direction. A **strategy for the enhancement of HBAs** must start from education and awareness, from information (i.e. tourism), data management and interoperability. **Decisions regarding the governance and management of HBA**, programming and resource allocation are all based on an **effective territorial understanding** that helps to describe the overall context of the HBA.





The diagram above is a graphic representation of the management complexity of HBA



TRAINING A - ENGINEERING AND ARCHITECTURAL FEATURES AND NEEDS FOR HBA MANAGEMENT

Planning game 1. - Brainstorming and silent decision making

(the planning game has to be well prepared in advance)

Step 1: dividing auditorium into the groups and explain their tasks individually

Step 2: group 1. listing of key factors for the HBA management (i.e. environmental, social, economic) - putting them on the coloured cards (10 min)

What are the main factors of HBA management?

Step 2: group 2. listing of how the HBA affects the city (i.e. the city center, as a tourist destination, city brand, place for living) - putting them on the cards (10 min) -

What is the effect of HBA on the city?

Step 3: both groups - in silent decision making, going around the table with the cards the groups mutually define the preferences among the factors and complete the lists writing down additional factors (10 min)



TRAINING A - ENGINEERING AND ARCHITECTURAL FEATURES AND NEEDS FOR HBA MANAGEMENT

Planning game 1. - Brainstorming - conclusions and interpretation of the outputs from the planning game 1 - interdependences between the factors of HBA management and the effect of HBA on the city

What are the main factors of HBA management?

What is the effect of HBA on the city?

Presentation of the comparison between the outputs from the groups showing the overlaps and parallels.

*The confrontation of the demand represented by the needs (management) and offer represented by the contemporary state of HBA and its ability to satisfy the needs = **HBA value***



The relationship **between HBA conservation and a sustainable management** can be understood in two ways (what is probably required is a combination of the two approaches):

1. As a concern for sustaining the HBA considered as a result in itself, and part of the environmental/ cultural resources that should be protected and transmitted to future generations to guarantee their development (intrinsic).
2. As the possible contribution that HBA and HBA conservation can make to the environmental, social and economic dimensions of sustainable development (instrumental).

The necessity to improve and manage the buildings' sustainability of HBA is a central European question. How can HBA be used and managed efficiently? How can the management of HBA be able to tap the ecological and social innovation potential to ensure conservation and valorisation? **The hope is to ensure that the HBA be protected, in a dynamic fashion, through an efficient, comprehensive and sustainable management system, strengthened by the effective coordination amongst the different stakeholders involved.**



A **participatory approach to management** is being promoted in various fields but particularly in the HBAs sector, given the perception of heritage as the shared property of communities and a factor in ensuring the sustainability of those communities. Achieving more efficient participation is one of the main goals of HBAs' representatives that should be:

- managed by **local people** more in mind,
- managed to **meet the needs** of local people,
- drew on **local knowledge**.

Information from the CE Countries shows that, in practice, HBAs management systems are often failing to involve local counterparts. Even when community involvement does take place, the level of participation in decision-making and the capacity of local stakeholders actually to engage and make contributions are often limited.

An effective participatory approach that delivers reciprocal benefits to the cultural property and to society depends on understanding:

- **who participates** in decision-making, assessment, planning, implementation and evaluation processes, and how;
- **who contributes** with experience, knowledge and skills, and how;
- **who benefits** economically, socio-culturally and psychologically, and how.



Stakeholder involvement must be **goal-oriented** and refers to participation of interest groups (i.e. representatives of locally affected communities, owners, professionals, national or local government authorities, politicians, civil society organizations and businesses, citizens) in the planning or decision-making process of HBAs. Stakeholders can be defined as any group or individual who can affect or is affected by the management of HBAs. In general terms, four main stakeholder groups can be distinguished:

- stakeholders who directly benefit (beneficiaries),
- stakeholders who are negatively affected (burden),
- stakeholders who directly impact on HBAs' ecosystem (services) (e.g. land owner, resource manager);
- stakeholders who indirectly influence on HBAs' ecosystem (services) (e.g. decision maker, civil society organisation).

In HBAs we can divide the stakeholders in two main categories:

1. **stakeholders by law:** the institutional stakeholders that needs to be involved at the beginning of the decision-making process - essential elements (i. e. public bodies, municipalities, governmental institutions but also private owners, developers);
2. **additional stakeholders:** important to be involved in the decision-making process at different times and with different modalities (very broad category presenting very different characteristics - i.e. NGOs', specialized sectoral agencies)



To delineate the sharing and optimization of resources, we started with identifying the main groups of actors involved, subdividing them into three macro-categories, and then trying to understand, for each one, what roles and resources could be put in common.

Public sector

.. is represented by local, regional and state authorities, public institutions (such as schools, research institutions, etc.), communities, NGOs.

The main competences are identification and protection of the public values, governance of social processes, urban development and decision-making.

Semi-public sector

.. is represented by universities, associations, clusters, public-private networks, religious institutions.

Their main competences are knowledge collection and development, value identification, argumentation and mediation among stakeholders and the public sector.

Private sector

..is represented by enterprises, banks and financial institutions, private institutions (research, consultancy, etc.)

The main competences are decision making, making sustainable businesses, using money and other resources for achieving specific benefits, attracting the investors, marketing.



Each sector has peculiar and crucial characteristics within the HBAs' governance and management. It is inevitable the creation of a gap between sectorial skills and roles; this gap can only be filled by mutual comparison and collaboration. Hence the specific skills and competences of the public, semi-public and private sectors have been clearly recognized and analysed, we have identified some horizontal or transversal competences, for which execution a shared dialogue and ongoing collaboration between the involved sectors is necessary.

These competences belong to different and more complex fields including:

- environment: energy efficiency, urban heat island phenomenon, waste and water, pollution, mobility;
- society: services and facilities, cultural life and leisure facilities, identity perception, gentrification vs. mixite, accessibility, security;
- economy: tourism impact, maintenance costs, transformation costs.



In HBAs, also the trade-off principles should be used to **find the balance between conservation of the historical buildings, their use, the economic profit and the maintenance of a high level of quality** in the historical city centres. The results need to find the best technical solution adjusted to the conservation prescriptions of each CE Country.

This schematic process **highlights the necessity to have a shared vision between the local administration** (in the role of mediator) and the different groups of stakeholders, otherwise these strategic city players cannot be in the condition to contribute and implement the HBA's sustainable enhancement strategy. In the result, the **maintenance of the use and the activities** cannot only depend on the public administration but must be a common (and principal) responsibility **also of private owners and investors involved** in the decision-making process.



TRADE-OFF MECHANISM PRINCIPLE



Together with clear conservation and planning prescriptions, we should also have **management plans able to make the historical building lively and to plan a long-term use over time**. The maintenance of the **use and the activities** cannot only depend on the public administration but must be a common (and principal) responsibility also of private owners and investors involved in the decision-making process



The shift in the HBAs sector from simple physical protection through a more layered approach to the management that takes into account social, economic and environmental challenges. This provides a basis for giving the HBAs a function in the life of the community. HBAs are very often subjects of contention among multiple stakeholders, mainly in the face of rapid socio-cultural changes. This more holistic approach has made the management of HBAs all the more demanding.

The challenges of managing an HBA starting from a common framework representing the basis within the very wide range of possible governance and management systems. The challenges are defined with the problem posed and from the objectives to be achieved then end with **strategic actions proposal** useful for drawing up the local guidelines. See the action plan below:

Legislation

- Facilitation of the development of complementary instruments and regulations for HBAs
- Integration across cultural Heritage's legislation and urban planning

Urban and Strategic Planning

- Planning of recurring working and updating meetings
- Involvement of different professionals in the design phase
- Planning the economic sustainability in the long term

Citizens

- Building the perception of the city as a Commons
 - Organization of targeted and public meetings
 - Openness to proposal for collaboration (e.g. pact of collaboration with citizens)
- Introduction of a participated budget



Private sector for-profit

- Involvement through meetings and workshops
- Involvement in the monitoring phase
- Creation and definition of call for ideas

Specialised Technical Bodies

- Integration across information and resources:
- Best use of all information sources
- Across disciplines and sectors
- Identify major issues
- Documentation quality
- Involvement of professional associations (architects, engineers, lawyers ...)

Internal Collaboration

- Definition of more simple procedures with more rapid times
- Coordination of a sharing participation in decision-making, assessment, planning, implementation and evaluation processes

Sustainable Technology

- Evaluation of the building's value
- Drafting of a check list for the choice of the most suitable type of intervention
- Definition of common evaluation parameters such as:

Sustainable Tourism

- Medium and long-term planning involving different stakeholders, in particular: local businesses, associations, cultural institutions and citizens)
- Educating travellers to responsible tourism also through experiential situations



Planning game 2. - Multi-actors' decision making and their integration in HBA management - interactive exercise

(defining of the stakeholders involved in HBA including their main interests and engagement in HBA management - verifying different modes of actors' behaviour and possible balancing of the interests across the whole scale of stakeholders)

Step 1: brainstorming and discussion: identification of the stakeholders in the development of urban green areas and their different activities in urban green

Step 2: distribution of the roles in the auditorium with prepared description the stakeholders have to play in the game; each role is characterised with formulated positions and demands

Step 3: comparing the power and position of the stakeholders in planning and decision making



Planning game 2. - Multi-actors' decision making and their integration in HBA management - conclusions and interpretation of the outputs from the planning game 2

- after the game the outputs are compared - followed with interpretation and stressing the roles of the planners
- although the descriptions of the roles are identical as well as the composition of the players, the results from interactive decision making can be different from group to group as the personalities and personal abilities to argue are different
- **new understanding of planning and role of stakeholders in HBA management reflecting their specifics**
- HBA management is experiencing the movement from traditional model of hierarchical territorial government, across different levels of territorial units (local, regional), to the system of governance where the power is shared and split among a variety of stakeholders creating overlapping vertical and horizontal co-operation patterns between governmental and non-governmental public and private structures



Planning game 2. - Multi-actors' decision making and their integration in HBA management

New roles of actors?

1. mediator and process catalyst
2. coordinator
3. one of stakeholders - shift from government to governance approaches
4. integrator - shift to integrative approaches



GUIDELINES FOR THE IMPLEMENTATION OF THE STRATEGY: CZECH REPUBLIC



VISION

Mikulov is a cultural and tourist center of international importance.

...AND MISSION



Location





St. Vaclav Church
and Tower

Mikulov
Chateau

Chateau
Garden

Upper
Synagogue

Jewish
Quarte

Goat Tower

Historical
Square

Dietrichstein
Tomb

MPR MIKULOV ID

- first written record: 1183
- number of inhabitants: 7 371
- MPR Mikulov area of interest: 19,95 ha
- heritage reservation since: 1982 (historical core since 1952)
- number of objects in MPR Mikulov: 258
- number of cultural monuments in MPR Mikulov: 146
- number of cultural monuments out of MPR Mikulov: 36
- total costs spent on regeneration process: € 14.8 mil.
 - 1995 - 2004: € 6.1 mil.
 - 2005 - 2014: € 3.9 mil.
 - 2015 - 2024: € 4.8 mil. (estimated)



Why we chose it?

- More than 800 year history of the city
- Urban conservation area since 1982
- Unique historical monuments concentrated in the area and rationally set in the landscape under the far-sighted management
- Long term experience in conservation process, the first regeneration conception was launched in 1983
- High quality of planning and architecture in the buffer zone out of a heritage-protected area
- Link to the tourist areas of the Pálava Protected Landscape Area and the Lednice-Valtice Landscape Complex

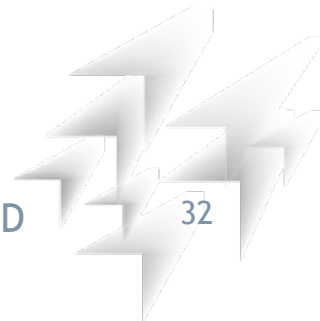


Relevance to BhENEFIT

- Contemporary pro-active approach of the City in MPR rehabilitation process - management is designed in a multisectoral and participative way -> updated regeneration strategy 09/2017
- Various coop. stakeholders - public involvement during the regeneration process (e.g. Spolek přátel Mikulova Society)
- Financial support through public and private funding processes
- Results and impacts are documented and analysed
- Long term sustainability of the case study
- Follow-up projects in MPR, in protection zone and in adjacent UNESCO heritage areas
- Transferability of the case-study



Methodological model for an integrated monitoring plan including GIS and BIM systems



Data processing and analyzing

Data processing is, generally, the collection and manipulation of items of data to produce meaningful information (French, 1996).

Data processing functions: validation, classification, sorting, transformation, etc.





Using of ICT tools - the ability to link spatial (geometrical) and non-spatial (descriptive) data of physical features

The aim is to review and to evaluate monitored data in the context.



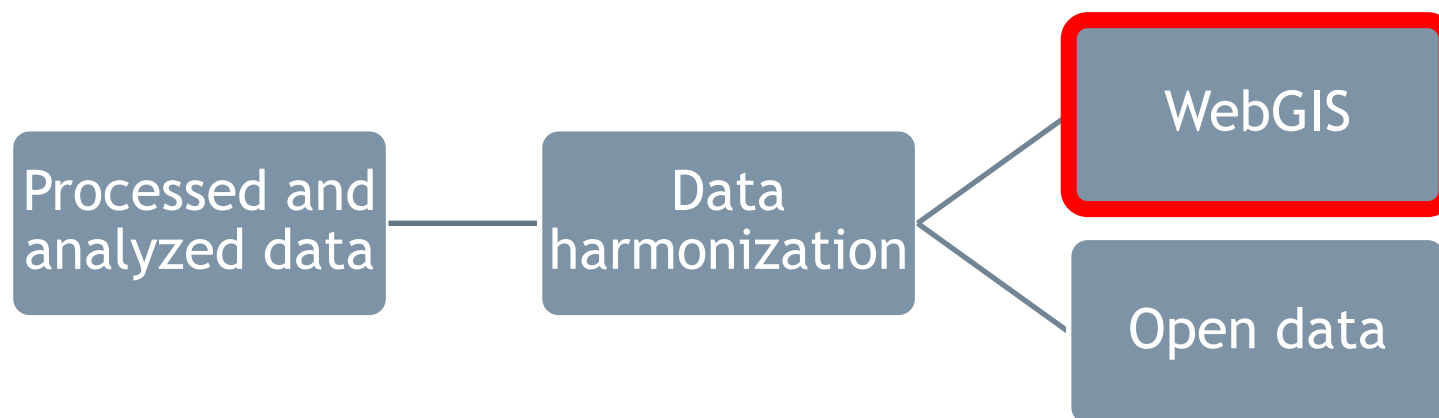
Relevant mapping tools for monitoring

Monitoring methods should be applied at a specific scale. The scale selection depends on the extent of selected area and on the ability to get needed data. This choice will affect a degree of details.

Tool	Monitored area	Small scale	Medium scale	Large scale	Detailed scale (built structures)
GIS	wider area of interest				
	main monitored area				
BIM	wider area of interest				
	main monitored area				



The aim of data sharing is to provide comprehensive information that is easily accessible and simplifies the process for obtaining the required information about HBA.



WebGIS (map portal) is a web map application that is used to view, browse, and present information displayed in the form of interactive map composition.

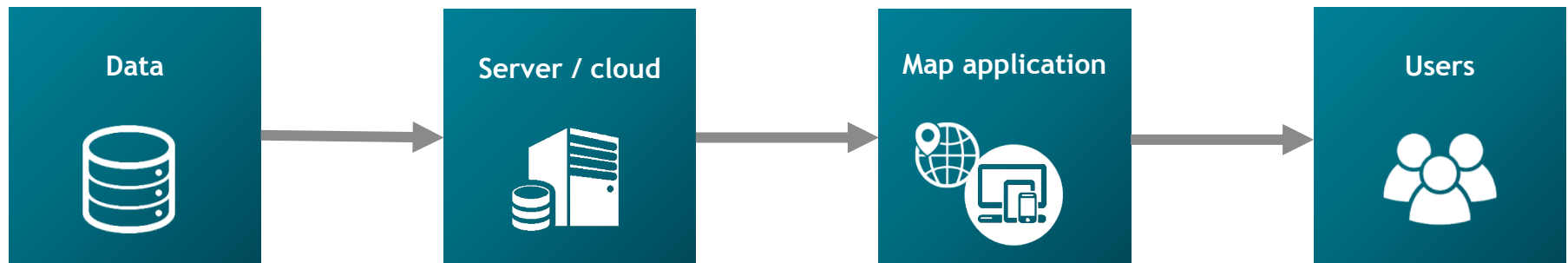
Deployment of WebGIS

Deployment of map portal and GIS in general requires useful data to provide comprehensive information that is easily accessible and can simplify related processes.

The priority is not to build a beautiful app, but to react to requirements on information obtaining, responsive design and „story telling“.

Main aim: to provide information (or story) not data





Why?

- A quick and effective way of spatial information dissemination
- Attractive presentation in easy to understand form
- Tool for linking data from different sources
- Digitization of agenda
- Many ways to establish and maintain WebGIS



Most common mistakes

1. We want GIS because it's trendy
2. Expensive IT product
3. No added value of data
4. User-unfriendly
5. No desktop software



Building information modeling is a computer-based process for modeling and managing buildings, constructions, and relevant data.

Advantages of using BIM:

- 3D visualization of buildings
- Data management
- Operational management
- Advanced analysis - energy analysis, static analysis, collision detection, construction simulation, feasibility assessment, etc.



Every platform hosts general data and specific data.

- general data:
 - cartographic basis: Who will use the platform? Depending on this, the basic map will be displayed on:
 - technical map: Cadastral Cards, topographical maps, etc.
 - user friendly map: general reference map (e.g. Google Maps, tourist maps, etc.)
- general information about location, for example data that help people in orientation, or property of the buildings (private or public), etc.
- specific data:
 - thematic layers: information on specific topics depending on the goals and the purposes of the platform.



Example - city of Mantova

Concern: **URBAN REGENERATION**

Goals

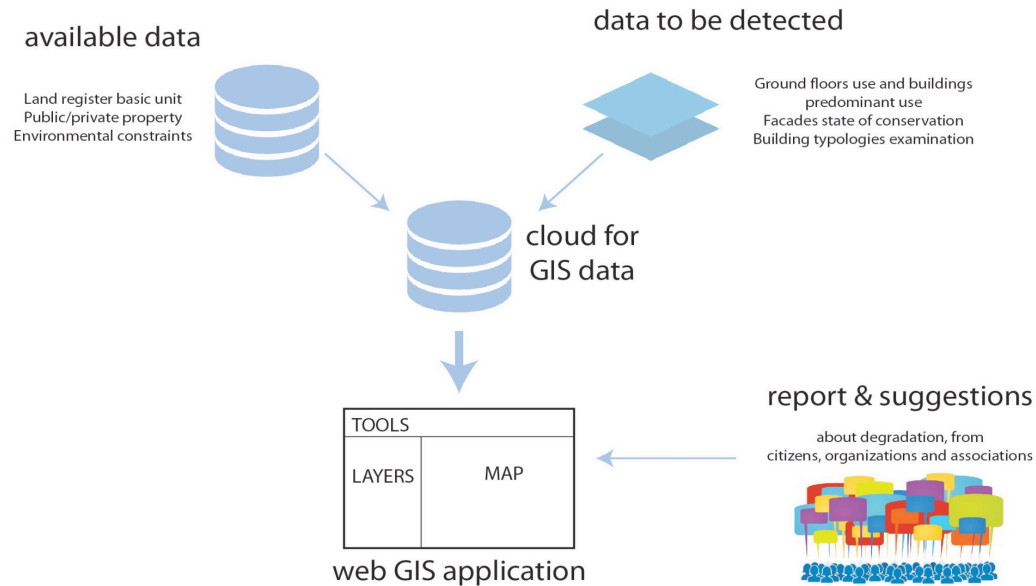
- at the technical level, the goal is to identify and monitor the areas to be regenerated
- at the strategic level, the goal is to define the actions to be taken by putting in relation the characteristics of the areas with their states of degradation.

Users

- citizens, organizations and associations that will use the platform to report situations of deterioration
- the local government officials who will process the data and report the results.



Example - city of Mantova



Final results

- obtain a map which represent the perceptions of degradation from people
- after crossing the perception map with technical data, define which areas are the regeneration area and plan concrete actions.
- monitor the areas before and after urban regeneration projects.



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THANK YOU FOR THE ATTENTION



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