MODULE 1

Global Challenges and Opportunities in Cultural Heritage Field

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This training module is part of HERITAGE-PRO training scheme containing five training modules that have been developed within the Erasmus+ Strategic Partnership **HERITAGE-PRO – Interdisciplinary Training for Professionals of Different Disciplines Towards Sustainable Management and Preservation of Cultural Heritage.** The training modules are available in English, German, Spanish and Swedish.

A team of six public and private European institutions, networks, development agencies and associations – all linked to cultural heritage preservation - developed the training scheme focussing on interdisciplinary aspects in cultural heritage preservation. The training at a glance:

HERITAGE-PRO **Training Scheme**
Training Module 1: Global Challenges and Opportunities in Cultural Heritage Field
Training Module 2: Efficient Team Working and Effective Interdisciplinary Conflict Resolution
Training Module 3: Valorisation of Cultural Heritage
Training Module 4: Participation
Training Module 5: Effective Communication in an Interdisciplinary Environment

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Table of Content

1.0 ABOUT THIS TRAINING

We live in an increasingly complex world. As a society of the 21st century we face new and pressing challenges at an accelerated pace: demographic explosion, inequalities, climate change, technological gaps, geopolitics, extremism, etc. Cultural Heritage (CH) is no exception. The threats it has to confront to safeguard its integrity and its future survival require integrated approaches led by interdisciplinary teams and approaches. The first module serves as an introduction to the whole training program. It explains the broad and changing concept of cultural heritage, presents the variety of stakeholders involved in its care, preservation, enhancement and enjoyment and stresses the need for interdisciplinary teams to accomplish the task. Module 1 also deals with the challenges and opportunities that the cultural heritage sector is facing and what can a cultural heritage manager do to make the best out of them.

This training was developed by an interdisciplinary team for interdisciplinary purposes in cultural heritage management facing global challenges also at local levels, which is the focus of Module 1. It is based on experiences of the European partners who want to further improve cultural heritage management. This training is based above all on the insight that the cooperation of different professional groups in complex conservation projects is a great challenge, which receives far too little attention in the relevant courses of university education and professional training. Therefore, this training is conceived as vocational further training, which wants to give you tools which you can use directly in your professional practice.

This training material has been created on the grounds of that previous analysis and conclusions, with the aim to better address the professional development needs of the experts working in the cultural heritage field and to support them when addressing an interdisciplinary work.

1.1 INTRODUCTION AND BACKGROUND

In 2017, the initiative VOICES OF CULTURE set up as a "structured dialogue between the European Commission and the cultural sector represented by more than 30 people affiliated to cultural associations, NGOs and other bodies with the main objective to provide a channel for the voice of the cultural sector in Europe to be heard by EU policy makers". As a result of a session on "Skills, Training and Knowledge Transfer: traditional and emerging heritage" a report was published[1]. The conclusions of the report show that **education and training in cultural heritage professions require broader transversal skills, in accordance with the challenges the sector is facing**. In the European Year of Cultural Heritage 2018 the objective was set "to support the development of specialised skills and improve knowledge management and knowledge transfer in the cultural heritage sector, taking into account the implications of the digital shift"[2]. Therefore, from the start we could say that mainstreaming transversal skills and understanding of interdisciplinarity is a challenge for itself.

The interdisciplinary teams working in the CH field often have to combine the experience and capabilities of professionals from different areas of knowledge. Sometimes these areas seem apparently very distant, such as art history, archaeology, architecture, technology, regional development, finance, human resources or marketing, to name a few. Besides, these professionals will have different backgrounds, but also, and more importantly, they will have different personal visions, aims, purposes and objectives to meet.

The role of the CH manager is enriched, but at the same time, confronted to new difficulties. This can cause confusion and raise important doubts about how to approach different tasks. In this training

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[1] VOICES OF CULTURE, Brainstorming Report. Towards an integrated approach to Cultural Heritage for Europe – prospectus on skills, training and knowledge transfer for traditional and emerging heritage professions", October 2017.
[2] Decision (EU) 2017/864 of the European Parliament and of the Council of 17 May 2017 on a European Year of Cultural Heritage (2018)

course we will offer knowledge bases and tools that will help you reduce this feeling of uncertainty. To this end, we have created the following 5 modules:

- Module 1 – Global challenges and opportunities in the field cultural heritage
- Module 2 – Efficient team working and effective interdisciplinary conflict resolution
- Module 3 – Valorisation of cultural heritage
- Module 4 – Participation
- Module 5 – Effective communication in an interdisciplinary environment

The profession of a cultural heritage manager encompasses very diverse backgrounds (historians, art historians, archaeologists, architects, performing arts managers, musicologists, etc.). Likewise, the cultural heritage assets that a manager takes care of can be of very diverse nature and size: buildings, collections, intangible heritage, etc. Former experience and profiles also vary widely. We are aware of this miscellany. For these reasons, this course has been designed to allow **great flexibility** in its approach. Trainers and learners who wish to use it will find these **modules divided into units that can be adapted to specific personal needs**.

This material has been designed to **help CH managers to have a broader knowledge of disciplines and soft skills that can provide better performance in the management and care of heritage**. It is important to emphasize that a CH manager, like any manager, is not expected to be an expert in all these disciplines. He/she must know how to surround himself/herself with the experts who do have the knowledge, he/she must create the team and know how to manage it, how to orchestrate it. We hope this training course will help you in this task.

1.2 KEY WORDS

- Interdisciplinary approach
- Sustainable development
- Social cohesion
- Poverty reduction
- Climate change
- Digitization
- Tourism

1.3 TOPIC

Cultural heritage as a broad and changing concept is examined in this module. This will help understand the variety of stakeholders involved in its care, preservation, enhancement and enjoyment and the need for interdisciplinary teams to accomplish the task. In Module 2 of HERITAGE-PRO training you will find more about how to deal with efficient team working and interdisciplinarity.

In Module 1, it will be analysed why cultural heritage is valuable and worth being preserved and promoted. It will deal with the challenges and opportunities that the cultural heritage sector is facing in the 21st century, both from a global and a local perspective. It will explain the 2030 Agenda and the Sustainable Development Goals, how cultural heritage is implemented in these global interdisciplinary concepts and what can a cultural heritage manager do to contribute in achieving them, even at local levels. In Module 4 of HERITAGE-PRO training you can learn more about tools and instruments to engage diverse stakeholders at the local level in different participatory processes.

1.4 CHALLENGES

The world faces pressing societal, environmental and economic challenges. Cultural heritage is no stranger to this scenario. Its role is crucial to deal with current critical trends such as inequality, migration, gender issues, digitization, ageing societies, extremism, or climate change. Economic growth is not enough to guarantee a sustainable development. The 2030 Agenda is the most ambitious global programme ever adopted by the members of the United Nations. It addresses multiple social and environmental challenges with the aim to set the world on a path to a sustainable future by 2030. In addition to that, the European Commission has launched the **Green Deal** as a response to accelerating climate change, which poses an existential threat not just to Europe but to the entire planet with an aim of becoming the world's first climate-neutral continent by 2050.

What can the cultural heritage sector do to contribute to attain the 2030 Agenda? But, first of all, what exactly is cultural heritage? It is a complex concept that has evolved throughout history. Cultural heritage is both a tool and a result of growth[3]. What we consider valuable today was maybe not contemplated as such only a century ago. So, who decides what cultural heritage is? Or what is valuable and deserves to be preserved and promoted or not?

Once we have a common understanding of what cultural heritage is, what can you as a cultural heritage manager do? Understanding the scope of today's challenges can help you reflect on your position, not only as a manager of a particular cultural asset, but as an integral member of a society where the interests and visions of different stakeholders and fields converge. The complexity of the task requires an interdisciplinary approach in which the cultural heritage manager will be able to coordinate the work of professionals from distinct areas.

1.5 REQUIREMENTS

To study this module, it would be preferable if you have had some experience as a cultural heritage manager. It does not matter if it is tangible or intangible heritage, but at least two years of fieldwork will provide you with a better understanding of the contents presented here. A given level of social and communication skills is also appropriate. But above all, it is essential to have an open mind and empathy to be able to integrate and manage in a team the expertise and capabilities of professionals from very different backgrounds.

1.6 LEARNING OUTCOME

After completing this module, you will

- be aware of the changing concept of cultural heritage and the increasing complexity that requires more and more interdisciplinary teams
- know about the different stakeholders involved in the cultural field
- understand what makes cultural heritage a valuable asset
- have a broad vision of today's global challenges and the intricacy of the interdisciplinary work that this vision requires
- understand how cultural heritage can play its role to achieve key societal, environmental and economic goals
- be able to reflect on your role as cultural heritage manager in this multifaceted scenario and to envisage the opportunities ahead

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[3] BENHAMOU, F. and THESMAN, D., *Valoriser le patrimoine culturel de la France*, Conseil d'Analyse Économique, Paris, 2011.

1.6.1 KNOWLEDGE AND UNDERSTANDING

After completing this module, you will understand the broad and changing concept of cultural heritage. You will get familiar with the variety of domains and stakeholders involved in the cultural heritage realm and with the need to coordinate multidisciplinary teams to gain a holistic approach of your role as cultural heritage manager. You will learn what makes cultural heritage valuable in the economic, social, cultural and environmental fields. You will gain knowledge of the contemporary global challenges and how can cultural heritage support sustainable development from an interdisciplinary perspective.

1.6.2 COMPETENCES AND SKILLS

After completing this module, you will become conscious of the challenges facing today's society in general, and the cultural heritage sector in particular, it will help you gain understanding of your position in a multidisciplinary fabric where different interests and visions converge. It will broaden the vision of your role as a cultural heritage manager and it will inspire your capacity to identify potential new opportunities. It will also encourage the reflection on your ability to create networks with professionals from different areas and on your ability and flexibility to manage interdisciplinary teams.

1.6.3 APPROACH

In this module, sources and knowledge from areas of diverse expertise: political, social, economic, etc. have been combined. With this approach the intention is to take the cultural heritage manager beyond the usual boundaries of his/her area of knowledge, as a first step to embrace the versatility of an increasingly interdisciplinary role.

1.7 SUMMARY OF UNITS

The following five learning units will guide you through the most important elements of this module that is structured as following:

UNIT 1 – What is cultural heritage? A concept that involves a variety of stakeholders.
UNIT 2 – What is recognised as cultural heritage. Why is it valuable
UNIT 3 – Global challenges
UNIT 4 – Sustainable development and cultural heritage
UNIT 5 – Challenges and opportunities for cultural heritage

It is recommended to work through the learning units in the continuity of their sequence, as they build upon one another other and link to other learning units of this training. Exercises complement the training. References to further literature and learning materials as well as a glossary at the end will deepen the overall understanding of the training topics.

1.7.1 UNIT 1. WHAT IS CULTURAL HERITAGE? A CONCEPT THAT INVOLVES A VARIETY OF STAKEHOLDERS

Cultural heritage is a multifaceted and changing social concept. It provides different types of utilities, of services to different agents that value it accordingly. It is a resource of education, for the enjoyment and recreation of collective identities, for the development of services related to tourism, for the economic development and creation of jobs in regions. There are a variety of actors related to heritage and policy guidelines that ensure that every citizen has the right to access and enjoy this relevant cultural heritage. Cultural heritage has the potential to bring material and non-material benefits to the community. The other face of this reality is that the whole society should also acknowledge its responsibility towards heritage, as it is also a collective duty to ensure protection at a suitable level and transmission to future generations in reasonable conditions.

There are a huge variety of elements that constitute the heritage of a society. Some elements are really old, whereas some others are relatively new and nearly contemporary, as in the case of industrial heritage that only lost its productive capacity a couple of decades ago. Some other elements are tangible, whereas some others are intangible. Some elements are private property, whereas public or collective institutions are the owners of some others. However, there are always some common characteristics that determine what we can consider a given asset as part of cultural heritage. First, they are elements referred to social groups; second, they have been inherited from the past (even the very recent one); last, contemporary societies are the ones who recognize its value and thus, the ones that decide what is valued and deserve funding and regulation to be preserved. There is a dynamic understanding of what is heritage, and, in any case, heritage has to be considered as such by a community or, alternatively, it has to be formally recognized or designated as such by a cultural legitimated institution.

The election of what is going to be considered cultural heritage and, accordingly, preserved to be transmitted can be grounded in objective criteria (for example, age, an old age makes it valuable as a material representation of the past), or in subjective criteria. In this last case, it can be the valuation of that asset as established by a group of experts that recognize its aesthetic or civilization values (as in the 'cultural goods' Italian doctrine that dominates most of the legal regulation of cultural heritage in European countries). It can further be a collective valuation of a community that assigns social value based on the shared symbolic value of a given heritage asset that enhances social cohesion in that community.

Each society makes the decisions regarding what is to be valued and valorised in order to enjoy it in the present and transmit it to future generations. In operational terms, UNESCO considered cultural and natural heritage a "cultural domain" in its own in the 2009 UNESCO Framework for Cultural Statistics[4]. Figure 1 below presents UNESCO's cultural domains conceptualized as 'thematic' areas with social and economic activities in common.

The inclusion of cultural and natural heritage is particularly relevant for Europe, where human settlements have modelled wide extensions of the territory, creating valuable cultural landscapes (one of the activities included in this domain) that represent 'combined works of nature and by humans' that 'express a long and intimate relationship between people and their natural environment'. Cultural heritage includes 'artefacts, monuments, and groups of buildings and sites that have a diversity of values including symbolic, historic, artistic, aesthetic, ethnological or anthropological, scientific and social significance'. Natural heritage 'consists of natural features, geological and physiographical formations and delineated areas that constitute the habitat of threatened species of animals and plants and natural sites of value from the point of view of science, conservation or natural beauty. It includes nature parks and reserves, zoos, aquaria and botanical gardens.

The activities related to this domain include the study, documentation and archiving, material preservation and the management and communication related to the sites, collections and artefacts that

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[4] http://uis.unesco.org/sites/default/files/documents/unesco-framework-for-cultural-statistics-2009-en_0.pdf

have intrinsic value and social significance.

This domain includes also museums: traditional museums as defined by ICOM in 2007[5], as well as living museums and virtual museums. The traditional definition of ICOM is that of a 'non-profit, permanent institution in the service of society and its development, open to the public, which acquires, conserves, researches, communicates and exhibits the tangible and intangible heritage of humanity and its environment for the purposes of education, study and enjoyment', a definition under revision these days with the opening of a participatory process[6]. In Module 4 of HERITAGE-PRO training you can learn more about tools and instruments to engage diverse stakeholders at the local level in different participatory processes.
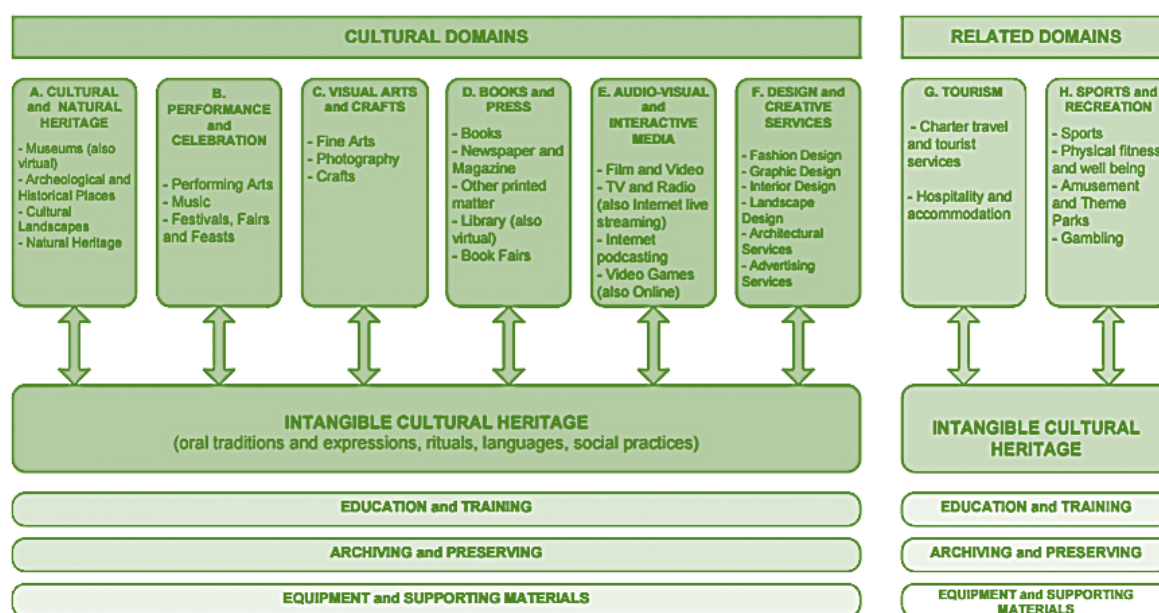
Figure 1: UNESCO Framework of Cultural Statistics

Intangible cultural heritage is a transversal domain as the inclusion of this dimension in any creative asset is critical to measure the full breadth of the cultural expression. Intangible heritage elements can be found in the performance and celebration domain, in religious festivals, in visual arts and crafts, in traditional crafts, in books and press, in audio-visual and interactive media, in design and creative services, as well as in the related domains of tourism and sports and recreation. In terms of its recognition, intangible cultural heritage has a unique feature, as it can only be defined as such when a community recognises it as part of its heritage. This is the reason why the term 'heritage communities' is used in many instances to designate those who create, maintain and transmit such heritage.

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[5] http://archives.icom.museum/definition.html
[6] https://youtu.be/e6eROC9Lk0A

Box 1: Intangible cultural heritage as a transversal domain

For intangible heritage, which is considered a transversal domain in the 2009 UNESCO Framework, as it permeates all the others, the 2003 UNESCO Convention for the Safeguarding of the Intangible Cultural Heritage had already proposed five broad sub-domains in which intangible CH is manifested:

- Oral traditions and expressions, including language as a vehicle of the intangible CH

- Performing arts

- Social practices, rituals and festive events

- Knowledge and practices concerning nature and the universe

- Traditional craftsmanship

There are, of course, manifestations that fall into multiple domains and the boundaries are fluid and dependent on social and cultural contexts. Please note that any of the five sub-domains above imply the centrality of the communities in order to recognize, practice and transmit the symbolic and practical elements related to those manifestations[7].

Diagram 1 presents an overview of the system of cultural heritage in European societies. A contemporary vision of cultural heritage necessarily includes a variety of actors and stakeholders. No matter if we consider a privately owned heritage resource (e.g. a historic building with private residential use) or a resource that is owned by a public institution (a public museum, for instance), the symbolic and communitarian values of that element necessarily involve a multiplicity of agents, that you, as cultural heritage manager will have to know and coordinate. These agents are related to this cultural heritage in terms of rights, duties and responsibilities. An example of this can be drafted for the context of economic preservation of urban landscape, where we can think of three big groups of stakeholders:

- Local inhabitants, itself a motley group with possible different interests for residents, services and access, commercial establishments owners and workers, preservation activists, citizen initiatives…

- Building entrepreneurs, seeking profitability

- Policy makers and technocrats, seeking re-election, interested in creating jobs and economic activities, steering long term development objectives, looking for the strategic positioning of the city through branding and tourism…

This rich reality brings together the potential existence of contrasted or contrary interests in many dimensions: short run and long run interests, privative and communitarian interests, power relationships, territorial tensions… As a consequence, the cultural heritage professional should learn how to manage conflict and how to propose and conduct negotiation processes that will balance those interests, putting the heritage element and the communities at the centre of the decision-making processes. (*You will find more information about this subject in Module 4 - Participation*).

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[7] https://ich.unesco.org/doc/src/01857-EN.pdf

Diagram 1: Influencing factors around cultural heritage

1.7.2 UNIT 2 – WHAT IS RECOGNIZED AS CULTURAL HERITAGE. WHY IS IT VALUABLE

In accordance with UNESCO's Convention Concerning the Protection of the World Cultural and Natural Heritage of 1972[8], the following shall be considered as "cultural heritage":

- Monuments: architectural works, works of monumental sculpture and painting, elements or structures of an archaeological nature, inscriptions, cave dwellings and combinations of features, which are of outstanding universal value from the point of view of history, art or science;

- Groups of buildings: groups of separate or connected buildings which, because of their architecture, their homogeneity or their place in the landscape, are of outstanding universal value from the point of view of history, art or science;

- Sites: works of man or the combined works of nature and man, and areas including archaeological sites which are of outstanding universal value from the historical, aesthetic, ethnological or anthropological point of view.

And, as later on stated by UNESCO in 2011[9], cultural heritage does not end at monuments and collections of objects. It also includes traditions or living expressions inherited from our ancestors and passed on to our descendants, such as oral traditions, performing arts, social practices, rituals, festive events, knowledge and practices concerning nature and the universe or the knowledge and skills to produce traditional crafts.

In Europe, the relevance of cultural heritage has been gaining prominence at the political level since the 1970s. At that time, the change from a conservation-led to a value-led understanding to cultural heritage began. It also became evident that tangible and intangible assets have a clear and strong connection. They started to be perceived as integral parts of a holistic approach. In 2005 the Faro

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[8] https://whc.unesco.org/en/conventiontext/
[9] https://ich.unesco.org/en/what-is-intangible-heritage-00003

Convention (Council of Europe) stated the importance to put people and human values at the core of cultural heritage. Hence the growing need to foster the development of interdisciplinary skills for cultural heritage managers.

Later on, in May 2013, the Hangzhou Declaration (UNESCO) recognized **the value of cultural heritage as a driver for sustainable development.** In 2014 the EU Council of Ministers recognised CH "as a strategic resource for a sustainable Europe". They adopted a series of documents that reinforced this declaration:

- Conclusions on Cultural Heritage as a Strategic Resource for a Sustainable Europe[10]
- Conclusions on Participatory Governance of Cultural Heritage[11]
- Communication towards an Integrated Approach to Cultural Heritage for Europe[12]

In 2015 the European Commission designed a new roadmap for research and innovation and set out a series of policy recommendations in the report "Getting Cultural Heritage to Work for Europe"[13] where it "aimed to promote cultural heritage as a production factor and an investment opportunity for the economy as well as a catalyser for social cohesion and environmental sustainability". This political evolution in the understanding of the relevance that cultural heritage has for Europe, led to the year 2018 being declared European Year of Cultural Heritage. With this statement the European institutions called to join forces and to raise awareness on the importance of cultural heritage as a strategic resource for a sustainable, resilient, and inclusive Europe.

The value of cultural heritage spreads to the economic, social, cultural and environmental fields. Thus, CH is a key driver of sustainable development across a wide range of policy areas. In fact, investment in the protection and good use of CH has a multiplier effect that reaches beyond that initially intended. Often, upstream investments result in medium and long-term unplanned but beneficial impacts. CH involves significant costs but is a great lever for the recovery of an image and the attractiveness of a place or a region. As such, it can be considered as an asset that must be valued.

In 2014, the "Cultural Heritage Counts for Europe" project[14] analysed approximately 140 studies and conducted a survey that proved the broad scope of the CH impacts at local, regional, national, and European levels. The data and examples collected showed that the impact and benefits of cultural heritage positively affect a wide range of domains, represented in Figure 2.

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[10] https://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/educ/142705.pdf
[11] https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52014XG1223%2801%29
[12] http://www.europarl.europa.eu/doceo/document/A-8-2015-0207_EN.html
[13] https://ec.europa.eu/programmes/horizon2020/en/news/getting-cultural-heritage-work-europe
[14] https://www.europanostra.org/our-work/policy/cultural-heritage-counts-europe/
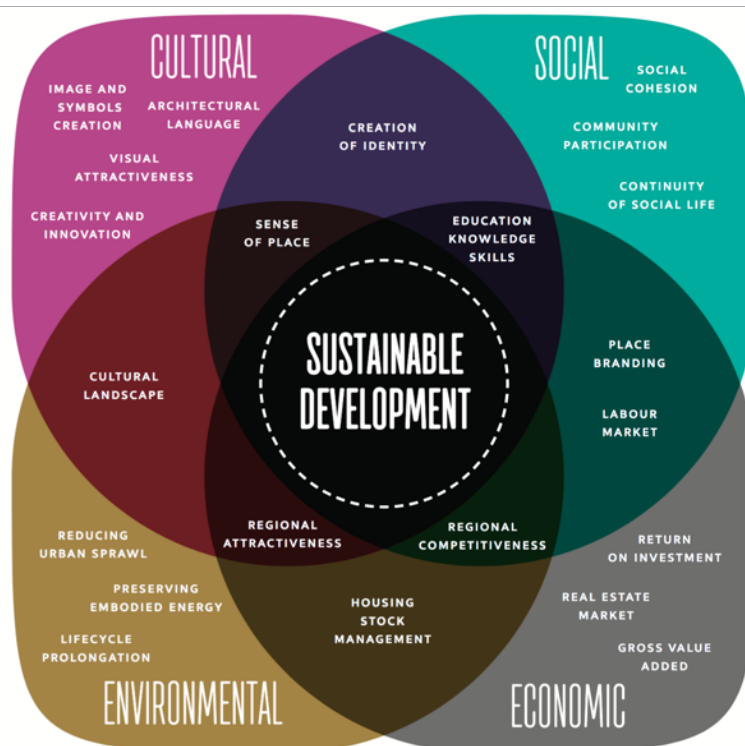
Figure 2: CH positive impacts in 4 domains. Source "Cultural Heritage Counts for Europe"

Box 2. Results of the "Cultural Heritage Counts for Europe" project summarised in 10 key findings and opportunities of interdisciplinary collaboration for you as cultural heritage manager

1. Cultural heritage is a key component and contributor to the attractiveness of Europe's regions, cities, towns and rural areas in terms of private sector inward investment, developing cultural creative quarters and attracting talents and footloose businesses — thereby enhancing regional competitiveness both within Europe and globally. **The CH manager should not miss the opportunity to interact with local development agencies, cluster organizations and with the local and regional public administration. Creating synergies with these agents can make the most of the potential that cultural heritage offers as a magnet for investment and tourism.**

2. Cultural heritage provides European countries and regions with a unique identity that creates compelling city narratives providing the basis for effective marketing strategies aimed at developing cultural tourism and attracting investment. **As a cultural manager, you are aware of the potential that cultural heritage has as a support to strengthen the region's brand. You can build a common strategy with the authorities in charge of attracting foreign investment and of national, regional and local tourism.**

3. Cultural heritage is a significant creator of jobs across Europe, covering a wide range of types of job and skill levels: from conservation-related construction, repair and maintenance through cultural tourism, to small and medium-sized enterprises (SMEs) and start-ups, often in the creative industries. **As a CH manager, consider the possibility of exploring potential synergies with national or regional authorities in charge of programmes aimed at boosting employment, with creative start-up incubators or with entrepreneurship programs for the cultural and**

creative industries.

4. Cultural heritage is an important source of creativity and innovation, generating new ideas and solutions to problems, and creating innovative services — ranging from digitisation of cultural assets to exploiting the cutting-edge virtual reality technologies — with the aim of interpreting historic environments and buildings and making them accessible to citizens and visitors. **Never miss the opportunity to explore what technology can offer to your cultural heritage asset by teaming up with ICT (Information and Communication Technologies) experts. Fields such as Artificial Intelligence, Virtual Reality, Augmented Reality or 360º video, can significantly improve users' experience, participation, access to cultural heritage and engagement of new audiences.**

5. Cultural heritage has a track record on providing a good return on investment and is a significant generator of tax revenue for public authorities both from the economic activities of heritage-related sectors and indirectly through spillover from heritage-oriented projects leading to further investment. *(You will learn more about valorisation of cultural heritage in Module 3).*

6. Cultural heritage is a catalyst for sustainable heritage-led regeneration. *(In units 3 and 4 we will deal extensively with sustainable development and how cultural heritage is concerned).*

7. Cultural heritage is a part of the solution to Europe's climate change challenges, for example through the protection and revitalisation of the huge embedded energy in the historic building stock[15]. **Apart from collaborating with your national and regional organisations in climate change and energy efficiency issues, e.g. soft maintenance of heritage buildings, you may consider as a cultural heritage manager getting involved in supranational networks related to climate change and cultural heritage such as the Climate Heritage Network[16].**

8. Cultural heritage contributes to the quality of life, providing character and ambience to neighbourhoods, towns and regions across Europe and making them popular places to live, work in and visit — attractive to residents, tourists and the representatives of creative class alike. **This aspect of cultural heritage opens up opportunities for you as a cultural heritage manager to work in interdisciplinary teams with environmentalists, urban planners, geographers and cultural landscape experts to contribute to the improvement of people's quality of life.**

9. Cultural heritage provides an essential stimulus to education and lifelong learning, including a better understanding of history as well as feelings of civic pride and belonging, and fosters cooperation and personal development. **The scope of cultural heritage in education is very broad and the possibilities are multiple. It can include formal or non-formal learning for children, youth, adults, at the basic level or expert level, etc. And therefore it can take many forms: school visits, educational games, conferences, publications, professional congresses, etc. This means that as a cultural heritage manager you can explore the possibility of building partnerships with schools, vocational training, public administrations or private institu-**

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[15] "In built environments there is a huge potential for saving energy. (…) Energy savings can be achieved through investments in technologies (such as renewable energy systems, energy efficient lightning, cooling, heating) but also through territorial management and behavioural lifestyle changes.(…) The amount of raw materials -water, etc.- and embedded energy savings can be a useful indicator for assessing environmental benefits from cultural heritage re-use." (Nocca, Fusco Girard, 2018)
[16] http://climateheritage.org/

tions related to education, with publishing houses, with technology companies that develop interactive educational games, etc. *(Please refer to Module 2 for matters related to team building).*

10. Cultural heritage combines many of the above-mentioned positive impacts to build social capital and helps deliver social cohesion in communities across Europe, providing a framework for participation and engagement as well as fostering integration. **Interdisciplinary work with sociologists, anthropologists, experts in migration, organizations working for the integration of people with disabilities or people at risk of social exclusion, can open up for you a myriad of opportunities to leverage the power of cultural heritage as a key driver of a more inclusive and reflective society.**

1.7.3 UNIT 3 – GLOBAL CHALLENGES

In September 2015, 193 Members of the United Nations (UN) agreed on 17 Sustainable Development Goals (SDG). They came into effect on 1 January 2016 and will run until 2030. The SDG are universal and address a wide range of the social and environmental greatest challenges. They are not just a political roadmap for national governments, they speak to all stakeholders as a common goal to accomplish the 2030 Agenda. Consequently, cultural heritage has also a key role to play.

The ground on which the 2030 Agenda is built is **sustainable development**. The three dimensions of sustainability are: environment, society and economy. The balance between these three elements is fundamental. Economic growth that has negative effects on the environment or that increases inequalities between segments of the population is not sustainable at all. Sustainable development demands a more harmonious equality of economic, social and environmental matters, ensuring that development in one dimension does not have negative impacts on other dimensions, and even has positive impacts.

The UN document "Transforming our world" [17] describes the challenges our world is facing: "*Billions of our citizens continue to live in poverty and are denied a life of dignity. There are rising inequalities within and among countries. There are enormous disparities of opportunity, wealth and power. Gender inequality remains a key challenge. Unemployment, particularly youth unemployment, is a major concern. Global health threats, more frequent and intense natural disasters, spiralling conflict, violent extremism, terrorism and related humanitarian crises and forced displacement of people threaten to reverse much of the development progress made in recent decades. Natural resource depletion and adverse impacts of environmental degradation, including desertification, drought, land degradation, freshwater scarcity and loss of biodiversity, add to and exacerbate the list of challenges which humanity faces. Climate change is one of the greatest challenges of our time and its adverse impacts undermine the ability of all countries to achieve sustainable development. Increases in global temperature, sea level rise, ocean acidification and other climate change impacts are seriously affecting coastal areas and low-lying coastal countries, including many least developed countries and small island developing States. The survival of many societies, and of the biological support systems of the planet, is at risk.*"

The 17 Sustainable Development Goals fall into 169 targets. The 2030 Agenda is "a plan of action for people, planet and prosperity. It also seeks to strengthen universal peace in larger freedom." The SDG aim to end poverty and bring prosperity in all its forms, they call for social inclusion, environmental sustainability, and peace and good governance to all countries and all people. They are interrelated, action for one goal must not have negative implications for another.

Society and the environment would be deeply and positively transformed if we succeed to attain the

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[17] https://sustainabledevelopment.un.org/post2015/transformingourworld

SDG. They can contribute to the shaping of policies, strategies, funding and action across a wide range of sectors until 2030. They also have strong relevance for the cultural heritage field.

The 17 Sustainable Development Goals are the following (we highlight in bold and underline those that most directly affect cultural heritage), but target 11.4 directly mentions it:

SDG	Title	Description
SDG 1	End poverty in all its forms everywhere.	Expand support for the poor and address the root causes of poverty. Developing countries will need special support.
SDG 2	End hunger, achieve food security and improved nutrition and promote sustainable agriculture.	Ensure everyone has access to safe, nutritious food on a regular basis and a healthy diet; and that agriculture is resilient and operates in harmony with nature.
SDG 3	Ensure healthy lives and promote well-being for all at all ages.	Ensure universal access to sexual and reproductive health services, prevent infectious diseases, and tackle public health issues.
SDG 4	**Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.**	**Everyone has good-quality education that enables them to participate fully in society, achieve their potential, and live in harmony with other people and with nature.**
SDG 5	Achieve gender equality and empower all women and girls	Eliminate all forms of sexual discrimination, violence and harmful practices against women and girls, and uphold sexual and reproductive health and rights, so they are able to participate fully in public, economic and political life.
SDG 6	Ensure availability and sustainable management of water and sanitation for all.	Ensure everyone has a reliable, safe water supply and good quality sanitation, managed in harmony with nature, in the context of climate change and competition for water.
SDG 7	Ensure access to affordable, reliable, sustainable and modern energy for all.	Ensure everyone has access to electricity, clean fuels and technologies for cooking, and increasing the use of renewable energy everywhere.
SDG 8	Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.	Protect employee rights and promote safe and secure working environments for all workers, especially those in precarious employment. Support the development of economies where everyone benefits, and that operate in harmony with nature.
SDG 9	Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation.	Develop good-quality, sustainable and resilient infrastructure. Foster innovation and research that will advance sustainable development.
SDG 10	Reduce inequality within and among countries.	Reduce inequalities in income and opportunity between and within countries, linked with gender, age, disability, ethnicity or other shared characteristic.
SDG 11	**Make cities and human settlements inclusive, safe, resilient and sustainable.**	**Develop cities, towns and communities that are sustainable as places for people and communities to live and work in, and in harmony with nature, in the context of rapid social change and a changing climate.**
SDG 12	**Ensure sustainable consumption and**	**This Goal is key to achieving a wide range of other Goals, embracing the challenge of produc-**

	production patterns.	**ing and consuming less, encouraging reuse and reducing waste, reducing pollution and using natural resources in sustainable ways.**
SDG 13	**Take urgent action to combat climate change and its impacts**	**This Goal will require both 1) the incorporation of measures to fight climate change into national planning, strategies and policies and 2) greater public awareness and education on reducing climate impacts and finding ways to live with climate impacts.**
SDG 14	Conserve and sustainably use the oceans, seas and marine resources for sustainable development.	Enhance scientific research, and reduce the impacts of human activity on the oceans and marine life.
SDG 15	Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss.	Sustainably manage land-based habitats and natural resources such as forests, restore damaged landscapes and halt the spread of deserts. Safeguard biodiversity and ecosystems.
SDG 16	**Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels.**	**Ensure everyone has access to justice and information. Transparent and accountable institutions are necessary for achievement of this and other goals.**
SDG 17	Strengthen the means of implementation and revitalise the Global Partnership for Sustainable Development Finance	Partnerships within and between communities, sectors and countries are essential to achieving the SDGs

Cultural heritage in all its diversity is a reflection of our tangible and intangible natural and cultural testimonies. Its protection and promotion are one of the major challenges of our century. CH is a unique, irreplaceable asset, and has a key role to play in the achievement of the SDG. CH enables intercultural and intergenerational dialogue, promotes learning, inspiration and critical thinking. As such, it acts as a lever in education and social cohesion. Participation in cultural heritage matters is open and democratic. It is inclusive to people with diverse abilities and backgrounds. It allows everyone to contribute, promoting broad-minded and fair societies.

CH also supports economic growth, especially through education, tourism and the cultural and creative industries. It can make a significant contribution to local economies, notably in marginalised areas, helping address social and economic inequalities.

Education and research are explicitly recognised in a number of the SDGs. Protection of cultural and natural heritage is also explicitly recognised in the SDGs, as are participation in society and cultural life.

Some goals involve cultural heritage more directly than others, notably:

- **Goal 4**: Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all. And specifically target 4.7: By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including, among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non-violence, global citizenship and appreciation of cultural diversity and of culture's contribution to sustainable development.

- **Goal 11**: Target **11.4** Strengthen efforts to protect and safeguard the world's cultural and natural heritage and **11.3** By 2030, enhance inclusive and sustainable urbanization and capacity for par-

ticipatory, integrated and sustainable human settlement planning and management in all countries

- **Goal 12**: Ensure sustainable consumption and production patterns. And specifically target 12.8: By 2030, ensure that people everywhere have the relevant information and awareness for sustainable development and lifestyles in harmony with nature.

- **Goal 13**: Ensure healthy lives and promote wellbeing for all at all ages. And specifically target 13.3: Improve education, awareness-raising and human and institutional capacity on climate change mitigation, adaptation, impact reduction and early warning.

- **Goal 16**: Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels. And specifically targets 16.7: Ensure responsive, inclusive, participatory and representative decision-making at all levels; and 16.10: Ensure public access to information and protect fundamental freedoms, in accordance with national legislation and international agreements.

What can cultural heritage managers do to support the achievement of these goals?

Cultural heritage can play a leading role in supporting the achievement of the SDG. Few sectors are better placed to help bridge the gap between political strategies and people's lives and individual experiences. As a cultural heritage manager you will have to collaborate with professionals from various disciplines to achieve a coordinated and effective contribution to the sustainable development goals. To do so at the national, regional and local levels you can work on two fields: advocacy and implementation.

Here we present examples of 6 specific things you can do as a cultural heritage manager:

1. Provide public access and encourage participation for all. People should have the right "to know, understand, visit, make use of, maintain, exchange and develop cultural heritage and cultural expressions, as well as to benefit from the cultural heritage and cultural expressions of others."[18] (For specific information on participation please refer to Module 4).

2. Support and provide learning opportunities. Education, whether formal, informal or lifelong learning, and capacity building are crucial for the respect of cultural diversity, of environmental integrity, to fight populism and to reduce inequalities related to poverty or gender issues.

3. Get involved in sensitization and awareness campaigns to help people care about problems and challenges. This will encourage citizens, not only to be informed, but also to feel empowered to become part of the solution.

4. Promote inclusion "irrespective of age, sex, disability, race, ethnicity, origin, religion or economic or other status".

5. Promote multidisciplinary partnerships, support fruitful interactions between different agents of society.

6. Lobby on sustainability issues. As a cultural heritage manager, you will interact with policy makers and the public administration. Take this opportunity to positively influence on sustainable development. You could probably contribute to the Voluntary National Reviews[19] that are carried out at national and regional level in your country.

Ensuring active participation of the various stakeholders involved entails coordinating interdisciplinary

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[18] http://www.unesco.org/culture/culture-sector-knowledge-management-tools/10_Info%20Sheet_Right%20to%20Culture.pdf
[19] https://sustainabledevelopment.un.org/vnrs/

skills. As we saw in unit 2, your work as a cultural heritage manager will open up to new opportunities by collaborating and establishing networks with professionals from wide-ranging fields (sociologists, technologists, ecologists, urban planners, tourism specialists, education specialists, etc.). *(You can learn more about interdisciplinary team management in Module 2 and about participation in Module 4).*

1.7.4 UNIT 4 – SUSTAINABLE DEVELOPMENT AND CULTURAL HERITAGE

Sustainability refers to development that meets the needs of the present generations without compromising the capacity of future generations to meet their own needs. In this unit, we focus in the relationship between cultural heritage and sustainable development.

Some elements of cultural heritage are of relevance not only for their local communities, but also for a larger group of stakeholders. In the limit, some elements are considered as 'global public goods', which is a category that refers to the widest scope of beneficiaries of public goods. This is a category of economic goods whose consumption is non-rival and non-excludable, where, for instance, climate change is included[20]. In accordance with this global vision, UNESCO's approach to sustainable development considers the global challenges and the global capacity of cultural heritage to achieve sustainable development. Actually, UNESCO highlights that all its Cultural Conventions are aimed at safeguarding culture and creativity: tangible to intangible heritage, cultural diversity and diversity of creative industries. Moreover, all the Conventions have profound implications for development and are firmly grounded in a human-rights approach.

Box 3: UNESCO and development

Examples of how the Conventions contribute to development include the UNESCO designated sites, such as the nearly 1000 World Heritage properties and over 500 Biosphere Reserves, which provide ideal laboratories where innovative heritage-driven approaches to sustainable development are tested. Under the International Fund for Cultural Diversity (IFCD), established in the framework of the UNESCO 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions, support is provided on a regular basis to developing countries, including non-governmental organisations, for projects in the fields of cultural policies and cultural industries[21].

There are two complementary visions to better understand sustainable development and cultural heritage:

The sustainable development of cultural heritage

Sustainability is related to the intergenerational aspects of cultural heritage. This is a resource that is inherited from the past (even from the closest past), that is valued and preserved according to contemporaneous criteria and subject to current threats, and that is to be passed to future generations. The choices of contemporaneous agents about cultural heritage are always hard to determine; they are taken in uncertainty conditions, there are multiple agents, often with contrary interests, there are limited human, technological and economic resources, the preferences of some people are not taken

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[20] Mitigating climate change is a global public good because citizens of all countries stand to benefit from it and some people benefitting from it does not mean others would benefit less (https://www.rsis.edu.sg/rsis-publication/rsis/co17174-growing-importance-of-global-public-goods-the-case-of-climate-change/#.Xalq--czaqA)
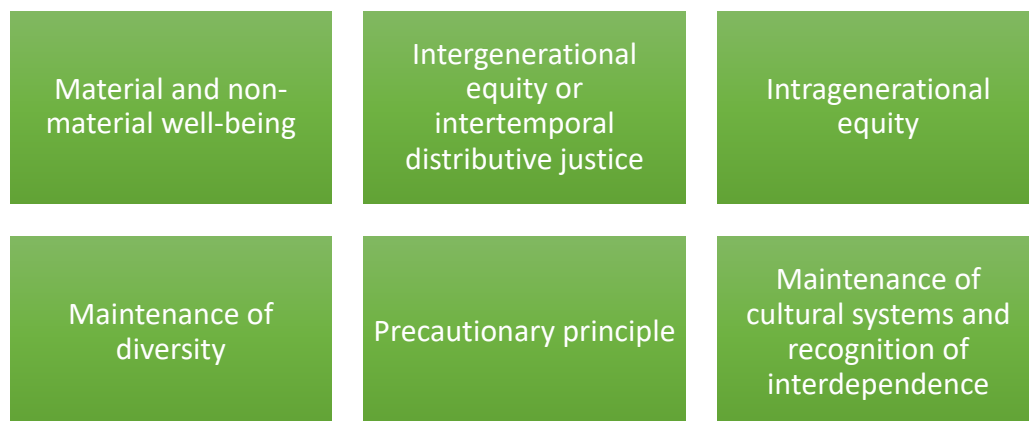[21] http://www.unesco.org/new/en/culture/themes/culture-and-development/the-future-we-want-the-role-of-culture/the-unesco-cultural-conventions

into account… Extend now these problems to the preferences of future generations to better under-stand the intergenerational dimension of sustainability. Cultural heritage can be exposed to irreversible damage and losses because of its fragility. This is quite similar to the problem of limited natural re-sources and the dilemmas for natural heritage conservation.

Sustainability requires responsiveness and adaptability anchored in sound principles that recognize the many and diverse values related to cultural heritage and its communities. Environmental changes and security risks menace cultural heritage (as we have seen in Unit 3), but also changes that affect the intellectual integrity of cultural heritage (related to the intangible dimensions of heritage that are also embedded in material manifestations) can challenge the existence of resources to be transmitted to future generations.

The concept of cultural sustainability, as presented by D. Throsby[22], highlights how cultural and natural resources need management over time to ensure that the long-lasting characteristics and values of heritage can be preserved and enhanced. There are six principles that characterize culturally sustain-able development (Throsby, 2013). We present them in Diagram 2 below. They relate to material and non-material impacts derived from cultural heritage, and consideration of justice both among members of the same generation (intra-generational and cultural diversity), and among members of different generations.

This has several implications in terms of management. First, the sustainability of cultural heritage re-sources has to be guaranteed by the professional management, subject to good practices and codes of ethics. Second, sustainability has to do with intergenerational equity, a sort of social contract be-tween generations by which the welfare of our descendants should be taken into account. Third, though cultural heritage is related to a given community, it is often a "global public good", a category of economic goods that is strongly universal in terms of countries, people and generations. The heritage elements declared to be "World Heritage" by UNESCO get inscribed in the list on the basis of the compliance of several criteria that ensure their "global public good" condition. At the international level, the inscription is associated to the global acknowledgement and awareness of the qualities of that good and increases the possibilities of suitable preservation investment. However, this brings also some negative side effects. The global visibility of the resource can make it become a war target or suffer terrorist attacks. The congestion in the excessive access and use can deteriorate the resource and can make it nearly impossible to enjoy any meaningful experience to visitors. And finally, the re-duction of the protection of "minor" elements that are not covered by the declaration is negative, as those elements are absolutely needed to preserve the integral value of the resource.

Material and non-material well-being	Intergenerational equity or intertemporal distributive justice	Intragenerational equity
Maintenance of diversity	Precautionary principle	Maintenance of cultural systems and recognition of interdependence

Diagram 2: Six principles of sustainable development for cultural capital

Cultural heritage to achieve sustainable development in rural and urban areas

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[22] THROSBY, D., *Cultural sustainability*, A Handbook of Cultural Economics, chapter 22, Edward Elgar Publishing, 2003

The integration between historic and natural resources with local communities is the best strategy to guarantee the sustainable development of cultural heritage in **rural areas**. This is an opportunity to overcome challenges related to the ageing of rural populations and the abandon of lands, traditional crops, traditional and rural heritage, etc. Integrated conservation should promote local development, the development of places and, more important, of people, thus contributing both to material and nonmaterial welfare. There could be potential trade-offs between the usage of heritage to promote economic activity thought cultural tourism to compensate cultural and social loss (loss of identify, gentrification and loss of intangible heritage, trivialization and loss of relational values of the community).

Cultural heritage contributes to creativity, and creativity is the main leverage for integrated and sustainable conservation of cultural heritage. This refers to processes and to the systemic relationships between resources, places and societies by means of the integration of human and physical systems. Examples include social networks that enable social relationships and individual communications and cultural heritage systems that support use and understanding of languages, faiths, and social behaviour in cities. Processes should be further embedded in the so-called 'ethics of care'. At the end of the day, **heritage includes all forms and aspects of the environment resulting from the interaction between people and places through time**, as expressed in the Faro Convention (2005).

When focusing on **urban heritage** we can identify three related concepts that have to be integrated when dealing with sustainable development: city sustainability, city creativity and city resilience. The relationship between the urban system and heritage is particularly relevant and interesting for the European context, as European countries enjoy a great variety of historic cities and a rich and diverse urban heritage that is more than a bundle of individual architectonical master pieces. This can be directly observable when taking a look at any of the European cities that are designated World Heritage[23]. The three elements contribute to the generation of a virtuous circle, presented in Diagram 3 below, where creativity acts as a leverage to improve the city resilience and promotes sustainability. Cultural and natural resources are to be properly considered along with communities to achieve a balanced and inclusive development of ecological, social and human development.

Diagram 3: the virtuous circle of city sustainability and heritage

First, **city sustainability**, encompasses tangible and intangible aspects, such as the uses the citizens make of the city elements. Some of the dimensions of the tangible heritage of the city and sustainability are related with the concept of heritage and Baukultur, as in the Davos Declaration (2018)[24]. The Declaration highlighted the need to develop approaches to protecting and advancing the cultural values of the European built environment and for a holistic culture-centred approach to the built environment. Heritage plays an important role in city regeneration and the promotion of cohesion between residents. Culture has further demonstrated impact in fostering social cohesion and enhancing individual wellbeing. City sustainability also considers the effects of actions intended to preserve and valorise

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[23] https://www.ovpm.org/all-about-owhc/
[24] https://davosdeclaration2018.ch

cultural heritage on the local population. The investment on urban heritage can have unintended effects such as the displacements of local residents and business. Gentrification processes are well identified and have to be taken into account when considering city sustainability. A holistic approach to cultural heritage and city can be found in the UNESCO Recommendation on Historic Urban Landscape[25], as it considers the complex relations between tangible and intangible heritage to better contribute to liveability of urban areas, indicating the active engagement of a plurality of actors.

A good overview of the cultural resources for a wide representation of European cities can be found in the JRC (Joint Research Centre) 2017 edition of the Cultural and Creative Cities Monitor[26].

The sustainable management of cultural heritage in urban areas contributes to the whole city sustainability and heritage has been widely used as a catalyst for regeneration in material and social terms[27].

City creativity refers to the promotion of creative activities and its translation to urban landscapes. Creativity is known to better flourish in clustered activities. Creativity favours from the possibility of agglomeration economies, whereby providers, clients and different capabilities converge to a single location. In terms of urban planning, a suitable conservation of heritage assets along with the facilitation of spaces for inclusive urban creativity can contribute to the promotion of a sense of place and identity. Creativity contributes to sustainability as described by professor Landry[28]. Diagram 4 below identifies seven areas where the city as heritage and the creativity that emerges in the city contributed to the promotion of human, social and economic well-fare.

Heritage and the commons	Eco-consciousness and heritage awareness	Healthy urban planning
• Heritage resources, independently from their ownership, bear a value that is held in common and are, in this sense, common goods	• Cultural heritage must gain visibility and centrality in people's cultural life	• The coexistence of elements from the past with smart design to meet contemporary needs and fully develop communities' capacities.
Intercultural thinking	Aesthetic imperatives	Creative city making
• To create opportunities for dialogical discovery of other heritages	• Physical structures have an aesthetic responsibility to the environment and to the communities	• Cities need to create the conditions for people to think plan and act with imagination.
Invigorated democracy		
• Manifested in the participatory governance of cultural heritage		

Diagram 4: Creative and civic city, implications for heritage

City resilience is related with how risks are identified and properly dealt with in order to mitigate the potential bad consequences of natural or human disasters. Some of the threats are climate change, food emergencies, health, poverty and inequality, security and financial crisis, etc. Apart from dealing

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[25] https://whc.unesco.org/uploads/activities/documents/activity-638-98.pdf
[26] https://composite-indicators.jrc.ec.europa.eu/cultural-creative-cities-monitor/
[27] Environment and Resource Efficiency Policy Brief on Cultural Heritage in urban areas: Sustaining heritage in cities and towns, https://www.interregeurope.eu/fileadmin/user_upload/plp_uploads/policy_briefs/2017-03-02_TO6_Cult_heritage_in_urban_areas.pdf)
[28] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CLT/images/Charles_Landry_Hangzhou_Congress.pdf

with good conditions for the development of human capabilities, resilient places also protect, maintain and enhance their assets[29]. Ecosystems are the natural environment in which city resilience is studied. Heritage is studied as a whole ecosystem that is much richer than the mere addition of cultural heritage elements, e.g. as included in a catalogue or inventory. Actually, cultural heritage risk plans can contribute with good practices that can be transferred and rescaled to other areas of the public administration. Risk plans are important strategic and management tools that are to be developed according to processes as the one that we describe (following ICROM's guidelines[30]) in Diagram 5 (Risk Management Cycle). To better understand how the different phases of the process can be implemented, you can refer, as an example of a national plan, to the *National Plan of Emergencies and Risk Management in Spain[31]*. (For further reading, see ICROM's guide in French[32]).

IDENTIFY

ANALYSE

EVALUATE

TREAT

SUPERVISE

Diagram 5: Risk Managament cycle

Box 4: What is Baukultur?

Baukultur, as an aspect of cultural identity and diversity, holistically embraces every human activity that changes the built environment. This includes every built and designed asset that is embedded in and relates to the natural environment. Baukultur calls for contemporary creation and understands the existing buildings infrastructure and public space (including, but not limited to, monuments of cultural heritage), as a single entity. Thus, Baukultur refers to both detailed construction methods and large-scale transformations and developments, embracing traditional and local building skills as well as innovative techniques[33].

1.7.5 UNIT 5 – CHALLENGES AND OPPORTUNITIES FOR CULTURAL HERITAGE

Cultural heritage preservation and management processes involve high expertise that comes from multiple disciplines. There is a general regulation that defines what can be done and what cannot be done with the elements of material heritage. This sometimes contradicts the operative aspects related to what is feasible technically or economically. The cultural heritage professional needs a good combi-

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[29] https://cityresilienceindex.org/#/
[30] https://www.iccrom.org/publication/guide-de-gestion-des-risques-appliquee-au-patrimoine-culturel
[31] http://www.culturaydeporte.gob.es/planes-nacionales/planes-nacionales/emergencias-y-gestion-riesgos.html
[32] https://www.iccrom.org/publication/guide-de-gestion-des-risques-appliquee-au-patrimoine-culturel
[33] https://davosdeclaration2018.ch

nation of technical and negotiation skills in order to overcome the possible contradicting logic coming from what can be done and what should be done. As a consequence, the cultural heritage manager has to develop transversal skills and has to learn how to contribute to and lead interdisciplinary and cross-disciplinary working processes. (*You will find more information about team management in Module 2*).

Any decision has to be taken in a context of limited resources (financial, human…). There is a relevant financial context that defines the amount of financial resources that can be devoted to any valorisation process, in terms of enhancing and preserving the values associated to cultural heritage. Those resources, no matter if they are public or private, have an infinite number of alternative uses. The economic adagio of "there is no such a thing as free-lunch" implies that the opportunity cost of any decision has to be accounted for. Public funding dedicated to heritage preservation is not dedicated to the promotion of performing arts or health services for the population. Of course, public funding is not the only financial context for heritage. There is direct public funding and there is also indirect public funding, via subsidies and tax-rebates targeted at the private owners of heritage elements or to private donations. The public direct and indirect funding is related to the collective responsibility of societies towards their heritage elements. The whole civic society is responsible for the preservation and valorisation of cultural heritage. (*You will find more information about the opportunity cost in Module 3*)

All those institutional arrangements have to be designed and implemented according to the clear definition of property rights and the legal context that applies in a given member state. The state has a coercive power and can make use of it when the integrity of elements that are considered to be part of the 'national' (community) treasure is at stake. At the same time, there is a consensus that countries should grant the conditions such that there is effective access of everyone to take part in cultural life and to have their heritage respected. It is a responsibility of the cultural heritage planner and of the policy maker to establish the conditions and resources, so heritage is adequately preserved, accessed and transmitted. Last, the legal arrangements depend on the institutional organization of a given country. There are some member states in the EU that are highly decentralized, some of them have created arm-length bodies to administer cultural heritage. Also, private philanthropic organizations are more prevalent in some places, etc. The administrative design is not at all uniform across Europe and that fact determines that there are plural legal contexts.

The physical environment and the socio-economic environment conditions the conservation of heritage, and any integrative vision of heritage conservation has to take into account the system in which the element is located and how it interrelates with different physical and human elements.

The **physical environment** matters, and it could make heritage assets extremely fragile because of external reasons. The integral conservation plans have to carefully consider those conditions and have to foresee the possible risks, assess the likelihood of different contingencies and design feasible and well-funded plans as to mitigate the negative consequences of any negative event. The cultural heritage manager needs skills to work with these complex preventive conservation tools and to negotiate with the agents involved in the planning and management of emergencies.

The **socio-economic environment** determines, among others, crucial aspects as the recognition of cultural elements as part of the collective cultural heritage. According to the 2017 Special Eurobarometer on Cultural Heritage[34], more than seven out of ten respondents live near some form of cultural heritage. Different civic and collective values also determine the attitudes of the local population to the defence and care of their cultural heritage. The level of formal education of the population determines not only attitudes, but also habits and access to cultural heritage, as it determines the participation habits and frequency of use of heritage institutions, museums, archives, monuments… Last, the economic structure of the society in which the heritage element is located is relevant. Cultural tourism is a growing phenomenon all around Europe. This follows general economy trends, where the service sector grows, while agriculture and industry decline. Most of the revenue that is derived from cultural heritage is determined by cultural tourism, being it direct or indirect, as a result of induced effects.

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[34] Special Eurobarometer 466, Cultural Heritage report, December 2017

Box 5. Digital transformation

New technologies offer challenges and opportunities. The digitisation of cultural heritage is not just a conservation strategy. Technology offers innovative tools for the dissemination of cultural heritage assets. It eliminates spatial, physical and intellectual boundaries, bringing it closer to society for its enjoyment and understanding. In this sense, the digital transformation allows generating cultural experiences, the creation of knowledge, conservation, use and reuse of cultural heritage.
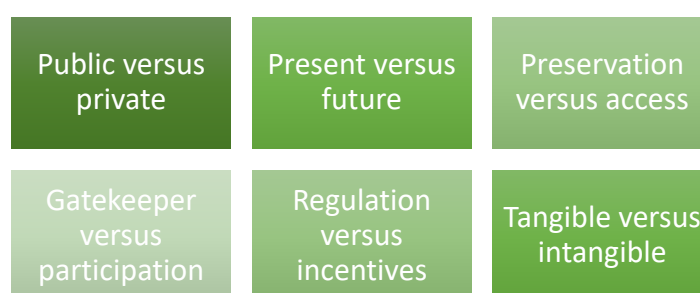
In addition, digitised heritage opens up the potential for broader social, cohesive and economic benefits from sectors such as tourism, education and creative sectors. The digitisation of cultural heritage allows the promotion of citizen participation, promotes total accessibility to it, innovative use and dissemination in other sectors, the improvement of cross-sector and cross-border cooperation and capacity building.

No approach to heritage conservation can be valid without explicit accounting to the specific socio-economic and physical environment of heritage. This is nowadays widely recognized and reflected in integrative visions of the management and care of cultural heritage, such as the HUL (Historic Urban Landscape) approach by UNESCO or Baukultur.

To effectively operate in such a complex and interrelated environment, the cultural heritage manager has to rely on a wide variety of evidence collected from technical aspects of cultural heritage (such as energy efficiency), from legal arrangements (such as the degree of protection and the special plans of urban protection), and from socio-economic outcomes (such as the socio-demographic and economic characterization of the communities and the social and economic activity that takes place in those heritage sites).

The cultural heritage puzzle

As we have seen, cultural heritage is a social construct with changing boundaries. It is related to societal processes of valuation that could be grounded on different values, which derive in individual or collective choices, taken in uncertain and resource-scarce contexts. Preserving and managing cultural heritage implies making difficult choices. In what follows, as conclusion and as a way of offering material for discussion, we present up to six areas of current debate, each of which characterize a potential dichotomy or contra posed interest. Most of them imply alternative (but not so impossible to encompass, sometimes) answers to the questions: who cares, who benefits and who pays for cultural heritage. They are summarized in Diagram 6.

Public versus private	Present versus future	Preservation versus access
Gatekeeper versus participation	Regulation versus incentives	Tangible versus intangible

Diagram 6: The cultural heritage puzzle

Area n.1: Public versus private. Why the market is not enough

Unlike many other cultural goods that can be efficiently provided and allocated by the markets, cultural heritage shows many of what economists call "market failures". These are arguments for public provision, intervention and incentives. The market functions relatively well for a limited bundle of cultural heritage elements. Think for instance about the market for paintings or some antiquities, where owners of a heritage element meet a number of buyers to undertake transactions where the price (the hammer price in the case of an auction, a typical market structure for this goods) is a reflection of private values. Those markets allocate the asset to the buyer who values the asset most. In that sense, this ex-

ample is not so far from any free market that organizes normal economic life in democratic societies. However, even in this case, there are some limitations.

Being cultural heritage something related to communities and societies, even if private property is allowed, there is a non-material dimension that is in the public realm. As mentioned above, when explaining the relevance of rights and the legal context, aspects such as the right of everyone to take part in cultural life (one of the so-called third generation human rights) or the limits to private ownership are to solve the possible tensions between private ownership and public access in order to grant the preservation, access and transmission of cultural heritage[35].

Area n. 2: Present versus future. Balancing the interests of present and future generations about assets inherited from the past

Cultural heritage is a dynamic construct that changes through time and has an evolving nature. It is inherited from the past. Even from the very recent past, as in the case of industrial heritage. Many generations see how the productive elements that created economic activity and jobs that grounded the material welfare of their families, are afterwards transformed into material elements of the community's collective memory. The choices about what to recognize as cultural heritage, about what to preserve and what not to preserve, are to be taken by each generation considering their present values and available resources. Those choices are often in the last instance taken by politicians influenced by political cycles and not by informed professional advice. Thus, they should be kept accountable for their decisions, to ensure social and economic criteria are taken into consideration. More important in the case of cultural heritage than in any other cultural expenditure or investment, the social and economic preferences of future generations have to be considered, to fully accomplish sustainable development.

Current decisions affect future generations, creating what economists call 'intertemporal externalities', and problems arise when the welfare of future generations is not correctly taken into account in the contemporary decision making process. Future generations should get those cultural resources in a condition that allows them to enjoy at least as many choices as we currently do. This is the principle of sustainability that can be perfectly applied to the cultural heritage realm (*please refer to Unit 5 of this Module for more information*).

Area n. 3: Preservation versus access

Although this was traditionally more important in the case of material heritage, we can see it in every heritage manifestation. Cultural heritage can be very fragile, therefore its material preservation requires that access is limited. Think about the case of prehistoric caves. Visitor's access was reduced or even banned after alarming signs of deterioration that challenged their existence. Even the conservation of intangible manifestations can be endangered if exposed to massive trivialization (think about traditional cuisines, crafts, traditions). However, if no access happens, no valuation process and recognition of values can happen in the community. If the treasures remain hidden and unknown, the elements of cultural heritage are subject to biggest dangers of disappearance.

In the special case of intangible cultural heritage and the 'heritage communities', if traditions are not preserved, re-created and transmitted, there is no access to those elements, threatened to disappear. Digital technologies can help solve the traditional dilemma of preservation versus access. Digital access can sometimes complement or substitute physical access without challenging the material condition of the elements. Moreover, digital access can extend the audiences of cultural heritage institutions. Think about museums, access to collections can take place any time and from any place in the world. Interaction and communication with the elements and with the related heritage communities can also benefit a lot from digital technologies. (*For an overview of participation in heritage please refer to Module 4*). Last, digital technologies have revolutionized the archiving, documentation and preserva-

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[35] An example is the case of the House of Hohenzollern: https://www.dw.com/en/house-of-hohenzollern-struggles-to-make-restitution-claims/a-49646366

tion of digitized versions of cultural assets, no matter if tangible or intangible elements, as is the case of Europeana[36].

The process of recognition (or designation, as a way of formal and legal recognition) is not subject to economistic or market driven criteria. One has to consider long-term benefits and sustainable criteria to understand why preservation and access are positively aligned in this sense. A sustainable development of cultural heritage considers that conservation is for people and communities, not only for developers and tourists.

Area n. 4: Gatekeepers versus participation

Cultural heritage has traditionally been under the care and responsibility of experts, who where in charge of researching its values, preserving its condition and deciding what was to be preserved and how it was to be presented to the public. The importance of the role of experts has just diminished and society has become the central stakeholder, as cultural heritage is inextricably linked to the community that coexists with it and re-creates it. The right of access and participation, recognized as a human right, concerns national and local cultural policy. Still, experts play an important role in the processes of recognition, designation and, in the last instance, provision of the supply of heritage goods. They establish the criteria to choose the elements of heritage, and their choice determines what is preserved (as in archaeological interventions linked to public works), and the optimal condition that balances preservation and access to those goods (as in the case of a museum curator that decides if some element is fragile enough as to prevent its exhibition). The rationale for this prominent role is that they are still to have better information about the quality and about the inherent values of the elements of cultural heritage. The asymmetries of information created the need of public governance, but the turn into participatory approaches brings communities back to the centre of the heritage system.

The participatory governance of cultural heritage is related to human rights, as heritage is considered a shared resource and a common good, being its care a common responsibility for all stakeholders. Therefore, new ways of governance emerge and are being promoted by European institutions[37]. The objective is to actively engage all local stakeholders and actors in open, participatory and effective decision-making processes. This would, ultimately, contribute to the development of cultural capabilities and contribute to more democratic European societies[38]. (*For more about participation please refer to Module 4*).

Area n. 5: Regulation versus incentives. Alternative institutional designs to effectively protect CH

Public governance also sets the regulation framework. The institutional design and the mechanisms of protection set a legal framework of rights, responsibilities and duties, and incentives for conservation and dissemination of cultural heritage. Sometimes, a distinction is made between two sorts of interventions, regulation can be done in terms of:

- Hard regulation: what can be done and what cannot be done with designated heritage (exports, material interventions, alterations, demolitions…)

- Soft regulation: the creation of incentives to influence private actors, as with tax incentives.

In any case, management and valorisation of cultural heritage requires the alignment of interests of multiple levels of governance in order to overcome situations in which different interests and approaches could be confronted. An example is the problem created in Spain with the adscription of historic archives to national or regional heritage institutions, on the grounds of whose national heritage those elements belonged to[39].

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[36] https://www.europeana.eu
[37] https://publications.europa.eu/en/publication-detail/-/publication/b8837a15-437c-11e8-a9f4-01aa75ed71a1/language-en
[38] https://www.kcl.ac.uk/cultural/resources/reports/towards-cultural-democracy-2017-kcl.pdf
[39] http://siteresources.worldbank.org/EXTSDNET/Resources/Economics_of_Uniqueness.pdf

Area n. 6: Tangible versus intangible. HUL by UNESCO (2011) as a landmark

Cities are a continuum in time and space, where tangible and intangible elements and different dimensions of cultural heritage are sources of social cohesion, factors of diversity and drivers of creativity, innovation and urban regeneration.

The Faro Convention puts people at the centre of the heritage system. This implies that communities take the lead role in the recognition and protection of their relevant cultural heritage. At the same time, it integrates intangible cultural heritage and identifies the intangible element that is present also in physical and tangible heritage elements.

However, tangible and intangible heritage require different approaches for preservation and safeguarding, which has been one of the main motivations driving the conception and ratification of the 2003 UNESCO Convention for the Safeguarding of the Intangible Cultural Heritage[40]. The Convention stipulates the interdependence between intangible Cultural Heritage, and tangible cultural and natural heritage, and acknowledges the role of intangible Cultural Heritage as a source of cultural diversity and a driver of sustainable development. Recognizing the value of people for the expression and transmission of intangible Cultural Heritage, UNESCO spearheaded the recognition and promotion of living human treasures, 'persons who possess to a very high degree the knowledge and skills required for performing or recreating specific elements of the intangible Cultural Heritage'.

While listing and designation is a common instrument used in the preservation and safeguarding of tangible and intangible heritage, the effective protection of intangible cultural heritage is possible only with the direct involvement of their communities that constantly remember, transmit and re-create the elements that are a relevant part of the collective identity.

1.8 EXERCISES

Here we propose a series of exercises that will help you put into practice the theory presented in the 5 units. These exercises have been designed to be solved individually but can also be discussed in groups. Their purpose is not only to help reflection, but also to put into practice the concepts presented in the theoretical part.
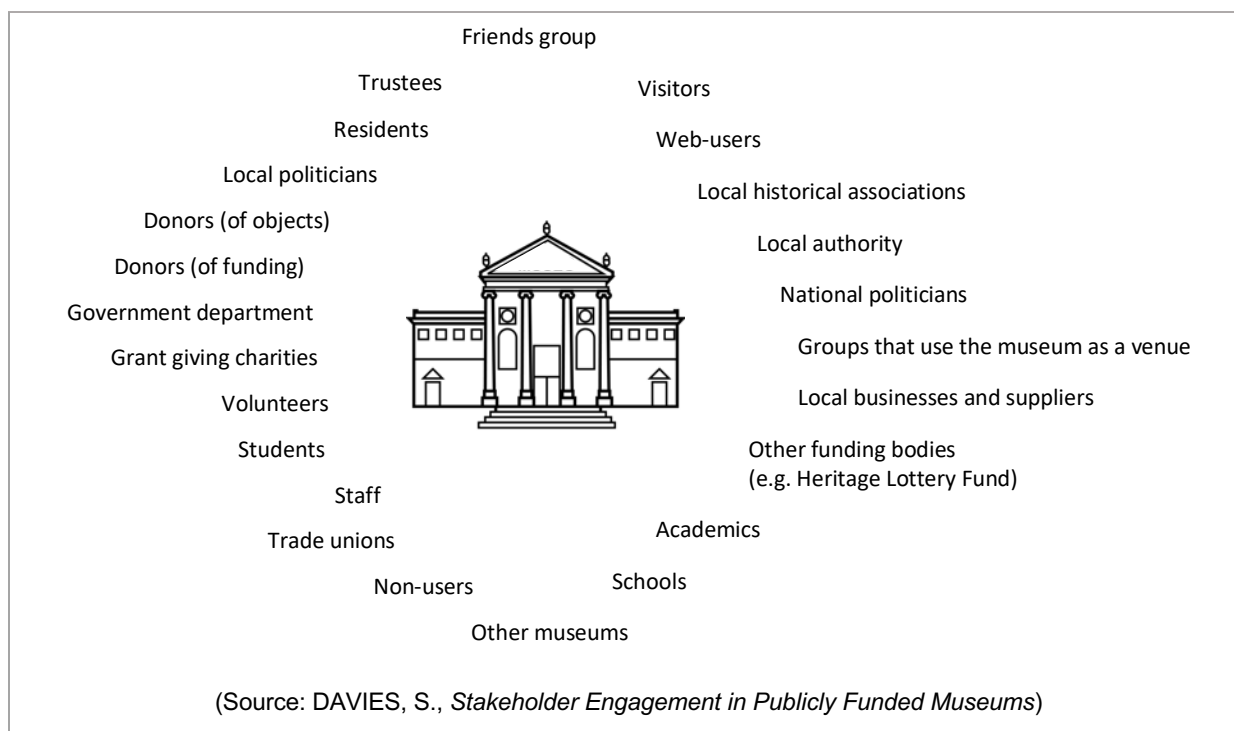
1.8.1 Exercise Unit 1. Identifying the stakeholders

Reflective – Individual/Group – 15 min

As a cultural heritage manager, you are probably in charge or have close relation with a cultural heritage asset in your community. It could be a museum, a historic building, a collection of arts and crafts, a festival of early music, etc. Taking this asset as a use case, please describe which stakeholders are involved, influence or condition its management.

As an example: **potential museum stakeholders**

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[40] https://ich.unesco.org/doc/src/15164-EN.pdf

Friends group

Trustees   Visitors

Residents   Web-users

Local politicians   Local historical associations

Donors (of objects)   Local authority

Donors (of funding)   National politicians

Government department   Groups that use the museum as a venue

Grant giving charities   Local businesses and suppliers

Volunteers   Other funding bodies
(e.g. Heritage Lottery Fund)

Students

Staff   Academics

Trade unions   Schools

Non-users

Other museums

(Source: DAVIES, S., *Stakeholder Engagement in Publicly Funded Museums*)

1.8.2 Exercise Unit 2. Becoming aware of the impacts

Reflective – Individual/Group – 20 min

Choose any cultural heritage asset. It can be the one you manage or any other asset you are familiar with. Following the 10 key findings from the "Cultural Heritage Counts for Europe" project listed in Box 2, identify at least 6 positive impacts that this asset produces for the community. Some examples:

- Does it contribute to enhance the region, to make it more attractive?

- Does it work as a magnet for tourism or for investments?

- Does it stimulate the creation of direct or indirect jobs?

- What other economic activities exist thanks to this cultural asset? (E.g. Restaurants, cafés, libraries, merchandising, activities for children, etc.).

- Does it contribute to improve education in any way? (E.g. Formal, informal, lifelong learning, for adults or for children, in the form of school visits, conferences, publication of books, etc.).

Does it foster the participation of the community? And especially, does it foster the participation of any group of migrants, people with disabilities or people at risk of social exclusion?

1.8.3 Exercises Unit 3. Cultural heritage for sustainability

Reflective – Individual/Group – 15 min

Actively identify, check and reflect on your understanding of the following concepts.
- What is sustainable development?

- What are the three dimensions of sustainability?

- What could you, as a cultural heritage manager, do to contribute to the Sustainable Development Goals? Identify at least three actions you could put in place in your work. With what stakeholders would you have to collaborate to accomplish these actions?

1.8.4 Exercise Unit 4. Cultural heritage and sustainability

Reflective – Individual/Group – 25 min

In the following TED Talk by professor Sarah Kenderdine from the École Polytechnique Fédérale de Lausanne, you will see practical examples of situations that put cultural heritage sites at risk and creative solutions that offer alternative ways of promoting and making them accessible to the public.
Please watch the following video and answer the following questions

How will museums of the future look?
https://www.youtube.com/watch?v=VXhtwFCA_Kc&feature=youtu.be

- What events could jeopardize your cultural heritage asset's sustainability?

- What alternative actions could you put in place to alleviate the negative effects of such events?

1.8.5 Exercise Unit 5. Challenges and opportunities

Reflective – Individual/Group – 30 min

Think about cultural heritage in your community or region. Here we invite you to answer and reflect on the following questions related to the concepts explained in "Unit 5 – Challenges and opportunities for cultural heritage":

- What is the legal context? Are you aware of the legislation related to both the protection and the use of cultural heritage assets in your region?

- To what degree is cultural heritage at risk in your region because of political issues?

- What is the level of income of your community? Are there groups of people at risk of social exclusion?

- What is the education level of your community? What level of receptiveness would you get for cultural heritage education activities? (E.g. Conferences, books, guided tours, etc.).

- What level of tourism influx do you have in your region? Is it a source of income? Is it a threat for the protection of cultural heritage?

How familiar are you with digital technologies applied to cultural heritage? Are you aware of examples in your region where the user experience has been enhanced thanks to technology? (For example using Virtual Reality, Augmented Reality, 360º video or Artificial Intelligence).

1.9 GLOSSARY

Cluster or cluster organization
As defined by the European Cluster Collaboration Platform clusters are "structures or organised groups of independent parties (such as innovative start-ups, small, medium and large enterprises, as well as research and knowledge dissemination organisations, non-for-profit organisations and other related economic actors) designed to stimulate innovative activity by promoting sharing of facilities and exchange of knowledge and expertise and by contributing effectively to knowledge transfer, networking, information dissemination and collaboration among the undertakings and other organisations in the cluster"[41].

Direct jobs
Direct jobs are actual full time positions created by a business or an institution. In cultural heritage related activities, for instance in a museum, direct jobs would be those directly employed by the museum organisation, such as a manager, administrative staff, curators, conservators, building maintenance, guards, etc.

Economic activities
These are actions that involve the production, distribution and consumption of goods and services at all levels within a society. (Source: www.businessdictionary.com).

HUL – Historic Urban Landscape
HUL refers to the recommendation which was adopted on 10 November 2011 by the 36th session of UNESCO's General Conference, and how to apply the Historic Urban Landscape approach in the local context. (Source: https://whc.unesco.org/en/news/1026).

Income
Income is the sum of all the wages, salaries, rents, profits and any other form of earnings received by an individual in a given period of time.

Indirect jobs
Indirect jobs are full time positions from satellite activities made possible by an organisation (a heritage site for instance), but not as a direct output of the organisation itself. In cultural heritage related activities, for instance a medieval castle in a small town, indirect jobs would be those that are created thanks to the presence of the castle in the area. That is, those that would not exist if the town did not have a castle.

Merchandising
The activity of promoting the sale of goods at retail. Merchandising activities may include display techniques, free samples, on-the-spot demonstration, pricing, shelf talkers, special offers, and other point-of-sale methods. (Source: www.businessdictionary.com).

Non-rival consumption
Non-rivalry means that consumption of a good by one person does not reduce the amount available for others. Non-rivalry is one of the key characteristics of a pure public good. Most examples of non-rival goods are intangible. (Source: www.tutor2u.net).

Non-excludable consumption
Non-excludable consumption means that it is impossible to exclude individuals from consumption, for example a public road or a public heritage site. A good is excludable when it is possible to prevent people who have not paid for it from having access to it.

People at risk of social exclusion

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[41] https://www.clustercollaboration.eu/cluster-organisations

These are persons who are either at risk of poverty, or severely materially deprived or living in a household with a very low work intensity. (Source: https://ec.europa.eu/eurostat/).

Start-ups
Start-ups are newly established businesses, companies in the first stages of their operations.

Start-up incubators
A start-up incubator is a collaborative program designed to help new start-ups succeed. Incubators help entrepreneurs solve some of the problems commonly associated with running a start-up by providing workspace, seed funding, mentoring, and training. The purpose of a start-up incubator is to help entrepreneurs grow their business[42].

Sustainable development
Sustainability refers to development that meets the needs of the present generations without compromising the capacity of future generations to meet their own needs.

1.10 The HERITAGE-PRO partners: An interdisciplinary team for skills development in cultural heritage preservation

HERITAGE-PRO is an Erasmus+ **initiative of six European partners from five countries who strive to answer to the continuing call for interdisciplinary training for professionals of different disciplines towards sustainable management and preservation of cultural heritage.**

The HERITAGE-PRO website https://heritage-pro.eu/ provides you with further information and updates. **Please feel invited to browse through the pages and benefit from information and training material alike.**

HERITAGE-PRO is implemented by a partnership of six European institutions, companies and networks from Germany, Spain, Austria, Sweden and Belgium, all active in vocational training for the preservation of cultural heritage. They developed cooperatively this vocational training scheme that closes the gap of interdisciplinary training in the field.

- **Kultur und Arbeit e.V. – Bad Mergentheim / Germany (coordinator)**
  www.kultur-und-arbeit.de

- **Restrade – Höganäs – Sweden**
  www.restrade.se

- **Asociación Española de Gestores de Patrimonio Cultural (AEGPC) – Madrid / Spain**
  www.aegpc.org

- **European Network on Cultural Management and Policy (ENCATC) – Brussels / Belgium**
  www.encatc.org

- **Institut für immobilienwirtschaftliche Forschung (IPRE) –Vienna / Austria**
  www.ipre.at

- **Entwicklungsagentur Rheinland-Pfalz – Mainz / Germany**
  www.ea-rlp.de

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[42] https://www.topmba.com/blog/what-startup-incubator

1.11 ACKNOWLEDGEMENTS

The **HERITAGE-PRO** team is very proud that the following European experts have accepted the invitation in the Advisory Board of the project. They and their institutions are Associated Partners to the project.

More information about their CVs and ambitions can be found here:
https://heritage-pro.eu/about/advisory-board/.

Germany

Mrs **Patricia Alberth**, head of the World Heritage Office of the City of Bamberg.

Mr **Thomas Metz**, director of the General Directorate for Cultural Heritage of Rhineland-Palatinate

Mr **Frank Sprenger**, head of the Centre for Conservation and Monument Conservation of the Koblenz Chamber of Crafts

Mr **Titus Kockel**, PhD, Head of Unit Promotion of the Trades, German Confederation of Skilled Crafts and Small Businesses

France

Ms **Claire Giraud Labalte**, heritage expert, art historian and professor emeritus, member of ENCATC / Alliance 3.3, president of *Le Pôle du patrimoine en Pays de la Loire* and president of the association Territoires imaginaires

Sweden

Ms **Rebecka Nolmard**, director-general, Swedish Ministry of Culture

Mr **Gunnar Almevik**, PhD, Professor at Gothenburg University, Department of Conservation

Spain

Mr **Carlos Romero Moragas**, archaelogist and cultural manager**,** head of the Centre for Training and Dissemination at the Andalusian Institute of Historic Heritage (IAPH) in Sevilla

Mr **Gabriel Morate Martin**, director of the Spanish Historic Heritage Preservation Program at MonteMadrid Foundation**,** member of the Executive Board of Hispanic Nostra and the Spanish Association of the Friends of the Castles (Head of the Technical Department), editor of the "Monumentos Restaurados" Publication Series.

Norway

Dr. Mr Terje M. Nypan, Technical Director at Riksantikvaren (Norwegian Directorate for Cultural Heritage).

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