

**FINAL REPORT //**

**HERIWELL – Cultural Heritage as  
a Source of Societal Well-being in  
European Regions**

Final report // June 2022

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## Abbreviations

AT	Austria
BE	Belgium
BG	Bulgaria
CBA	Cost and benefit analysis
CCI	Cultural and creative industries
CCS	Cultural and creative sectors
CH	Cultural Heritage
CoE	Council of Europe
CPA	Cluster principal component analysis
CY	Cyprus
CZ	Czechia
DCH	Digital cultural heritage
DE	Germany
DG EAC	Directorate-General for Education and Culture
DK	Denmark
EAFRD	European Agricultural and Rural Development Fund
EC	European Commission
ECoC	European Capitals of Culture
EE	Estonia
EGMUS	European Group on Museum Statistics
ERDF	European Regional Development Fund
ESF	European Social Fund
ESIF	European Structural and Investment Funds
ESPN	European Territorial Observatory Network
ESPN	ESPN European Grouping of Territorial Cooperation
EGTC	
EU	European Union
ES	Spain
EU-SILC	European Union Statistics on Income and Living Conditions
ETC	European Territorial Cooperation
FI	Finland
FR	France
GDP	Gross domestic product
GR	Greece
HERIWELL	Short name for the ESPON project 'Cultural Heritage as a Source of Societal Well-being in European Regions'
HR	Croatia
HU	Hungary
ICH	Intangible cultural heritage
ICT	Information, communication and technology
IE	Ireland
IS	Iceland
IT	Italy
JPI	Joint Programming Initiative
LGBTQ	Lesbian, gay, bisexual, transgender and questioning (or queer)
LI	Liechtenstein
LT	Lithuania
LU	Luxembourg
LV	Latvia
Mann	National Archaeological Museum of Naples
MCH	Material cultural heritage
MS	Member States
MT	Malta
NEET	Not in education, employment or training
NL	Netherlands
NO	Norway

NUTS	Nomenclature of Territorial Units for Statistics
OECD	Organisation for Economic Co-operation and Development
OP	Operational programme
PL	Poland
PT	Portugal
RO	Romania
SDGs	Sustainable Development Goals
SE	Sweden
SI	Slovenia
SK	Slovakia
SWB	Societal well-being
TCH	Tangible cultural heritage
TO	Thematic objective
ToC	Theory of change
UCH	UNESCO Cultural Heritage
UIS	UNESCO Institute for Statistics
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UOE	UNESCO OECD Eurostat

# Executive summary

The importance of cultural heritage (CH) in fostering social and economic progress is increasingly acknowledged. However, how to measure the impacts of cultural heritage on individual and societal well-being remains a challenge. There is still the need for structuring a comprehensive methodological framework for the assessment of the role of CH in society.

The HERIWELL project aims to fill in this gap by providing a detailed picture of the contribution of cultural heritage to various aspects of our lives and societies, as well as a structured conceptual framework and a multimethod assessment design. There is also attention to contested and neglected heritage and the Covid-19 effects on delivering and accessing CH resources.

## 1. HERIWELL conceptual framework, definitions and methodology

As underlined in Chapter 1, HERIWELL adopts the Faro Convention (2005) definition of cultural heritage, considering heritage as the ‘cultural capital’ inherited from the past, which people consider as an expression of their evolving values, beliefs, knowledge and traditions. The study considers three strongly interconnected forms of cultural heritage: **tangible, intangible and combined forms of cultural heritage**. Specific attention is also given to **controversial and neglected heritage**, to better grasp the dynamicity of heritage over time, and to reveal its impacts on contemporary societies.

**Well-being encompasses both individual and societal well-being.** In light of the literature examined, the HERIWELL societal well-being definition includes **three main dimensions: quality of life**, focusing on the personal, individual sphere of life; **societal cohesion**, focusing on a more collective dimension; and **material conditions**, focusing on the economic dimension at the individual and community levels.

The HERIWELL conceptual framework on the expected linkages between cultural heritage and the different dimensions of well-being is based on a **Theory of Change (ToC) approach** which starts from the consideration that while the presence of CH endowments could contribute to societal well-being (SWB) levels in a society, their impact on SWB also depends on valorisation interventions.

A **multimethod quantitative and qualitative approach** is adopted to assess the interplay between heritage on societal well-being as conceptualised in the ToC. This is based on the review of the literature, the statistical analysis of available secondary data (including big data), and primary data and information resulting from fieldwork along three main strands of analysis.

**1. Pan-European (macro level) analysis** of the linkages between heritage and societal well-being across ESPON countries and regions, based on different methodologies and sources of data.

- An econometric multivariate analysis of the relation between selected indicators of tangible heritage and societal well-being available from existing official data sources (e.g. Eurostat) and from big data sources such as TripAdvisor and Wikipedia (Chapter 2).
- A descriptive analysis of administrative data on the gender balance in the direction of state-funded museums (Chapter 3) and a content analysis of the UNESCO list of intangible cultural heritage (Chapter 4).
- A quali-quantitative analysis of primary data from a population survey was carried out in eight ESPON countries (Belgium, Czechia, Germany, Ireland, Italy, Norway, Poland and Spain) with 8818 respondents. This identifies individual perceptions of the effects of cultural heritage on well-being and the changes occurred in the use of cultural heritage in the Covid-19 pandemic (Chapter 5). In addition, a stakeholders’ online consultation was carried out by HERIWELL country experts on controversial heritage and its effects on societal well-being (Chapter 6).

**2. Local (micro level) analysis of eight extrapolative case studies** to assess not only the linkages between the various forms of cultural heritage and societal well-being, but also how and why these linkages occur and who benefits most from them. The analysis was based on desk and statistical analyses of documents and data (including big data in the Italian and Czech case studies) available at the local level and interviews with local stakeholders (Chapter 7).

### 3. Assessment of EU investments in cultural heritage in the programming period 2014–2020 and of the relation between EU investments in cultural heritage and societal well-being. The analysis, presented in Chapter 8, includes:

- a mapping of CH-related investments in European Structural Investment Funds (ESIF) and Creative Europe programmes at national and (where possible) regional level, and a correlation analysis between ESIF investments in cultural heritage and societal well-being indicators;
- a qualitative meta-analysis of the ex post evaluations of those European Capitals of Culture (ECoC) capitals including cultural heritage in their investment programme, based on desk analysis and stakeholders' interviews and workshops.

HERIWELL also adopted a **participatory approach**. This integrated the knowledge and expertise of cultural heritage policymakers, stakeholders and experts at all levels of the analysis through a deliberative event, workshops, interviews and focus groups with cultural heritage stakeholders.

The conceptual and multimethod approach allowed the consortium to tackle **three main challenges** arising when assessing the linkages between cultural heritage and societal well-being: i) the individuation of measurable and comparable operational definitions of cultural heritage encompassing all its dimensions; ii) the definition of the relationship between cultural heritage and societal well-being, which is strongly affected by the actions/policies taken to value and valorise heritage and the target audience; iii) the interconnected and bidirectional nature of the relation between cultural heritage and the societal well-being dimensions.

## 2. HERIWELL main findings

The main findings emerging from all the HERIWELL analyses may be summarised as follows.

- There is a strong convergence of results across all the HERIWELL analyses, showing that **cultural heritage, in all its forms, contributes positively and in an interconnected way to all the considered dimensions and sub-dimensions of societal well-being** considered in the study.
- **Cultural heritage contributes particularly to** improving: education and skills; place identity, symbolic representation and community awareness, civic cohesion and sense of belonging; and jobs, earnings and business development. Among the societal cohesion dimensions, the evidence gathered points to an additional sub-dimension to be considered: the restoration of relations in case of heritage-related conflicts (as shown in the Norwegian case study).
- Heritage has an intrinsic value for communities and individuals. However, **its contribution to societal well-being also depends on the valorisation strategies** put in place to unlock its societal well-being potential and make it accessible and accessed by people. **NGOs and informal citizens' groups and movements** have an important role in the engagement and development of communities, in the decentralisation of cultural heritage initiatives, in supporting the access of marginalised categories to cultural heritage.
- The **relation between cultural heritage and societal well-being is bidirectional**. The multivariate pan-European analysis shows that tangible heritage has a greater impact on well-being in those regions with better socio-economic conditions and greater participation and engagement in heritage. Similar evidence of a positive relationship between participation in CH and attitudes or perceptions emerges from the population survey, the case studies and ECoC meta-analysis. These show that high participation in heritage is beneficial not only for individual and community well-being, but also for heritage itself, as it triggers a higher care for cultural heritage and contributes to safeguarding it. For intangible heritage this means preventing practices and traditions from being lost with generational change.
- **What is perceived to be cultural heritage and its symbolic values have deep cultural roots, and therefore are rather different across different national contexts and changes over time**. Many of the ambivalent cases of contested heritage collected by the HERIWELL experts, and the divergent answers given in the population survey, underline the constantly changing nature and interpretation of cultural heritage. This influences the perceptions of the societal benefits and negative effects across countries reported in the survey, especially concerning the societal

cohesion dimension. There are, however, remarkable country similarities on the perceptions of the linkages between CH and well-being, notably the effect of education and gender.

- Cultural heritage **may also have negative effects on well-being**, related to the negative environmental and social effects (as in the case of over-tourism), or to conflicts arising on contested heritage (related to historical burdens or because of political conflicts and human rights concerns), and to neglected heritage.
- The survey results on the perceived impacts of the **Covid-19 pandemic show an overall perception of negative impacts on heritage-related views or behaviour**. This is especially the case for those with high previous involvement in heritage, the highly educated, and in some countries (e.g. Germany, Czech Republic), also for women. However, in some cases it also **increased motivation to engage more in heritage-related activities**: about 20 % – and 30 % in Ireland and Italy – want to see more of the national/regional cultural resources, once the pandemic is under control. Differently from expected, the use of **Internet and social media** for heritage-related information during Covid-19 did not change in a relevant way for around 33 % of respondents. In some countries this happened for nearly 50 % of them (Norway, Germany). This suggests that both digital and ‘traditional’ heritage access strategies should be considered and further developed in the future.

In detail, the analyses at **pan-European level** show the following main results:

- **The multivariate econometric analysis** shows a positive relation between tangible cultural heritage endowments (measured by the share of pre-1919 dwellings over the total) and the subjective perception of well-being (proxied by life satisfaction) at both national and regional levels. Tangible heritage shows a positive effect on life satisfaction and wellbeing in the interaction with public expenditure on culture and good health (an indicator of quality of life). These results are stable over time when considering the two cross-section analyses for 2013 and 2018. The positive impact on societal well-being also emerges at regional level in association with cultural participation.
- **Pilot analyses using TripAdvisor reviews**, confirm the positive influence of tangible cultural heritage (TCH) on the subjective perception of well-being at national and regional levels. TripAdvisor is a promising source to detect the cultural consumption of CH, and the indicators used are positively correlated with tangible heritage endowments. **Wikipedia data** was used experimentally to examine the impact of Covid-19 on cultural heritage demand of two of the most famous heritage sites in Europe, the Colosseum and the Louvre. They show that the pandemic has had a negative effect on virtual cultural consumption. Wikipedia may be a useful data source for monitoring the evolution over time of the potential virtual demand of heritage sites.
- **The content analysis of the 146 UNESCO recognised intangible cultural practices** in ESPON countries reveals that societal cohesion (e.g. community participation, equality, integration) and quality of life (e.g. sense of place, aesthetic satisfaction, educational benefits) are relevant effects in over half of the recognised practices. The potential of intangible cultural heritage to generate valuable and meaningful cultural experiences for visitors and tourists also generates material benefits for specific territories.
- The **population survey** shows that heritage has relevant effects on all the three dimensions of well-being. Education is the most important personal characteristic to explain differences in engagement, and in the intensity of engagement across all surveyed countries. Education is also the factor that explains most about the awareness and concerns about the impact of Covid-19 on the heritage sector. It is the factor that is related to the higher willingness to engage more. The societal cohesion dimension is the one where more differences among countries are found.

The **case studies and ECoc meta-evaluation** provide indications on the **mechanisms that ensure a positive relation occurs**.

- A key factor is **participation or engagement in cultural heritage**. This depends on accessibility, the citizens’ sense of ownership and identification with cultural heritage, and the overall recognition of the value of cultural heritage for individual and societal well-being. There is a **bidirectional relation** between participation in cultural heritage and societal well-being.
- **Cultural heritage narratives** and the way they are framed are also particularly relevant in framing the perceptions on the societal well-being value of cultural heritage.

- The effects of cultural heritage are also favoured by a series of **social mechanisms** described in Chapter 7: emotions, pride, amusement, entertainment, repeated interactions, certification, bandwagon, self-efficacy, performance feedback, financial incentives and salience.

**EU investments in cultural heritage in the 2014–2020 programming period** were consistent, although often difficult to individuate and assess.

- The **ESIF** are the main direct source of EU funding for investments in heritage. According to the ESIF categorisation data, EUR 5.4 billion of European Regional Development Fund (ERDF) 2014–2020 funds were invested up to 2020 in cultural heritage assets and services (2.4 % of total allocated ERDF funds). National data show that actual ERDF investments in heritage are higher, reaching 3% of total ERDF allocated funds (excluding European Territorial Cooperation- ETC projects) for 6595 projects related to cultural heritage. 449 heritage related projects have been funded under the European Social Fund (ESF) for a total of EUR 128 million. An additional EUR 1.14 billion has been invested by ERDF in 1085 heritage related projects under the ETC objective; the European Agricultural Fund for Rural Development (EAFRD) has financed projects in the field of cultural heritage in 19 countries, for a total amount of EUR 8.03 million. The correlation analyses between total planned ESIF allocations in CH and a subset of the SWB indicators available at regional show positive, although low, correlations between CH allocations and SWB indicators.
- In the **Creative Europe Culture** sub-programme, out of the 4451 projects funded in the cultural and creative sectors, 224 were directly related to CH investments. Half related to tangible heritage and the remaining half were equally divided between intangible and mixed heritage. According to a qualitative assessment, out of the selected 224 heritage-related projects, 64 % had a potential positive impact on societal cohesion, 57 % on quality of life and 30 % on material conditions.
- The meta-analysis of **ECoC** evaluation reports on capitals financed in the 2014–2019 period, shows that eight capitals had a specific focus on the promotion, preservation or valorisation of cultural heritage. These were Umeå, Rīga, Mons, Wrocław, Paphos, Valletta, Matera and Plovdiv. In all these capitals, ECoC investments improved accessibility and a higher engagement of citizens in heritage and cultural activities. Heritage activities particularly affected societal cohesion, followed by quality of life and material conditions. The potential of cultural heritage in supporting societal well-being was fostered by the following key factors: continuous funding and equality in accessing funding; the decentralisation of cultural initiatives and use of innovative cultural resources; citizens' engagement, also as co-creators of cultural and heritage activities; long-term, integrated and participatory heritage strategies; and coordination between different levels of governance.

## Cultural heritage and quality of life

**Cultural heritage in all its forms contributes to all dimensions of quality of life.** However, the **intensity of this contribution** varies among quality of life dimensions. A stronger relation is detected between heritage and personal development (in terms of education and skills), contentment, happiness and life satisfaction. A less intense relation is noted with knowledge and research, and quality of the environment.

Cultural heritage acts as a **tool for increasing personal development for both residents and tourists**, as testified by 77 % of the respondents to the HERIWELL survey. Case studies reveal that cultural heritage contributes to increasing both professional (in particular related to traditional practices and to digitisation) and social skills (e.g. creativity, strategic thinking, self-efficacy, empathic communication). The increase in the skills of cultural heritage practitioners contributes to the improvement in the quality of the offer and heritage activities, and the sustainability of the heritage sector.

**Knowledge and research** and **quality of the environment** seem to have a **looser relation with cultural heritage**. This may be due to these dimensions being less considered in valorisation strategies and in evaluations of heritage interventions. Valorisation strategies targeted to these dimensions seem to produce relevant effects, as shown by the Spanish and Norwegian cases. Investments here were targeted to enhancing collective knowledge on heritage, associated with participatory governance in heritage and citizen science.

**Environmental effects are both positive and negative.** On the one hand, cultural heritage institutions can become a driver for sustainable territorial development (as shown by the Podgórze Museum case in Poland presented in Annex VII). On the other hand, ERDF investments in cultural heritage show a positive low correlation with air pollution. This may be related to ‘over-tourism’ in cultural heritage sites and the associated increase in energy consumption and greenhouse gas emissions. Possible negative effects of living close to heritage sites are also related to increasing housing costs and displacement of low-income residents (as in the Valletta ECoC case). There are also cases where the identity of a place is distorted, in high touristic places. The survey points out that the **negative effects** on the quality of life are perceived more by people less engaged in heritage and by young people, and in some countries (Spain) also by women. On the contrary, higher benefits of heritage on quality of life are perceived by residents highly engaged in heritage, women and old people.

## Cultural heritage and societal cohesion

All HERIWELL analyses reveal a strong relation between **cultural heritage and societal cohesion**. **Intangible cultural heritage is particularly relevant in fostering societal cohesion** compared to the other dimensions, as shown in the content analysis of the UNESCO List in Chapter 4.

The case studies and the population survey show that this positive relation is related **to the feeling of pride** generated by cultural heritage. This **contributes, in turn, to both place identity and sense of belonging**. Proudness in cultural heritage has registered the highest level of agreement among respondents to the HERIWELL survey (86%), whatever their level of engagement in heritage. The sense of place identity fostered by cultural heritage is stronger among women and older people than among young people. The case studies reveal that **place identity is also shaped by the capacity of cultural heritage to trigger positive memories and emotions**. However, as underlined by both the analysis of contested heritage and the Weimar case study (Annex VII) **cultural heritage can also trigger contrasting memories**. These may also **impact negatively on place identity**, as in the Nazi and GDR heritage. In shaping cultural heritage narratives, particular attention should therefore be paid to considering both ‘bright and dark’ sides.

**Cultural heritage also contributes extensively to building communities**, as recognised by 81 % of the HERIWELL survey respondents, especially among people engaged in heritage, even moderately, women and older people. Cultural heritage contributes to community-building through **engagement and volunteering**, and **co-creation** (as in the ECoC Plovdiv, Mons and La Valletta cases). It can also **foster social relations among people with different backgrounds**, as in the intergenerational dialogues developed in the Spanish Arquitecturas de la Memoria case, and in ECoC Matera.

HERIWELL analyses also pinpoint the **role of cultural heritage in fostering the social inclusion of vulnerable groups** (such as migrants and people with disabilities). Around 73 % of the survey respondents indicate that learning more about cultural heritage in all its diversity can bring people together and help to respect minorities or migrants. The correlation analysis of ERDF investments also points out a (low) correlation with **lower poverty risks, lower severe deprivation** and lower **inequality** (in terms of lower NEET rate and employment gender gap).

When specifically designed to promote inclusion, **cultural heritage contributes to fostering social inclusion on the ground**. Examples come from the Czech case, with the involvement of seniors from retirement homes and people with disabilities in blueprint activities; the Spanish case where the creation of collective memories through intergenerational dialogue and storytelling fostered solidarity and empathy; the ECoC Umeå where the rediscovery of the heritage of the Sámi minority fostered their inclusion.

Cultural heritage can **also foster societal cohesion by healing past wrongs and reconciling migrants, ethnic minorities and communities**, and **enhancing human rights**. The analysis of contested heritage shows that the potential of cultural heritage to raise awareness about the sometimes hidden collective memory and related conflicts may contribute to the well-being of specific communities. For instance, the Sámi Norwegian case study (see Annex VII) shows that a strong cultural institution can help renegotiate traumatic histories. It can provide a space for the community to speak about traumas and to renegotiate the past; the restitution of the Sámi CH is also considered to be nourishing and healing.

**Cultural heritage** may also promote **gender equality in society**. This happens through making cultural heritage more accessible to women via digitisation (see the Mann case study, Annex VII), embedding

women's performances and representation in culture as in the Umeå case. It can make cultural institutions a driver for gender equality as pointed out by the gender analysis of the directorships of state museums.

**Societal cohesion** can also be **negatively impacted by cultural heritage**, as in the **contested heritage** cases; **conflicts may also originate from unsettled disputes** about tangible, intangible and natural heritage (as in the ECoC case of Umeå). Therefore, particular attention should be paid to support processes of restorative and transitional justice, paying attention to whose heritage is narrated and how, building open and inclusive narratives by actively engaging the whole community.

### Cultural heritage and material conditions

**The positive contribution of cultural heritage to the local economy and in particular to jobs and earnings emerges from all the HERIWELL analyses.**

The statistical analysis based on TripAdvisor data shows that **cultural heritage is positively correlated with the share of employees in cultural and creative sectors** on total employment. A similar result is obtained from the positive correlation resulting between ERDF investments and the employment rate. The majority (81%) of respondents to the HERIWELL survey agree that **cultural heritage-related activities have an important role for the local economy and for creating jobs**. This is especially the case in countries extensively relying on cultural tourism (e.g. Italy and Spain).

The HERIWELL survey and case studies show that **cultural heritage can also contribute to economic development through contemporary creations relying on digitisation**. These incentivise technological development in the cultural heritage sector, which in turn may result in the creation of new jobs and businesses, as shown by Spanish and Italian case studies.

The ECoC cases and the HERIWELL case studies show that the positive effects of heritage on **territorial attractiveness and branding occurs mainly through** the various initiatives, such as:

- the **renovation of heritage sites and places**;
- the **revival of peripheral and neglected areas including heritage sites and places**;
- the **development of new cultural attractors**;
- **improved accessibility**, as in the Wrocław, Rīga and La Valletta cases.

The Irish case points out that **cultural heritage can lead the urban refurbishment process through its embedment in the ordinary planning systems of territories** at all levels. All these elements increase participation in cultural heritage and support the creation of new businesses, with positive effects on the local economies.

However, cultural heritage may also have **negative effects on material conditions**, related again to **congestion, gentrification and rising costs fuelled by 'over-tourism'**. Negative effects in ECoC may also **derive from the adopted narrative of cultural heritage** that shapes the identity of places, when it is mainly aimed at increasing tourism attractiveness (as in the ECoC Umeå case). Particular attention should be paid to this aspect, as the **selected narrative of heritage may have contradictory results**. In other words, it can attract mostly external tourists and ignite social conflicts over heritage deeply rooted in the social structures of a specific place or community.

## 3. Main policy implications

The contribution of cultural heritage to societal well-being is favoured by the **preservation and conservation of cultural heritage, its valorisation and accessibility, and the citizens' active engagement** through co-creation, co-production and co-evaluation processes. Cultural heritage valorisation strategies contribute positively to cultural heritage as long as they are framed in a sustainable way and as long as heritage narratives are open and inclusive. As detailed in the policy recommendations (Chapter 9), the following factors favour the valorisation, accessibility and participation in cultural heritage and should therefore be considered in policymaking.

### 1. Improving the accessibility and participation in cultural heritage

The HERIWELL case studies and the analysis of ECoC investments in cultural heritage point out **several strategies to increase accessibility and participation in heritage**.

- *Targeting heritage opportunities and accessibility to categories of people usually marginalised* (e.g. people with disabilities, women, youth, people living in rural and remote areas and in peripheral or neglected neighbourhoods, people with low levels of education or low income), *also by decentralising* heritage activities in areas close to inhabitants' living and working places or in non-traditional settings (retirement houses, hospitals, peripheral and rural areas, etc.);
- *Digitisation* of cultural heritage to increase young people's interest and participation in cultural heritage, and to allow migrants to engage in their own heritage even if abroad;
- *Improving the aesthetics of heritage buildings and their surroundings, and supporting reception and services facilities enhancing participation in heritage*, also by *making heritage alive*, turning heritage spaces into meeting places;
- *Strengthening the dissemination of information on heritage and opportunities to engage with it*, combining various sources of traditional and social media, and creating information offices in decentralised areas;
- *Paying attention to issues relevant for access to heritage*, such as the transport system and quality of spaces where heritage is located, adequacy of the digital infrastructure and digital skills of heritage staff and citizens (in particular for digital heritage).

## 2. Ensuring an effective governance of cultural heritage

**Multilevel and multisectoral governance** play a key role in enhancing the contribution of cultural heritage to societal well-being. **Cultural heritage impacts transversally on a wide range of well-being dimensions referring to various policy fields** (welfare, education and training, employment, environmental sustainability, social cohesion, economic growth, tourism, etc.), implying the need for coordinating and integrating policy decisions regarding cultural heritage in these areas. A **strong coordination between the different levels of government is also needed** to decide on which forms of heritage to invest in. For the design of integrated strategies, the **acknowledgement of the societal well-being potential of CH** is necessary at both the institutional and community level.

**To ensure citizens' engagement and support to investments in heritage, participatory tools and practices** have to be promoted and embedded within local communities and in public institutions. These practices have to be **open and inclusive** for all citizens and their **results** should be **considered in decision-making**. The effectiveness of participatory practices in cultural heritage depends on the **capacity of public institutions** to steer and implement them. It also depends on the **flexibility of regulatory procedures** in participatory processes to enhance people's capacity of influencing heritage design and delivery.

**Political support is needed for ensuring the sustainability of heritage initiatives**, as well as the **institutionalisation of heritage initiatives** and the **embedment of cultural heritage** within **wider social and territorial development strategies**. This could support the sustainability over time of heritage initiatives and maximise their potential transversal contribution to all well-being dimensions.

## 3. Ensuring adequate human and financial resources

**Continuity and equality in access to public funding** is particularly important to ensure adequate resources. This is especially the case for **small grassroots organisations** that often do not have the capacities to access private market funding or large public funding opportunities. As shown in the Wrocław case, specific funding tools can be created (e.g. micro-grants). **EU-funded investments** can prove particularly useful to this end, and most of the ECoC analysed cases have benefited from substantial ESIF resources, in particular the ERDF. **Increasing attention should be paid to the ESF**, which currently contributes limitedly to cultural heritage; it could support capacity building and the development of heritage-related skills and services. A stronger consideration of the heritage dimension could be mainstreamed in other EU funding schemes, e.g. on digitisation, gender equality, integration of migrants, fighting social exclusion and health.

The availability of **skilled human resources** is crucial for implementing innovative, high-quality and effective cultural heritage strategies. **Stakeholders' capacity** in the cultural heritage and societal well-being fields can be improved through training, mutual and peer learning, exchanges of experience and good practices and creation of knowledge platforms. Capacity-building activities need to also pay attention to strengthening the digital skills of cultural heritage and societal well-being actors, and their capacity to collect data on cultural heritage and implement monitoring and evaluation activities.

#### **4. Improving data collection on CH and the monitoring and evaluation of cultural heritage strategies and initiatives, and their contribution to societal well-being**

To improve data collection and the monitoring and evaluation of cultural heritage policies and their contribution to societal well-being, the following measures should be considered:

- *A common agreed framework should be developed to define both cultural heritage and societal well-being that can improve their measurement across time and countries.*
- *Improvement in data collection on cultural heritage and societal well-being at different NUTS levels through a long-term strategy based on publicly produced and managed CH open data systems. This should be complemented by big data, and building the data collection capacity of cultural heritage actors at all levels.*
- *Improvement in data collected on EU funding of cultural heritage is needed through i) extension of the categorisation system to projects and to other funds besides the ERDF, and ii) provision of data and indicators at NUTS 2 level on the outputs and outcomes of CH-related projects according to a common structure. This should ensure comparability across European countries and regions.*

# Introduction

The societal value of CH has received increasing attention for its potential to foster social and economic progress. However, as underlined by the Cultural Heritage Counts for Europe Report (CHCfE Consortium, 2015), there is still the need for structuring a comprehensive methodological framework for the assessment of the role of CH in society.

The HERIWELL project, carried out for the ESPON EGTC, is part of this wider effort of including the assessment of the societal value of CH in the public policy agenda. The project develops a pan-European and local level territorial analysis of CH impacts, which can be associated with SWB. There is also attention paid to contested and neglected heritage, and to the Covid-19 effects on delivering and accessing CH resources also through digitisation.

The study covers tangible, intangible and combined or mixed forms of cultural heritage and considers their impacts on societal well-being associated with:

- the presence and use of tangible and intangible CH (including participation in related activities);
- the digitisation of CH;
- EU-funded investments and programmes on cultural heritage;
- policies (including participatory ones) adopted to increase the positive impacts of cultural heritage and contrasting its potentially negative effects.

A multimethod quantitative and qualitative approach has been adopted to assess the interplay between heritage on societal well-being, using statistical, administrative and ad hoc survey data, as well as exploring the potentialities of big data (TripAdvisor and Wikipedia).

The report is structured into nine chapters.

Chapter 1 provides a synthesis of the overall conceptual and methodological approach adopted in the study.

The following chapters, from 2 to 6, present the main findings of the analyses conducted at the macro European level. Chapter 2 presents the results of the pan-European quantitative econometric analysis based on available statistical data at national and regional level, experimenting with Trip Advisor and Wikipedia data. Chapters 3 and 4 provide the main findings of the qualitative analyses. Chapter 3 focuses on developments in the gender composition of directors of state museums in a sample of city capitals. Chapter 4 examines the relation between intangible heritage included in the UNESCO lists and the considered dimensions of social well-being. Chapters 5 and 6 show the main results of ad hoc surveys carried out in the project. Chapter 5 presents results of a population survey conducted in eight ESPON countries to analyse individual perceptions of the effects of CH on well-being. Chapter 6 presents results of a survey targeted to CH country experts to map contested or neglected heritage.

Chapter 7 focuses instead on the local level, presenting the main findings of eight case studies carried out in eight ESPON countries. These not only highlight the linkages between the various forms of cultural heritage and the different dimensions of SWB, but also how and why these linkages occur and who benefits the most from them.

Chapter 8 turns to the contribution of selected EU funding programmes in relation to cultural heritage and societal well-being. It focuses on the European Structural and Investment Funds and Creative Europe, as well as the ECoC initiative.

Finally, Chapter 9 provides main policy indications emerging from the evidence and findings of the HERIWELL research activities.

The detailed methodology and results of the analyses are presented in Annexes I–VIII.

# 1 Linkages between cultural heritage and societal well-being: analytical model and methodology

## Key findings

- HERIWELL draws on the definitions provided by the Faro Convention, UNESCO and the Joint Programming Initiative on Cultural Heritage to define CH. It is the cultural capital inherited from the past and created through the interaction between people and places over time, which is community-based and dynamic, reflecting changes in societal values over time. CH includes tangible CH, intangible CH, digital CH and combined/mixed forms of heritage. Furthermore, contested heritage is also considered in the analysis.
- Starting from the international well-being frameworks in HERIWELL, SWB includes both individual subjective well-being and the collective well-being of societies throughout time and across societies. Therefore, SWB includes three main dimensions that consider both individual and collective well-being: quality of life, societal cohesion and material conditions.
- The assessment of SWB impacts of CH is conditioned by two main challenges: the need for operational definitions of both CH and SWB, especially for quantitative measurement, in a context of shortage of data on CH; and the intertwined and heterogeneous nature of SWB impacts of CH.
- HERIWELL adopts a Theory of Change approach to individuate the relevant set of CH and SWB dimensions and their relations. A multimethod design has been defined to grasp the multifaceted nature of CH and SWB impacts.
- HERIWELL experiments with the potential of big data (e.g. TripAdvisor) to complement available data on CH.

## 1.1 HERIWELL analytical model

The exploration of the contribution of CH to SWB requires the disentanglement of several non-trivial issues. The first one is the **definition of cultural heritage and societal well-being**. The second derives from the observation that there are few **encompassing frameworks** considering the **role of CH among the factors contributing to SWB**. The third consists of **disentangling how impacts of CH on SWB occur**. The fourth focuses on **setting into relation these concepts** and deriving a **methodological model** to analyse this relation.

To disentangle these elements, the HERIWELL team relied on the desk analysis of the literature regarding the main concepts of the project, and participatory methods and tools (e.g. the deliberative event<sup>1</sup>, workshops<sup>2</sup>). This allowed for the inclusion of the perspectives of the CH policymakers and stakeholders in the definition of the project concepts and measurement frameworks. Further information on the HERIWELL participatory events is provided in the Annex Outreach activities.

### Definitions of CH and SWB

The **definition of CH** adopted in the study stems from two sources, the first being from the 2005 Council of Europe (CoE) Faro Convention (Faro). The second source is from the contributions that emerged in the HERIWELL deliberative event and workshops with cultural heritage policymakers, stakeholders and CH experts. This definition was then updated on the basis of the evidence gathered on the ground.

In the HERIWELL project, CH is to be considered as the '**cultural capital**', inherited from the past, which people consider as a reflection and expression of their evolving values, beliefs, knowledge and traditions. From this, through the investment of human ingenuity and effort, originates the rich and varied cultures of

<sup>1</sup> A deliberative event consists of 'creating a public space of discussion between different viewpoints, reasons, ideas and interests, in order to take decisions in a constructive and consensual way.' (ENLARGE, 2018, p. 7).

<sup>2</sup> Workshop refers to a meeting in which all participants actively debate, share ideas and elaborate solutions.

modern Europe. Cultural heritage includes all **elements resulting from the interaction over time between people and places**. Cultural heritage is **community-based** and hence **heritage communities play a relevant role** in its framing. Conservation of this cultural capital is essential, both for its intrinsic value and its potential as an investment from which future development – cultural, social and economic – may be generated.

Following the definitions provided by the Joint Programming Initiative on Cultural Heritage (JPI CH) and UNESCO<sup>3</sup>, in HERIWELL CH encompasses **physical items** from the past (**tangible cultural heritage<sup>4</sup> – TCH**), as well as **traditions (intangible cultural heritage<sup>5</sup> – ICH)** considered to be of value for societies or specific communities. Unlike TCH, ICH gains value and can be protected only if practices are still alive. ICH is constantly recreated through the interaction between people and places. If only records of former but now deceased practices exist, e.g. in books or films, the latter could possibly be protected as TCH. More recent categorisations include **digital heritage** ('born' digital or digitised). Moreover, recent debates focus on **contested and neglected heritage**, i.e. characterised by CH-related conflicts, historical burdens or forms of neglect, showing the dynamic and value-based nature of heritage. The HERIWELL deliberative event and analysis of CH interventions on the ground point out that the **above-mentioned categories are intertwined and often operate in conjunction**. Many of the strategies implemented on the ground combine various forms of cultural heritage, so a new category of heritage is considered in the analysis – **combined or mixed forms of heritage**.

While the JPI CH and the UNESCO definitions also include natural heritage, in the HERIWELL definition natural heritage was excluded, as this type of heritage was not considered by the tender. Nevertheless, some of the HERIWELL analysis (e.g. ESIF analysis – ETC) also deal with natural heritage as an inseparable part of the analysed combined or mixed forms of heritage.

The multifaceted and intertwined nature of CH implies the need for the adoption of a multimethodological design (i.e. both qualitative and quantitative) able to unveil how various forms of CH operate together in the production of societal well-being. It also needs a theoretical approach not requiring a 'preferred' method, but allowing for the use of multiple methods and research tools.

When it comes to **SWB**, even though the concept of well-being has been used for a long time, a **commonly agreed definition is still blurry**. Defining SWB is further complicated by the social values embedded in the well-being concept, which are different from one society to another. Nevertheless, the literature and institutions provide general frameworks on what SWB is. In 1948, WHO defined well-being as 'a state of complete physical, mental and social well-being and not the merely absence of disease or infirmity' (Heritage Alliance, 2020, p. 6), while in 2020 it added to this definition saying that well-being is 'influenced by a wide range of biomedical, psychological, social, economic and environmental factors that interconnect across people in differing ways at different times across the life course' (Heritage Alliance, 2020, p. 6). The relation between individual well-being and societal well-being has been widely acknowledged in the literature (Sointu, 2005, De Feo et. al., 2014, New Economics Foundation, 2012). Individual well-being is shaped by social perceptions and practices, and is connected to social norms and values. Thus, societal well-being is both 'a symptom and a cause of all-round optimal functioning at both individual and societal levels' (Heritage Alliance, 2020, p. 6). In this perspective, 'well-being is about individuals and the creation of an enabling environment that can holistically support their physical, mental, emotional, social, cultural, spiritual and economic needs, so that they can achieve their potential' (ICCROM, 2021).

Furthermore, **societal well-being also concerns fundamental rights**, as pointed out by the inclusion of well-being in the Universal Declaration of Human Rights (1948).

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<sup>3</sup> <http://uis.unesco.org/en/glossary>

<sup>4</sup> TCH includes movable objects (e.g. paintings); immovable properties (e.g. architectural works and groups of buildings); cultural landscapes (with strong identity and environmental connotations); sites (e.g. archaeological areas); underwater cultural heritage; industrial heritage.

<sup>5</sup> ICH includes traditional skills of craftsmanship, oral traditions, rituals, games and festivities, and traditional performing arts (e.g. folk dance) as well as the instruments, objects, artefacts and cultural spaces associated with them, which communities, groups and even individuals recognise as part of their heritage.

Table 1.1 is based on Giovannini and Rondinella (2018), and uses the information from the Indicator Framework for Culture in the UNESCO 2030 Agenda (2019). It summarises how different frameworks define the concept of societal well-being and societal progress, how they construct or integrate from individual well-being, and how CH is considered (only in the BES framework) or neglected (in many of the well-being definition frameworks).

**Table 1.1. Well-being in international frameworks**

Stiglitz, Sen and Fitoussi (2009)	VanderWeele (2017)	BES (ISTAT 2017)	OECD (2020)	UNESCO (2019)
1. Material living standards	1. Human flourishing	1. Economic well-being	1. Income and wealth	1. Environment and resilience (SDGs 2, 6, 9, 11, 12, 13, 14, 15 and 16)
2. Health	2. Good relationships	2. Health	2. Work and job quality	2. Prosperity and livelihoods (SDGs 8, 10 and 11)
3. Education	3. Proficient leadership	3. Education and training	3. Housing	3. Knowledge and skills (SDGs 13, 14, 15, 16 and 17)
4. Personal activities	4. Healthy practices	4. Innovation, research and creativity	4. Health	4. Inclusion and participation (SDGs 18, 19, 20, 21 and 22)
5. Political voice and governance	5. Satisfying community	5. Work and life balance	5. Knowledge and skills	
6. Social connections and relationships	6. Strong mission	6. Policy and institutions,	6. Environment quality	
7. Environment		7. Quality of services	7. Subjective well-being	
8. Insecurity		8. Social relations	8. Safety	
		9. Environment	9. Work–life balance	
		10. Landscape and <b>cultural heritage</b>	10. Social connections	
		11. Safety	11. Civic engagement	
		12. Subjective well-being		

Source: HERIWELL Consortium based on Giovannini and Rondinella (2018) and UNESCO (2019)

As noted in Table 1.1, assessing societal well-being means not only analysing ‘how we are doing as individuals, communities and as a nation’, but also ‘how sustainable that is for the future’ ([What Works Centre](#)).

Furthermore, as shown in Table 1.1, well-being definition and measurement frameworks extend from approaches focusing on subjective individual well-being, to overarching frameworks dealing with the well-being of the communities and states. Two main ways to deal with understanding well-being have been developed: on the one hand, subjective measures of well-being focused on what people believe or feel and, on the other hand, the use of a set of objective indicators for measuring SWB. As the former is important, but not sufficient on its own to assess society, the more recent frameworks of understanding well-being combine subjective measures of well-being with objective SWB indicators. In particular, the OECD approach (2020) combining subjective individual well-being with collective well-being, assessed through objective indicators, has shaped the HERIWELL definition of SWB.

Stemming from the OECD approach, the HERIWELL project proposes to adopt a holistic approach to defining and measuring SWB. This will include individual subjective well-being, but going beyond it and looking at the collective well-being of societies throughout time and across societies. Therefore, in HERIWELL **SWB is defined as:**

- **quality of life**, focusing on a more individual perspective on well-being and encompassing the following dimensions: education and skills, including digitisation; health; contentment and eudaimonia; life satisfaction and happiness; quality of the environment.
- **societal cohesion, focusing on a more collective dimension**, which lies at the core of the EU policy, including several societal aspects: community engagement, volunteering and charitable giving; human rights and freedom of expression; equal opportunities and empowerment; place identity and symbolic representation; sense of belonging; integration and inclusion of vulnerable groups (e.g. migrants, minorities, people with disabilities); trust; reconciliation.
- **material conditions, focusing on the economic dimension, related to both the individuals and the community** and including three sub-dimensions: growth and jobs; territorial attractiveness and branding, and property prices and housing.

The HERIWELL participatory events and analyses on the ground have pointed out that **SWB dimensions have to be analysed together**, as there are **mutual relations between individual, collective and economic well-being**.

Another key aspect regards **frameworks for assessing SWB**. For a long time, well-being has been assessed only from an economic point of view, focusing on Gross National Product and Gross Domestic Product. However, for many decades the economic evaluation of societal well-being has been highly criticised. It is claimed to be unable to provide a detailed overview on how benefits of growth influence people's and communities' overall well-being and how these benefits are shared among individual and communities. New frameworks for assessing SWB encompass an overarching understanding of SWB, as mentioned previously in Table 1.1.

Unfortunately, the **great majority of SWB frameworks do not take the cultural heritage sector into consideration** (directly or indirectly). For the HERIWELL project, this **implies developing an ad hoc framework** able to **reply to the ESPON questions taking into consideration all forms of heritage and all forms of SWB**:

- How can the societal impact of cultural heritage be defined? To which societal domains does cultural heritage contribute? How significant is this contribution?
- How do we measure the societal impact of cultural heritage? How do we express it in quantitative terms, considering reliability and validity, at the territorial level?
- What disparities exist between societal impacts of cultural heritage in different types of territories and for different groups of stakeholders (particularly as regards residents, tourists, minorities and migrants)? How do we narrow these disparities?
- How do we compare impacts of cultural heritage across different European regions?
- What are the impacts of EU-funded heritage investments on societal well-being in cities and regions?
- To what extent can the digitisation of cultural heritage and related offers influence well-being in terms of education, knowledge, for example?

### The analytical framework for assessing how CH impacts the SWB

To reconstruct the linkages between CH and SWB, some preliminary considerations are necessary. They imply consideration of whether the presence of CH endowments contributes per se to the maintenance or improvement of SWB levels in a society. Alternatively, or in addition to this first hypothesis, **the possible impact of CH on SWB could also depend on purposive interventions fostered by public or private actors**.

The ESPON HERITAGE project (ESPON, 2019) identifies a value chain that follows the European Commission report on value chains for the cultural and creative industries (De Voldere et al., 2017). According to this, even though the creation of heritage elements happened in the past, the supply of CH starts in the present, with its recognition. CH consumption or demand depends instead on **some kind of access and engagement** (such as living on heritage sites, exploring or visiting them in presence or virtually). In this perspective, **the process needed to complete the CH value chain is not spontaneous, but driven by political and managerial decisions**, making it important to distinguish between CH valuation and valorisation processes.

**Valuation refers to the contemporary recognition of the value of heritage** resources by multiple stakeholders such as experts, historians, public bodies, communities and economic consultants. Valuation is sometimes an informal collective process and is sometimes subject to political processes, such as participatory governance or deliberation, or to administrative designation and regulation decisions. The value recognition exercise can even be performed over lost heritage elements (as resources that have

been materially destroyed or heavily altered)<sup>6</sup>. **Valuation is, therefore, the initial step of a valorisation process** able to unlock the potential of the heritage resources when combined with other human, financial and intangible resources (European Commission, 2010).

In this way, the **valorisation** of CH is a **collective process (Asworth, 2013)** that lets the CH resources deliver current services and guarantee their preservation to pass them to future generations. The forms of this process are many (such as preservation, regulation or management) and depend on the nature of the CH asset considered (Cominelli and Greffe, 2013; Ginzarly et al., 2019). Communities benefit from CH both at the individual level and at the societal level. While the beneficial effects of valorisation programmes are often measured in the **short run**, most of their societal impacts only happen in the **long run**.

**Public strategies and policy documents** on the topic show a general belief that any material intervention on CH will foster beneficial impacts. However, they often miss a crucial step of the CH value chain – **access and participation**. This is because public authorities do not often consider the process towards the creation of SWB when regulating and planning CH policies, as shown by the few evaluations of these policies. However, some efforts have been made to better inform heritage interventions (e.g. Historic England, 2019; Reilly et al., 2019; CHCE Consortium, 2015). Unfortunately, they do not fully develop the impact dimensions into an operational conceptual model useful to perform an impact analysis. The **Social Platform for Holistic Heritage Impact Assessment**, a project funded by Horizon 2020, is also engaged in the elaboration of a holistic impact assessment model (SoPHIA, 2020).

In the absence of a comprehensive evaluation framework in this field, the HERIWELL project adopts a **ToC approach to the above-mentioned concepts of CH and SWB**. The ToC approach has been developed as a methodological tool for evaluating programmes (Weiss, 1995; European Commission 2013). In the context of HERIWELL, the ToC approach is stretched and interpreted as a conceptual tool to shed light on the often-implicit relationships between CH and SWB. In particular, the HERIWELL ToC aims to:

- clarify the hypotheses that link the different variables pertaining to the CH and SWB domains;
- provide evidence to sustain these hypotheses through the HERIWELL analyses;
- provide explanations on why some relevant outcomes derive from specific policy configurations (based on the review of HERIWELL case studies and analysis of ECoC investments in cultural heritage).

Figure 1.1 presents the HERIWELL ToC. The hypotheses articulated in the HERIWELL ToC based on the review of the literature on CH and SWB and consultation with stakeholders are:

- CH influences SWB through specific strategies addressing heritage regulation, preservation and conservation, valorisation, accessibility and participation.
- Accessibility of CH is a forerunner to participation in it.
- CH impacts transversally on both the individual and collective dimensions of SWB: i.e. quality of life, societal cohesion and material conditions.
- SWB dimensions impacted by CH are intertwined.
- Intervening factors can condition the impact of cultural heritage on societal well-being (e.g. historical and economic events, crises).

The HERIWELL analyses confirmed these hypotheses and further enriched them. In addition to the above-mentioned aspects, the HERIWELL analyses show that:

- CH can impact on societal cohesion through fostering reconciliation of community relations.

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<sup>6</sup> It is frequently translated into monetary terms. However, the public and common characteristics of many of the elements of tangible cultural heritage assets, plus the non-material nature of intangible heritage assets makes it difficult. In many instances, there is not a market where these goods are traded and there are no market prices able to represent preferences and valuations. Non-market valuation techniques, as in natural heritage and environmental resources, have been proposed on this respect (Snowball, 2013).

- The impact of CH on SWB is strongly influenced by active participation in CH. There is in fact a bidirectional relation between CH and SWB.
- The SWB outcomes of CH are intertwined, i.e. there is a mutual relation between SWB dimensions and sub-dimensions:
  - Education and skills, including digital skills and digitisation, impact on contentment and life satisfaction and happiness as acquisition/enhancement of skills/knowledge enhances self-efficacy that creates a well-being state.
  - Education and skills impact on material conditions, in particular jobs, earnings and business development. The acquisition and strengthening of skills and capacities through cultural heritage enhances employment opportunities and the creation of new businesses or strengthening existing businesses.
  - Education and skills also influence societal cohesion, in particular place identity and sense of belonging. Enhanced knowledge on common history and traditions increases identification with a certain social group or place.
  - Life satisfaction and happiness is influenced by both material conditions and societal cohesion, in particular social inclusion, as well as by the quality and sustainability of the environment (i.e. individual well-being also depends upon collective well-being).
  - There is a mutual relation between place identity, community engagement, volunteering and charitable giving, and societal well-being. Identification with a place enhances the sense of belonging, while the sense of belonging to a certain community favours place identity. A higher place of identity and sense of belonging results in stronger community engagement, but a higher community engagement also produces a stronger sense of belonging to a place or community.
  - Territorial attractiveness and branding can influence both property prices (i.e. increase in prices) and jobs and earnings (increase in the number of businesses and jobs).
- Participation in cultural heritage as well as societal well-being dimensions are triggered by specific social mechanisms (e.g. emotions, pride, entertainment, amusement, self-efficacy).

**Figure 1.1. HERIWELL Theory of Change**



Source: HERIWELL Consortium

Further details on the conceptual framework of the HERIWELL analytical model are provided in Annex I.

## 1.2 HERIWELL multimethod approach

The proposed methodological approach moves on from the ToC conceptual approach illustrated above.

The HERIWELL Consortium adopts a multimethod design to assess the contribution of CH to SWB, as illustrated in table 1.2.

The multimethod design proposed by HERIWELL combines **qualitative and quantitative analyses** of the contribution of CH to SWB at:

- **pan-European level**, through an econometric analysis of TCH based on available Eurostat and OECD data, as well as on big data (TripAdvisor and Wikipedia), a population survey in eight countries, a stakeholders' survey on contested heritage, a content analysis of UNESCO ICH list and a desk analysis of the gender composition of state-funded museums based on administrative data.
- **local level** through explorative case studies based on statistical analysis of available national/local data and interviews to stakeholders.

Furthermore, HEIWELL uses qualitative (desk analysis, workshops and semi-structured interviews) and quantitative analysis (i.e. descriptive statistical analysis, correlation analysis) to **map and analyse the linkages between CH and SWB in European funds and programmes** (i.e. ESIF, Creative Europe and European Capitals of Culture).

The proposed multimethod approach also explores **new dimensions of CH** (e.g. contested heritage) and **new types of data**, such as

- big data (Wikipedia and TripAdvisor data in the pan-European quantitative analysis);
- administrative data (i.e. the *International Directory of Arts*, the UNESCO list of intangible heritage and the ESIF funding based on EU and national datasets);
- ad hoc survey data.

Table 1.2 provides an overview of the HERIWELL multimethod design. More details on the methods and tools adopted by the HERIWELL team are detailed in each chapter. In addition, details on the background of the multimethod design are included in Annex I.

**Table 1.2. The HERIWELL multimethodological design in summary**

Type of heritage	Aims	Methodology	Level of analysis
TANGIBLE HERITAGE	Assess the relation between tangible heritage and societal well-being in ESPON regions	<b>Pan-European aggregated quantitative methodology</b> (i.e. cluster and principal component analysis, regression analysis, big data analysis) at NUTS1 and NUTS2 levels	GLOBAL LEVEL
	Analyse the gender gap in management positions in state funded museums in a sample of European capitals	<b>Qualitative desk analysis</b> of 188 <b>state funded museums</b> in a sample of 13 capital cities	
	Investigate the impacts and the mechanisms linking tangible cultural heritage and societal well-being at the local level and derive policy indications	<b>Case studies</b> based on <b>quali-quantitative methods</b>	LOCAL LEVEL
INTANGIBLE HERITAGE	Investigate the relation between intangible heritage and societal well-being in ESPON countries	<b>Content desk analysis</b> of the 146 <b>UNESCO intangible heritage nominations</b> available for 26 ESPON countries	GLOBAL LEVEL
	Investigate the impacts and the mechanisms linking intangible cultural heritage and societal well-being at the local level and derive learning for policymakers	<b>Case studies</b> based on <b>quali-quantitative methods</b>	LOCAL LEVEL
MIXED HERITAGE TANGIBLE INTANGIBLE DIGITAL	Investigate individual perceptions on the relation between cultural heritage and societal well-being and on the effects of Covid-19 pandemic on the access and use of cultural heritage	<b>Cross-country population survey in 8 European countries.</b> <b>Quali-Quantitative analysis</b> of survey results	GLOBAL LEVEL
	Analyse the relation between contested/neglected heritage and societal well-being in ESPON countries	<b>Mapping of contested</b> heritage by the HERIWELL country experts and HERIWELL stakeholders	
	Analyse ESIF investments in the programming period 2014-2020 in cultural heritage and their relation to societal well-being indicators	<b>Descriptive statistical analysis</b> of ESIF investments in CH based on EU and national data sources and the use of key-words <b>Correlation and regression analysis</b> of the relation between ESIF investments and societal well-being indicators available at NUTS2 level	
	Analyse the investments in cultural heritage of Creative Europe and, to the extent possible, their relation with societal well-being	<b>Content desk analysis of Creative Europe projects</b> database publicly available online	
	Explore the role of 2014-2020 European Capitals of Culture, and in particular of their heritage investments, in contributing to societal well-being	<b>Qualitative meta-analysis of 8 European Capitals of Culture</b>	LOCAL LEVEL
	Investigate in depth the impacts and the mechanisms linking mixed cultural heritage and societal well-being in ESPON territories, and derive learning for policymakers	<b>Case studies</b> based on <b>quali-quantitative methods</b>	



Source: HERIWELL Consortium

The proposed multimethod approach tackles three main challenges raised in the literature and the deliberative event of the HERIWELL project.

- a) *The development of a measurable and comparable operational definition of CH encompassing all its dimensions* i) commonly accepted by stakeholders; ii) measurable with available data; and iii) comparable across countries and over time.

While the quantitative pan-European analysis is focused on TCH, the qualitative and mixed methodologies will rely on a broader definition of CH. This will either consider all forms of CH (as in the cross-country survey, the case studies and the analysis of EU programmes), or specific subsets (as in the content analysis of ICH, the analysis of contested heritage, and the analysis of gender equality in top positions in state museums and collections).

Regarding the measurement of CH with available and comparable data, other challenges arise, such as the limited availability of comparable data on the size of national heritage in ESPON countries. To address these challenges, the analyses rely on official sources of data (e.g. Eurostat), and big data, ad hoc survey data and administrative data.

- b)** *The definition of SWB and description of the structure of the relationship between cultural heritage and societal well-being, which is strongly affected by the specificity of the actions taken and the target audience*

The SWB definition also takes a broad view, following the literature on the issue as previously detailed in this chapter.

The use of a multimethod approach sheds light on the various dimensions of SWB at different levels (macro – society, and micro – specific groups and individuals) that would be difficult to grasp otherwise. The aggregate quantitative pan-European analysis considers the contribution of TCH to well-being at societal level, measured by proxies based on available indicators, as described in Annex II. The cross-country survey provides information on individual perceptions on the contribution of CH to individual and societal well-being. The extrapolative case studies shed light on micro impacts at territorial level and CH impacts occurring jointly that the statistical analyses at the aggregate level cannot capture in detail. They include the mechanisms that favour or block this contribution. In addition, the multimethod design allows a better understanding of the bidirectional relation between CH and SWB: that CH enhancement measures tend to target specific audiences and, on the other hand, that the selected targets must have the capacity to grasp that impulse.

- c)** *The interconnected nature of the relation between cultural heritage and the societal well-being dimensions represented in the ToC*

The tangled nature of SWB dimensions makes their separate assessment quite difficult. The adoption of a multimethod design allows a triangulation of data from different sources to uncover the CH effects on the SWB sub-dimensions related to quality of life and social cohesion. This was suggested as the focus of the analysis by the stakeholders involved in the deliberative event. In contrast, the effects on material conditions were considered less relevant for the HERIWELL project by stakeholders and have been already analysed in a previous ESPON study (ESPON, 2019).

## 2 Tangible cultural heritage and societal well-being: a pan-European quantitative

### Key findings

- The multivariate and econometric analysis was carried out to estimate the linkage between tangible cultural heritage (TCH) and societal well-being. It shows that heritage endowments (proxied by the share of the dwellings built before 1919 over the total) positively influence the subjective perception of well-being (proxied by life satisfaction) at national and regional levels.
- At national level, the multivariate and the iterative regression analyses show that the main drivers of Life satisfaction/societal well-being are few and belong to the dimensions of Quality of life (Good health), Societal cohesion (Poverty risk, with a negative sign) and cultural participation (Cultural online accessibility). These societal well-being and cultural drivers are stable in the two cross-sections analyses for year 2013 and year 2018 at national level.
- At national level, the regression analysis shows that tangible cultural heritage has a positive effect on LS/SWB in a positive interaction with Good health (Quality of life) and Public expenditure on culture and in a negative interaction with the NEET ratio (Societal cohesion).
- At regional level, the regression analysis shows that tangible cultural heritage has a positive effect on Life satisfaction/Societal well-being in a positive interaction with cultural participation (Cultural online accessibility) and in a negative interaction with Poverty risk (Societal cohesion dimension).
- TripAdvisor reviews, used experimentally to derive a comparable indicator of TCH endowments, confirms the positive influence of TCH on the subjective perception of well-being at national and regional levels in the considered countries (Austria, France, Italy and Spain). TripAdvisor data provide a significant proxy to monitor the contribution of TCH to SWB at NUTS 2 level.
- Wikipedia data, used experimentally to examine the impact of Covid-19 on cultural heritage demand in the cases of the Colosseum and the Louvre, show that the pandemic has had a negative effect on 'virtual' cultural consumption. The use of Wikipedia suggests that this source may be useful for monitoring the evolution over time of the potential virtual demand of heritage sites.

### 2.1 Background

The pan-European quantitative model presented in this chapter explores the impact of TCH on SWB, overcoming two main constraints related to the scant evidence available on this relationship.

The first, illustrated in paragraph 1.1 and synthesised in Table 1.1, derives from the fact that the majority of the definitions of SWB adopted so far do not consider cultural heritage among the determinants of well-being. However, the interplay between well-being and 'culture', differently defined, has been widely explored, starting from the debate on the 'Beyond-GDP' framework (Easterlin, 1974<sup>7</sup>; Stiglitz et al., 2009, 2018).

In recent years, indicators and analyses on well-being are increasingly accompanied by the development of the platform for monitoring the Sustainable Development Goals (SDGs). At the same time, the increased UNESCO's advocacy for a culture-based approach to development resulted in the identification of

<sup>7</sup> The debate on the limits of GDP as a measure of well-being originates from the studies of Easterlin (Easterlin, 1974), showing that economic growth in the USA did not produce substantial improvements in SWB (happiness or life satisfaction). However, rich countries exhibit generally higher levels of SWB than the poorer ones (the Easterlin paradox). The debate of those years identified "more inclusive markers than just GDP growth" indicators (Commission of the European Communities, 2009: 3). A first list of 'more inclusive markers', shared at a supranational level, was developed and tested in 2011 by the OECD in its *Better Life Index*. 'The framework underpinning How's Life? identifies three pillars for understanding and measuring people's well-being: i) material living conditions; ii) quality of life; iii) and sustainability'. This approach 'draws closely on that proposed by Stiglitz et al. (2009)' and other measurement practices tested 'around the world'. Indicators of the cultural sector, explicit or implicit, do not appear either among the pillar indicators or among the 'capital' (endowments) taken into consideration (OECD, 2011): 18.

*Thematic Indicators for Culture*<sup>8</sup>. These indicators are not introduced to define or to evaluate a ‘culturally sustainable development’ (Throsby, 2017). They are introduced to account for the ‘transversal’ role of culture on a variety of SDGs (UNESCO, 2019: 26). The empirical links among culture, SDGs and well-being have been investigated in many studies and econometric models. These show ‘in most cases, a strong positive correlation’ although not without heterogeneity at territorial level and in relation to single SDGs<sup>9</sup>.

However, at country level there are only few studies that have included cultural heritage among the determinants of SWB, using indicators that only partially and indirectly account for TCH’s endowments<sup>10</sup>.

The second constraint is related to the difficulty of defining quantitative indicators of TCH endowments comparable across countries and over time. In many studies ‘culture’ is considered as a ‘relational good’<sup>11</sup>. In some models a broad conceptualisation of culture is adopted, such as spending time with family and friends, participating in groups and associations, and so on (see Bjørnskov et al., 2008; Capecchi et al., 2018). In other models a stricter definition of culture is adopted, e.g. participation in arts and cultural events and the number of visits to heritage sites, libraries or museums. Culture and cultural participation appear to be positively associated with well-being generally, although the disaggregated results show heterogeneity related to gender and age (Rasciute et al., 2017: 572) or economic, social and demographic conditions<sup>12</sup>.

In the literature on well-being and sustainability, most of the studies exploring the drivers of subjective well-being usually rely on data collected from large surveys. These ask respondents to self-report their overall level of happiness and life satisfaction on a numerical scale. However, surveys are considered feeble methods for investigating people’s feelings, because life satisfaction is not the same as happiness, and because different people (even in the same country) may understand the concept of life satisfaction or happiness in different ways (Bertrand and Mullainathan, 2001; Wilkinson, 2007). Other self-reported techniques have been proposed, such as experience sampling or daily reconstruction (Kahneman and Krueger, 2006). Despite these criticisms on survey methods and the indicator of overall life satisfaction (or happiness), its use is widely accepted.

This, albeit partial, review of quantitative models shows that:

- The cultural sector is only partially considered among the determinants of well-being, especially as a ‘relational good’, and the indicators of CH are generally not considered.
- The life satisfaction indicator<sup>13</sup>, is generally assumed as a ‘measure’ of well-being. Indicators detected by surveys specifically designed for this purpose are, for example, the European Union Statistics on Income and Living Conditions (EU-SILC) and, globally, the Gallup World Poll.

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<sup>8</sup> UNESCO (2019: 7). The cultural indicators are of various kinds: economic (from ‘expenditure on heritage’ to ‘culture in GDP’ or ‘cultural employment’); social (from ‘cultural knowledge’ to ‘culture for social cohesion’ or ‘participatory processes’); environmental and infrastructural (from ‘climate adaptation and resilience’ to ‘cultural facilities’ or ‘open space for culture’).

<sup>9</sup> De Neve and Sachs, 2020. This model refers to the concept of ‘human well-being’ a broad concept that includes many aspects of everyday lives (material well-being, relationships with family and friends, emotional and physical health, etc.). The term ‘human well-being’, lacking a universally acceptable definition, is often used interchangeably with other terms such as quality of life, well-living, life satisfaction, happiness and others (McGillivray and Clarke, 2008). Furthermore, in this and in the regional disaggregated models, well-being is generally approximated by the Gallup World Poll which ‘includes measures of positive emotions ... as well as negative emotions’.

<sup>10</sup> For instance, CH indicators are considered among the indicators of Equitable and Sustainable Well-Being in Italy (*Benessere Equo e Sostenibile – BES*, ISTAT 2017) through two indicators: 1) the number (density per 100 square kilometres and weighted by the audience) of museums, archaeological areas and monuments *open to the public*; 2) per capita expenditure for the protection and enhancement of cultural assets and for cultural services.

<sup>11</sup> Relational goods are non-material goods that can only be produced and consumed within groups, and which are intrinsically linked to relationships and interaction. The relational goods ‘are of communicative/affective nature’ (Gui, 2013).

<sup>12</sup> ‘... life satisfaction is more about economics in poor regions and more about ‘culture’ in rich regions’. (Pittau et al., 2010: 358)

<sup>13</sup> Life satisfaction is generally assumed as the indicator of subjective well-being, but the analysis of its determinants is quite differentiated. A subset of studies aims to find individual-level determinants of life satisfaction, while others investigate territorial-specific determinants of satisfaction.

- A wide list of indicators of the cultural sector, and indirectly of CH, usable in quantitative models on well-being, could be those identified in the UNESCO Thematic Indicators for Culture. This should be available in the near future. Although sustainability and well-being are not interchangeable concepts, the correlation between the subjective well-being indicator and SDGs indicators is high.
- The question of which heritage data are suitable to investigate the determinants of life satisfaction is not trivial, especially if the aim is to study the impact of culture measured as heritage endowments and access to cultural participation<sup>14</sup>.

The methodology adopted in HERIWELL and the main results are summarised in the following pages, while a detailed description of the analytical and formalised aspects of the methodology can be found in Annex II.

## 2.2 The methodological approach

Given the mentioned constraints, HERIWELL proceeded to identify and introduce a set of indicators able to measure the effect of TCH endowments on SWB levels. As anticipated in the HERIWELL Theory of Change, the relationship between TCH and SWB is not direct because TCH produces its effects on the different dimensions of SWB (quality of life, societal cohesion, material conditions). Often this is intermediated by and jointly with other factors that affect the cultural heritage sector: for instance, investments in heritage preservation, valorisation and enhancement policies, accessibility and participation. These factors are considered in the quantitative analysis by introducing indicators that account for policies, investments and innovations in cultural production and consumption and refer to the cultural and creative sector (CCS) as defined by Eurostat<sup>15</sup>.

The estimation of the relationship between TCH and SWB involves the definition of specific hypothesis both on the treatment of the multiplicity of indicators related to SWB and TCH. It also involves the measure of the impacts of TCH on SWB.

To reduce these complexities, the following actions have been undertaken:

- 1) We have first analysed the relationships between indicators representative of the multiple dimensions of well-being and SWB at national level, then proceeded to an extension at the regional level. This methodological choice is due to the national level being possible to refer to a much richer number of indicators, homogeneous and comparable (see Tables 2.1 and 2.2 in the next section).
- 2) The most relevant indicators have been identified through specific statistical methodologies, (i.e. the *main drivers*). HERIWELL proposes a well-being definition that includes three main dimensions encompassing individual and societal well-being: quality of life, societal cohesion and material conditions. Each of these dimensions is in turn divided into sub-dimensions that can be approximated through a long list of indicators. The quantitative model, after identifying a potential list, homogeneous and comparable, of these indicators – first, at a national level – proceeds to specify a subset of them (the *main drivers*). These are composed of the indicators that have the greatest impact on the subjective perception of well-being proxied by the overall life satisfaction index (LS and SWB). This subset was identified by analysing the relationship between the indicators, and life satisfaction (LS) and societal well-being (SWB) through multivariate analyses and regressions. The same methodologies were applied to the indicators of CCS introduced, as mentioned above, to eliminate potential ‘background noises’ due to the interdependence between TCH and the activities of CH protection and enhancement.

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<sup>14</sup> Some studies provide harmonised data to arrive to ‘reliable comparisons of happiness across time and space’ (Ortiz-Ospina and Roser, 2013). However, building up a framework suitable to explore in a quantitative way the relationship of TCH and other cultural indicators and well-being is an open challenge.

<sup>15</sup> The TCH restoration and enhancement measures not only make it more accessible, but also modify the ‘stock’ (size) owned by the territories. Together with the change in the quantity of heritage available, the enhancement processes activate other phenomena (greater participation, growth of identity, impact on other cultural and economic activities, etc.) that influence the various dimensions of well-being. To take account of these additional effects, together with the TCH indicators (stock indicator), other cultural indicators have been included which, changing continuously over time, can be defined as ‘flow indicators’.

As detailed in the Figure 2.1, the analyses carried out can be synthesised into the following steps:

#### At national level

**1) identification of the list of indicators** to be used in the quantitative analysis, defining:

**1a)** identification of the indicators, representative of the multiple dimensions of LS/SWB (Quality of life, Societal cohesion, Material conditions) and of the interdependencies between TCH and the Cultural and Creative Sector (CCS). To identify the indicators, the analysis explores the information available from three different platforms on the Eurostat's database: the Sustainable Development Goals (SDGs), cultural statistics and the ad hoc module of the EU-SILC survey that, every 5 years, is devoted to monitoring quality of life (Eurostat, 2018)<sup>16</sup>. As detailed in Table 2.1, the final dataset refers to 31 indicators including an indicator for '**life satisfaction**', considered a proxy of overall SWB. All indicators refer to 2018<sup>17</sup> and 2013.

**1b)** identification of the TCH proxies: i.e. the ratio of pre-1919 dwellings on total dwellings and the share of European Regional Development Fund (ERDF) allocated to cultural heritage.

**2) Selection of the main drivers of LS and SWB**. A multivariate analysis (mainly based on the principal components analysis) and an iterative regression analysis have been jointly used to identify the drivers (most important indicators) of LS from the subset of point 1.

**3) Regression analysis** to measure the impact of TCH (ratio of pre-1919 dwellings and the share of ERDF allocated to cultural heritage) on LS and SWB, which considers the main drivers that characterise the different dimensions of well-being.

#### At regional level

**4) Selection of the indicators available at regional level** from the list of indicators of point 1. Identification of the main drivers of LS and SWB using the same methodology are applied at national level (point 2).

**4a) Identification of the TCH proxy** (ratio of pre-1919 dwellings) at regional level.

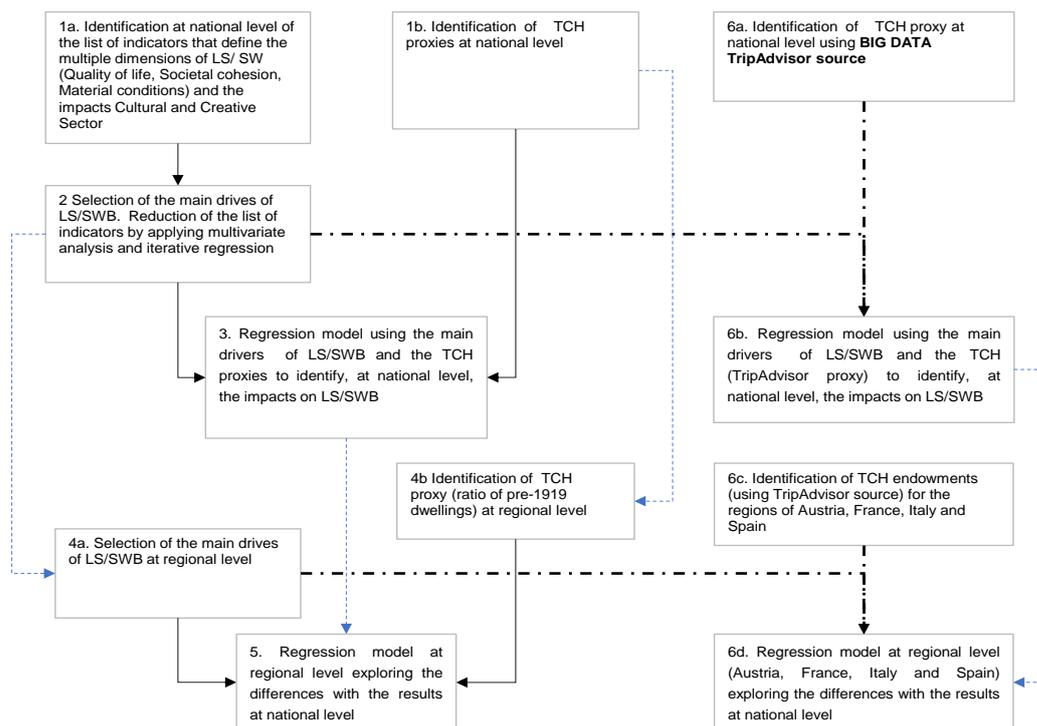
**5) Regression analysis, at regional level**, to measure the impact of TCH on LS and SWB taking into account the main drivers that characterise the different dimensions of well-being at this territorial level. It includes an analysis of similarities and differences with the results of the model applied at national level.

#### Exploring the potentiality of big data

The analyses described in steps 3 and 5 have been reiterated by replacing the indicators used as a proxy for TCH (points 1b and 4b of Figure 2.1), with a new indicator derived from the observed TripAdvisor reviews. This big data source has been applied experimentally both at a national level (points 6a and 6b in Figure 2.1) and on a subset of regions (points 6c and 6d in the same figure).

<sup>16</sup> The analysis at country level involved 31 European countries (EU27, Iceland, Norway, Switzerland, United Kingdom), while the estimation exercise at NUTS 2 level presented in Section 2.5 covers only 84 regions, due to data availability, mainly on life satisfaction.

<sup>17</sup> Two of the indicators used in the model, 'Online purchases, download or accessed from websites or apps: e-book, e-magazines and e-newspapers' and 'Online purchases: film and music, delivered or upgraded online', refer to 2019.

**Figure 2.1. A summary of the methodological approach**

Source: HERIWELL Consortium

## 2.3 The selected indicators

### 2.3.1 SWB dimensions: the indicators

The indicators used for the different dimensions of SWB and their interactions, as well as those for the CCS are presented in Table 2.1.

The selection criteria relate to both the ability of selected indicators to represent the analysed phenomena and the quality and comparability of the data available at the territorial level<sup>18</sup>. It must be underlined that these SWB indicators do not fully capture the different SWB dimensions highlighted in the ToC presented in Chapter 1. For example, many comparable indicators used in the quantitative analysis are based on the EU-SILC source and the definition of 'quality of life' used in the EU-SILC survey. This has a broader meaning than the one adopted in the ToC. Even some of the indicators belonging to the SDG framework have meanings that are not perfectly overlapping with those they assume in SWB, since, despite the strong correlation between the two, the analyses have different aims<sup>19</sup>.

The CCS indicators (e.g. employment in CCS as a share of total employment, or public expenditure on culture) refer to the entire CCS because they are not available with specific reference to the TCH

<sup>18</sup> The many surveys conducted in European countries to measure well-being, often use different definitions and collect different indicators. For these reasons, it is generally difficult to compare and evaluate the information collected at different territorial levels. For this reason, HERIWELL mainly uses the dimensions of the SDGs, whose definition and collection are homogeneously standardised in all countries. According to the results of the EU-funded project MAKSWELL (see [www.makswell.eu](http://www.makswell.eu)), 19 out of the 28 EU countries are currently involved in the construction of a well-being framework (11 of them use the framework for policy analysis). The 27 EU countries are involved in the development of indicators to measure progress towards the SDGs targets (21 of them use these indicators for policy analysis).

<sup>19</sup> The indicators selected in the quantitative model are expected to cover the main socio-economic drivers according, for example, to the list reported in Bjørnsvik (2008). This includes measures of relative income (GDP per capita, disposable income), level of education (early school leaving, adult participation in learning, tertiary education) and negative impact of poverty or unemployment (poverty risk, employment gap, NEET). This list has been extended to include a measure of public expenditure on R&D.

enhancement processes at territorial level, and these processes generally involve other fields of cultural activity (publishing, digital, etc.)<sup>20</sup>.

**Table 2.1. Dimensions of SWB, indicators and sources at national and regional level**

N	DIMENSIONS	INDICATOR	SOURCE
1	Quality of life	Overall life satisfaction (Rating 0-10; Population age 16 years or over; All educational attainment)	Eurostat-EU-SILC
2		Frequency of being happy: Be satisfy most of time (%; Population age 16 years or over; All educational attainment)	Eurostat-EU-SILC
3		Satisfaction with personal relationships (%; Population age 16 years or over; All educational attainment)	Eurostat-EU-SILC
4		Job satisfaction (Rating 0-10; Population age 16 years or over; All educational attainment)	Eurostat-EU-SILC
5		Good health Percentage; Population age 16 years or over; All educational attainment)	Eurostat-EU-SILC
6		Early school leaving (%; Population: age 18-24)	Eurostat - Labour Force Survey (LFS)
7		Tertiary education (level 5-8) (Percentage; Population age 25-34 years)	Eurostat - Labour Force Survey (LFS)
8		Adult participation in learning (Percentage, Population age 25-64)	Eurostat - Labour Force Survey (LFS)
9		Share of renewable energy in gross final energy consumption by sector (Percentage)	Eurostat - European Statistical System (ESS)
10		Greenhouse gas emissions by source sector (Tonnes per capita)	Eurostat- European Environment Agency (EEA)
11	Societal cohesion	Trust in political system (Rating 0-10; Population age 16 years or over; All educational attainment)	Eurostat-EU-SILC
12		Trust in others (Rating 0-10; Population age 16 years or over; All educational attainment)	Eurostat-EU-SILC
13		Persons having someone to rely on in case of need (%; Population age 16 years or over; All educational attainment)	Eurostat-EU-SILC
14		Poverty risk (Percentage; Total population)	Eurostat-EU-SILC
15		Young people (aged 15-29) neither in employment nor in education and training (NEET rate; Percentage)	Eurostat - Labour Force Survey (LFS)
16	Material conditions	Gender employment gap (difference between the employment rates of men and women aged 20 to 64)	Eurostat - Labour Force Survey (LFS)
17		GDP per capita in PPS (Purchasing power standard)	Eurostat-National Account
18		Public investment in R&D (Percentage of GDP)	Eurostat-National Account
19	Culture Creative Sector	Adjusted gross disposable income of households per capita in PPS (Purchasing power standard)	Eurostat-National Account
20		e Total employment on CCS (Percentage of total employment)	Eurostat - Labour Force Survey (LFS)
21		Share of young employment (age 15-29) on CCS torale employment (Percentage)	Eurostat - Labour Force Survey (LFS)

<sup>20</sup> The consideration of these cultural indicators is in line with the literature and the empirical analyses tested at international level. The selected indicators take into account the differences at the territorial level in a) the weight of the cultural sector in national economies; b) the structure of the culture production processes and the quality of the skills employed; c) the vitality of firms operating in national cultural sectors; d) the relevance of the local cultural sector in the international market; e) the innovations in the forms of cultural consumption; f) the differences in government support to the CCS.

N	DIMENSIONS	INDICATOR	SOURCE
22		Tertiary education (levels 5-8) employment in CCS (Percentage of total Cultural employment)	Eurostat - Labour Force Survey (LFS)
23		Number of enterprise on CCS (Percentage of total enterprises)	Eurostat- Structural Business Statistics (SBS)
24		Persons employed per enterprise (number)	Eurostat- Structural Business Statistics (SBS)
25		Survival rate in 2 years of enterprises operating in libraries, archives, museums	Eurostat- Structural Business Statistics (SBS)
26		Survival rate in 2 years of enterprises operating in specialised design activities	Eurostat- Structural Business Statistics (SBS)
27		Import of cultural activity (Percentage of EU27 - total)	Eurostat-International Trade
28		Export of cultural activity (Percentage of EU27 - total)	Eurostat-International Trade
29		Online purchases, download or acceded from websites or apps: e-book, e-magazines/e-newspapers (Percentage of individuals)	Eurostat-Use of ICT in Households and by Individuals
30		Online purchases: film/music, delivered or upgraded on line (Percentage of individuals)	Eurostat-Use of ICT in Households and by Individuals
31		Public expenditure on culture (Percentage of total expenditure)	Eurostat-National Account

Source: HERIWELL Consortium

### 2.3.2 TCH indicators

As mentioned in the previous paragraph, the identification of comparable indicators at the territorial level for TCH is generally difficult because the objects that compose TCH are selected according to community identity values. Article 2 of the Faro Convention reports that: 'cultural heritage is a group of resources inherited from the past which people identify, independently of ownership, as a reflection and expression of their constantly evolving values, beliefs, knowledge and traditions'. As this identity relationship changes over time and places, the objects that make up the TCH also change<sup>21</sup>.

The indicators used in the econometric model to account for the **size of TCH endowments** at national and regional level are the following:

- The 'historical building stock' approximated by the ratio between the number of dwellings built before 1919 and the total number of dwellings. This indicator has already been used as a proxy for tangible cultural heritage (TCH) in the ESPON HERITAGE project (ESPON, 2019)<sup>22</sup>.
- The share of the European Regional Development Fund (ERDF) allocated to cultural heritage that, even with some limits, approximates an indicator of expenditure on TCH<sup>23</sup>.

<sup>21</sup> The movements and the debate on 'call-out culture' or 'cancel culture' are an expression of how some objects or monuments can lose (or acquire), over time, the connotation of 'cultural heritage'. Section 5.2 of this report is focused on contested heritage.

<sup>22</sup> The ESPON HERITAGE project has proposed another TCH (or MCH) indicator: the 'listed heritage' – the number of objects having heritage value and legally protected in the different countries. This proxy is not considered for two reasons. The first is that the criteria for inclusion in the listed category changes from country to country and therefore, the dimensions are not homogeneous and comparable at territorial level. The second derives from the data only being available for some countries and regions.

<sup>23</sup> See Section 8.1 for a detailed illustration of the ERDF indicator and its limits. An indicator of monetary nature is proposed by UNESCO to approximate CH. It is the indicator relating to Target 11.4: the 'total per capita expenditure on the preservation, protection and conservation of all cultural and natural heritage, by source of funding (public, private), type of heritage (cultural, natural) and level of government (national, regional and local / municipal)'. The Target 11.4 indicator, however, cannot be used because it is only available for a few European countries: Belarus, Finland and Poland for 2019; Portugal, Spain (partially) and Sweden for 2018. (UIS Statistics (unesco.org)).

- A new indicator based on TripAdvisor. Another big data source was also used (Wikipedia online visit) but not with the aim to give a homogeneous and comparable dimension to TCH stocks (see below).

New data are becoming available from different sources including big data (see Baldacci et al., 2016 for a general presentation of the topic) and the use of big data is spreading in cultural sector evaluations.

Indicators derived from two sources of big data are used in the present quantitative analysis.

- TripAdvisor users' reviews<sup>24</sup> are used as a measure of the appreciation that cultural consumers assign to the sites they have visited. For each geographical entity, nation or region, the list of 'things to do' proposed by TripAdvisor users was surveyed. Then, the TripAdvisor web page of each attraction was loaded to obtain the number of reviews of each historical site as classified by this source, for all 31 ESPON countries. (Amusement and theme parks, ancient ruins, architectural buildings, churches and cathedrals, religious sites, castles, points of interest and landmarks, museums, scenic walking areas, etc.).
- The Wikipedia source is used to examine the impact of Covid-19 on cultural heritage. It considers the evolution of queries as a measure of the changes that have occurred in the cultural demand of two of the most famous heritage sites in Europe: the Colosseum and the Louvre<sup>25</sup>. Eurostat considers the queries of the Wikipedia pages as 'as a measure of popularity of the sites or a measure of "cultural consumption" of world heritage'. It also considers the queries as a 'weight'<sup>26</sup> to make the various UNESCO sites comparable to each other (Eurostat, 2017). Starting from this assumption, the changes in the daily queries in the period July 2015–January 2022 are taken as a measure of the impacts of Covid-19 lockdowns on the 'cultural consumption' of the two sites<sup>27</sup>.

## 2.4 Main findings of the econometric analysis at national level

As illustrated in Figure 2.1, the methodology has been tested at national level (steps 1–3) and then applied to the regional level (steps 4–5). A further step was devoted to the exploration of the new indicators calculated from TripAdvisor both at national (6a-6b) and regional level (6c-6d).

The main reason to start with national data relies on the availability of data. At national level it is possible to use data from EU-SILC, which also includes information on quality of life for 2018 and 2013. The analysis at national level allowed an individuation of the main drivers of life satisfaction using the full information set that includes all the indicators on SWB and TCH. The selected drivers were then tested at regional level using the smaller set of indicators available.

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<sup>24</sup> The TripAdvisor website, which emerged in 2004 as an application for the tourism domain, offers a vast set of reviews on travellers' experiences with hotels, restaurants and tourist spots. TripAdvisor is considered one of the most popular sites when tourists plan a trip because millions of them visit the site to arrange their holidays. In the pan-European model, the tourist reviews considered are those focused on sites such as architectural buildings, monuments and statues, churches and cathedrals.

<sup>25</sup> The Colosseum and the Louvre have significant differences but also some aspects in common. They have in common that they are in areas which, inscribed in the UNESCO World Heritage List, are considered among the top-rated tourist attractions in the world. The most significant difference is in the volume of visitors: in 2019 the Louvre was visited by 9.6 million (<https://presse.louvre.fr/96-millions-de-visiteurs-br-au-louvre-en-2019/>) and the Colosseum, the most visited site in Italy, by 7.6 million visitors ([http://www.statistica.beniculturali.it/Visitatori\\_e\\_introiti\\_musei\\_19.htm](http://www.statistica.beniculturali.it/Visitatori_e_introiti_musei_19.htm)). During the lockdown, the two museums were not open to visitors for several days a week equal to approximately 6 months overall.

<sup>26</sup> The greater the virtual demand, the greater the relevance of the site.

<sup>27</sup> Daily queries are analysed considering the language and the device employed (national language or English, PC or smartphone) and applying specific statistical tools to detect the different components in the time series (trend, weekly seasonality, noise, etc.).

he identification of the main drivers (point 2 of Figure 2.1,) was performed using, in an integrated way, a multivariate analysis<sup>28</sup>, and a regression analysis based on an iterative approach (see Annex II for details)<sup>29</sup>.

This methodology has been applied on two different cross sections, one for 2013 and one for 2018, years for which the EU-SILC data on quality of life are available.

After identifying the main drivers of SWB, the analysis focused on the impact of the selected TCH indicators on LS and SWB.

#### 2.4.1 The main drivers of overall life satisfaction (LS and SWB)

As mentioned, the main drivers – the indicators subset which better represent the multiple dimensions of well-being and the interdependencies between THC and CCS – were individuated using three quantitative methods, first considering these indicators separately and then together<sup>30</sup>. Details on the results from each methodological step are provided in Annex II, while the main, overall findings are presented here.

#### The main drivers of quality of life, societal cohesion and material conditions on LS and SWB

The results of all the analyses carried out with reference to points 2 and 3 of Figure 2.1 show that the main drivers for LS and SWB are: adjusted gross disposable income of households per capita (material condition), good health (quality of life) and poverty risk (societal cohesion).

**Stylised fact 1:** Adjusted per capita gross disposable households' income and good health are positive drivers of the LS and SWB in 2018, while poverty risk is the main driver with a negative impact on LS and SWB.

#### The main drivers of CCS on LS and SWB

Using the same approach, the main CCS drivers for LS and SWB have been explored, using the subset of indicators drawn from cultural statistics.

Innovations in cultural online accessibility (cultural participation in Eurostat statistics) together with the (relative) economic importance of the cultural and creative sector has a positive impact on LS and SWB, although with some heterogeneity at country level. 'Cultural online accessibility' is strongly related to LS and SWB mainly in the northern countries, while the relative economic importance of CCS characterises Italy and France.

**Stylised fact 2:** Cultural online accessibility, approximated by the online purchase of books, is the main driver of LS and SWB among CCS indicators.

#### The main drivers of LS and SWB considering all indicators

In the sections above, the indicators most significantly correlated with LS and SWB (the main drivers) have been identified, first considering the set of SWB indicators and then those extracted from cultural statistics. In this section, the results obtained by considering all the 30 indicators together are presented.

The **correlation** between all the indicators largely confirms the results of the previous analyses. The main drivers of the subjective SWB cover all the three dimensions of SWB individuated in the HERIWELL ToC.

<sup>28</sup> Principal components are run together with cluster analysis. For details in the methodology see Annex 1.

<sup>29</sup> Running this procedure, it must be remembered that, as reported by Hendry (2005) 'all statistics for selecting models and evaluating their specifications have interdependent distributions, which are different under null and alternative, and altered by every modelling decision'. In other words, the selection of the drivers depends on the size of the database; therefore, the main drivers resulting from the analysis of all the indicators may not match the sum of those resulting from the studies conducted on the different subsets.

<sup>30</sup> The multi-step analysis helps to identify which are the indicators that best interpret the various dimensions of SWB hypothesised by the ToC and together, which are the CCS indicators that intervene in the relationship between TCH and SWB.

These indicators are good health, adult participation in learning, and satisfaction with personal relationships (all indicators of the quality of life dimension of SWB); trust in political system and (negatively) poverty risk (indicators used to account for the societal cohesion dimension of SWB); GDP per capita and adjusted gross disposable income of households per capita (indicator of the material conditions dimension of SWB). Cultural indicators are correlated with the LS and SWB mainly through the ‘cultural online accessibility’ indicators.

The **principal component analysis** extends the positive association between LS and SWB, and indicators of material conditions (GDP per capita, and adjusted gross disposable income of households per capita) and indicators of cultural participation (online accessibility). This set of indicators especially characterises the northern countries, while the lower socio-economic conditions which still characterise, for example, Italy, are in part mitigated by the economic importance of cultural activities on international markets (import and export of cultural goods).

The **regression analysis** shows that the main drivers of LS and SWB are few and belong to the dimensions of quality of life (good health), societal cohesion (poverty risk, with a negative sign) and cultural participation (cultural online accessibility).

**Stylised fact 3:** Considering all indicators together, cultural online accessibility and good health are the main positive drivers of life satisfaction, while poverty risk is the main negative driver.

### Evolution over time of the SWB and culture flow drivers of LS and SWB: results for 2013 and comparison with 2018 results.

To assess on the stability of the drivers of LS and SWB the described methodology has been applied to 2013 data<sup>31</sup> taking into account that, at the time, there was no information on the online purchase of e-books. The model has been estimated using both the years and a dummy variable to account for differences over time.

**Results of correlation and principal components are in line with those reported for 2018:** both the indicators selected and the intensity of the relationship are in line. The only difference appears with the online purchase of film instead of online purchase of e-books.

**Stylised fact 4:** The main SWB and cultural drivers are stable in the two cross section analyses for 2013 and 2018.

#### 2.4.2 The impact of TCH on LS and SWB

Following the identification of the main drivers of SWB and their importance over time, using the most recent data the analysis focused on the impact of the TCH indicators on LS and SWB.

**TCH approximated by the historical building stock.** The **TCH indicator**, ‘**historical building stock**’, is measured as the ratio between the number of dwellings built before 1919 and the total number of dwellings. It was added to the other indicators to identify its role in the relationship with LS and SWB and the other main drivers that, together with TCH, define the relationship with life satisfaction. With the introduction of this new indicator, the main drivers change due to the interdependency of this new indicator with those selected.

Applying the regression analysis to all the indicators, including the TCH indicator, the main drivers positively affecting LS and SWB become **historical buildings (TCH indicator)**; **good health (quality of life indicator)**, and **public expenditure on culture (indicator of culture as a flow)**. The **NEET ratio** (people of age 15–29 not involved in education, employment or training, an indicator of social cohesion) has a negative relationship with the well-being indicator. **One of the most relevant results of this regression analysis is, therefore, the identification of the existence of a positive relationship between TCH and SWB.**

<sup>31</sup> The choice of 2013 was because the indicators on quality of life are available in the European statistical system only every 5 years, being included in an ad hoc module in the EU-SILC survey.

Conversely, using **ERDF expenditure on TCH** in the regression analysis does not produce any significant results, probably due to the limits of this indicator as described above.

**Stylised fact 5:** The TCH indicator historical buildings shows a positive effect on LS and SWB in the interaction with public expenditure on culture and good health (quality of life).

### 2.4.3 The potentiality of big data

**TCH approximated by TripAdvisor indicator.** The indicator derived from TripAdvisor **shows a positive interaction with LS and SWB**. The other drivers are the indicators belonging to the social cohesion dominion (**poverty risk and NEET rate**) with a negative sign and indicators belonging to CCS (**employment in CCS on total employment**) with a positive sign.

A relevant aspect is **the existence of a positive and significant correlation of the indicator based on TripAdvisor with the historical building stock**. This correlation shows there is a positive relationship between a flow indicator, derived from TripAdvisor and, based on the popularity of the TCH among visitors, and a stock indicator such as historical buildings.

**Stylised fact 6:** TripAdvisor is a promising source to detect the cultural consumption of CH, and is positively correlated with TCH endowments.

## 2.5 Main findings of the econometric analysis at NUTS 2 level

Although the European statistical system improved the availability of data at NUTS 2 level, some drawbacks remain especially in relation to the EU-SILC survey indicators<sup>32</sup>.

For the estimation at NUTS 2 level, we could consider only a subset of indicators and 84 regions, due to data availability. The data relating to some of the indicators identified as the main drivers of the SWB were either not available at regional level or available only for some regions (see Table 2.2).

**Table 2.2. Dimensions of SWB, indicators and sources at regional level**

N	DIMENSIONS	INDICATOR	SOURCE
1	Quality of life	Overall life satisfaction (Gallup Well-Being Index)	World Gallup Poll
2		Early school leaving (%; Population: age 18-24)	Eurostat - Labour Force Survey (LFS)
3		Tertiary education (level 5-8) (Percentage; Population age 25-34 years)	Eurostat - Labour Force Survey (LFS)
4		Adult participation in learning (Percentage, Population age 25-64)	Eurostat - Labour Force Survey (LFS)
5	Societal cohesion	Trust in political system (Rating 0-10; Population age 16 years or over; All educational attainment)	Eurostat-EU-SILC
6		Trust in others (Rating 0-10; Population age 16 years or over; All educational attainment)	Eurostat-EU-SILC
7		Poverty risk (Percentage; Total population)	Eurostat-EU-SILC
8	Material conditions	Young people (aged 15-29) neither in employment nor in education and training (NEET rate; Percentage)	Eurostat - Labour Force Survey (LFS)
9		GDP per capita in PPS (Purchasing power standard)	Eurostat-National Account
10	Culture e Creative Sector	Employment on CCS (Percentage of Total employment in CCS on Total employment )	Eurostat - Labour Force Survey (LFS)

Source: HERIWELL Consortium

<sup>32</sup> At the same time, the indicators related to the European social progress index does not appear as a useful tool for the analysis as pointed out by the participants in the methodological seminar in September 2021.

In some cases, a switch to a similar indicator has been required such as for life satisfaction, available only at national level using the EU-SILC survey. This has been replaced by a similar indicator provided by OECD using information from the Gallup survey<sup>33</sup>. It was instead possible to use the same three TCH indicators considered for the national level analysis: historical buildings, ERDF allocations on CH and TripAdvisor reviews.

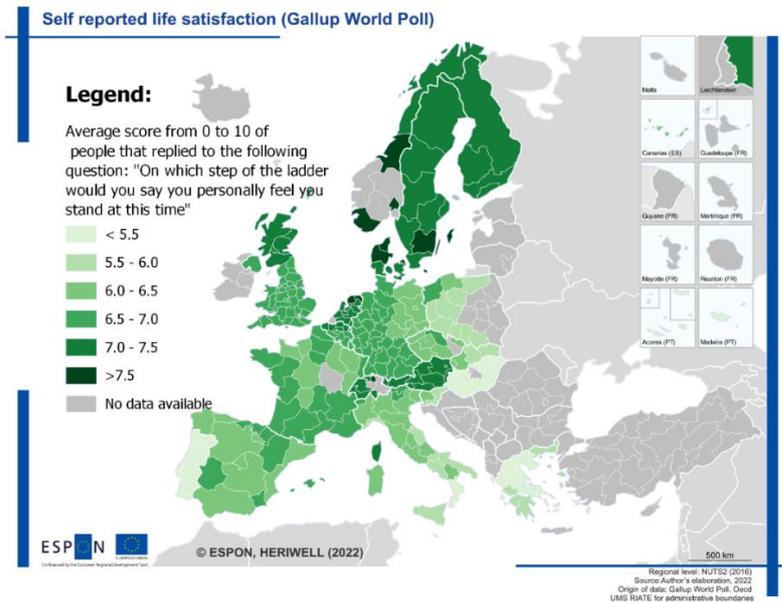
The **principal component analysis** confirms the correlation analysis providing further details of the relationship at NUTS 2 level. The historical buildings indicator is more important in some regions, as for example Navarra where the identity element is strong, than in other regions, such as Midi-Pyrénées, where SWB is more related with adult participation in learning (levels of education) and e-book purchase (possibility Internet access).

The **regression model** applied at NUTS 2 used the same equations considered at the national level. The regression equation used to determine the indicators that significantly affect the LS and SWB variable shows a negative impact of poverty risk (social cohesion dimension). It shows a **positive impact on SWB of both the historical building stock as a proxy of TCH and cultural participation (online purchase of books)**.

**TCH approximated by the ERDF fund** does not provide a significant contribution in identifying the impact of TCH on LS and SWB. This result is likely due to data limitations, as information on the allocation of ERDF funds on CH at NUTS 2 level shows most of the values near zero.

The following maps illustrate the distribution of the main indicators considered for the analysis at regional level. The distribution of LS and SWB across the available European regions in Map 2.1 shows higher values of life satisfaction for the northern countries, and for Austria, the Netherlands and, with lower intensity, France. This evidence appears in line with the distribution of the participation rate in education and training (Map 2.2) and partly with the employment in CCS (Map 2.3), that shows a more homogenous distribution across the regions. The distribution under historical buildings shows higher values in France and Italy (Map 2.4). The details on the correlation and the principal components, presented in the Annex II, return more evidence on the similarity in the distribution pattern across the indicators.

### Map 2.1. Life satisfaction at regional level

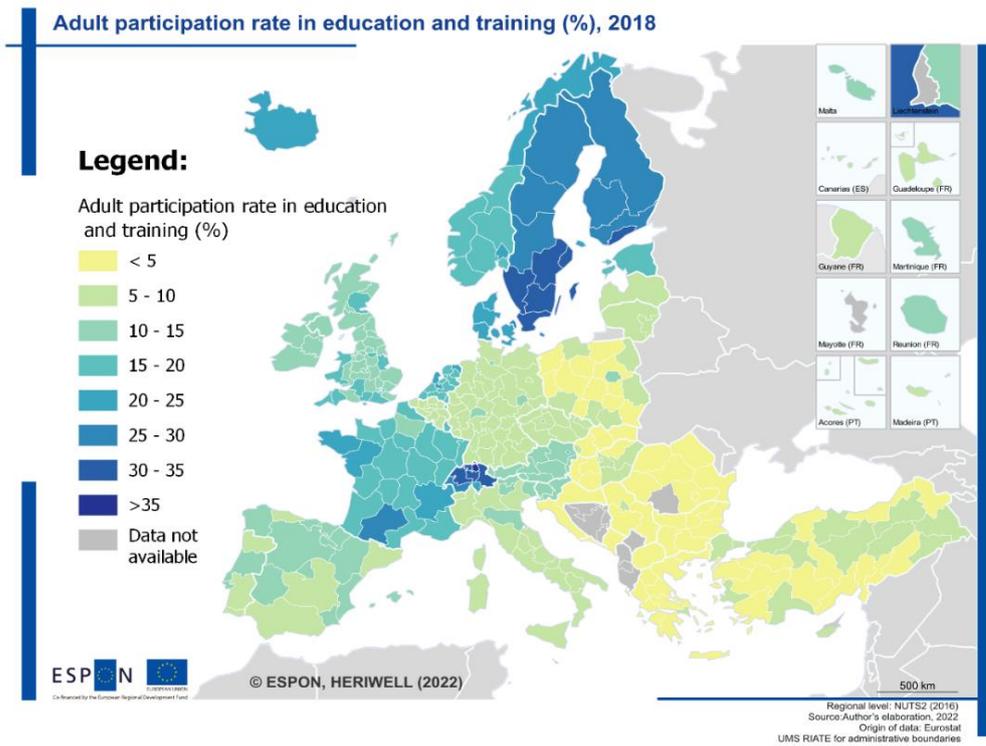


Source: HERIWELL Consortium on Gallup World Poll data

Note: Data for per BE, DE and UK are available only at NUTS 1 level

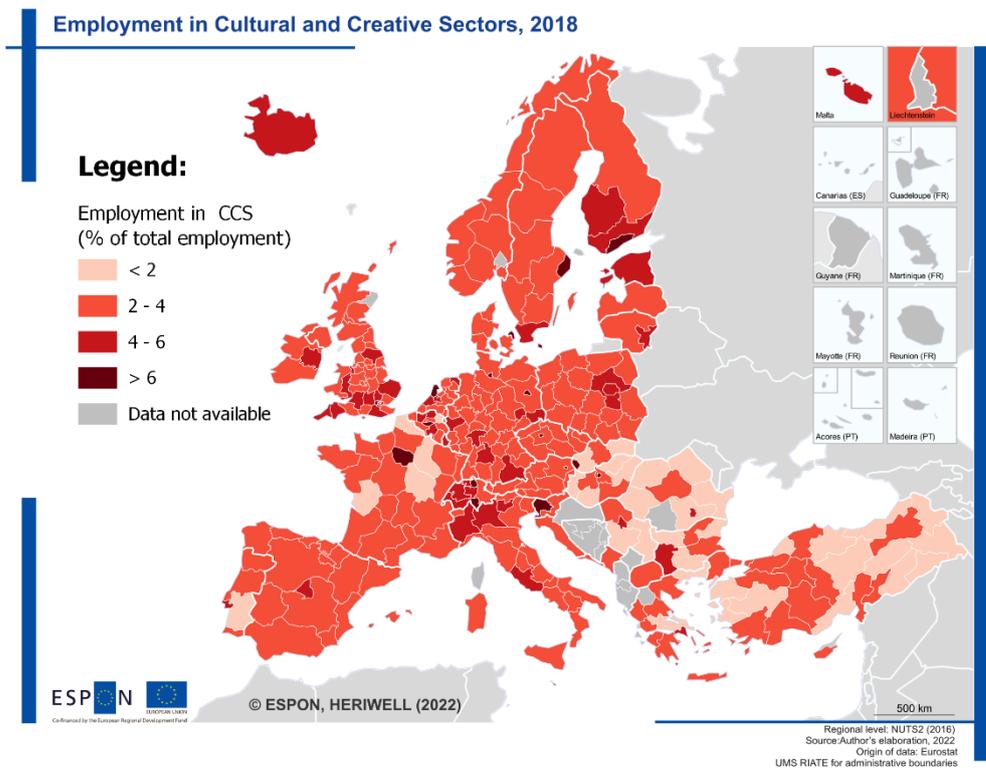
<sup>33</sup> The *World Happiness Report* which 'measures life satisfaction ratings and emotional well-being, and captures the important context that GDP does not explain how people feel about their lives and what's happening in them'. [Explore the Gallup Global Happiness Center | Gallup](#)

### Map 2.2. Adult participation rate in education and training (%) – 2018



Source: HERIWELL Consortium

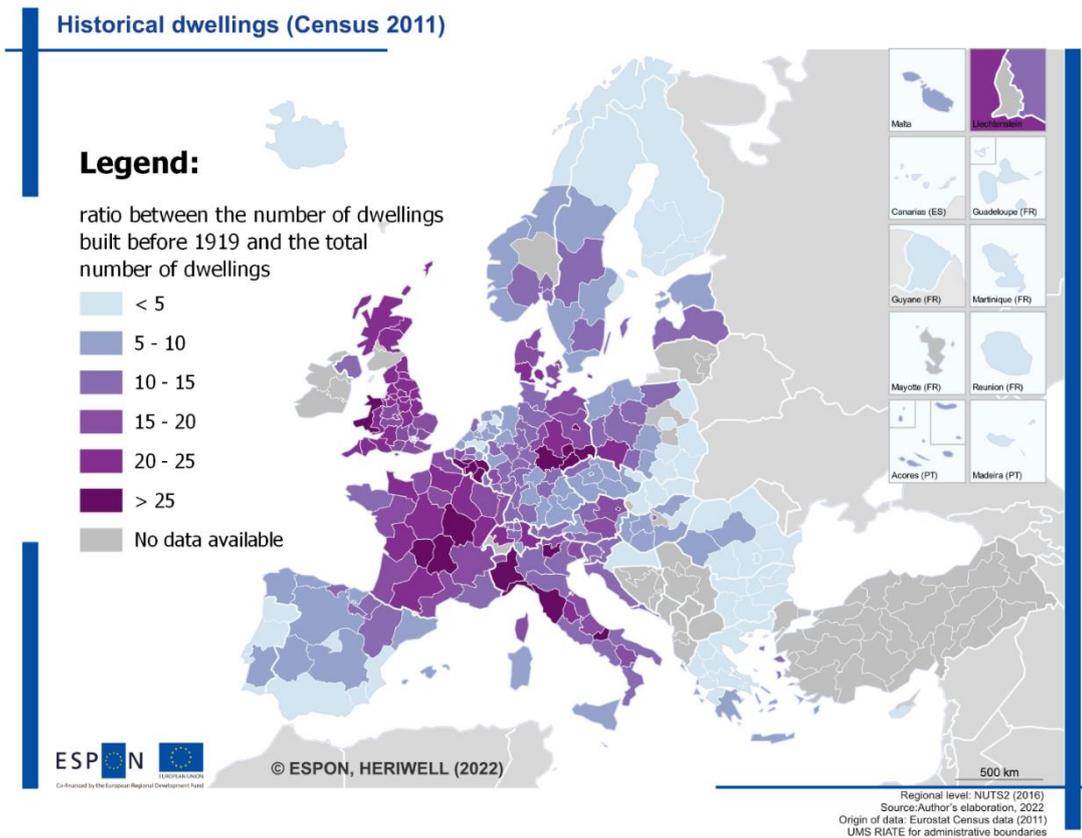
### Map 2.3. Employment rate in cultural and creative sectors (%) – 2018



Source: HERIWELL Consortium

Note: Data for per ES and PL are available only at NUTS 1 level

## Map 2.4. Historical dwellings (before 1919) rate – Census 2011



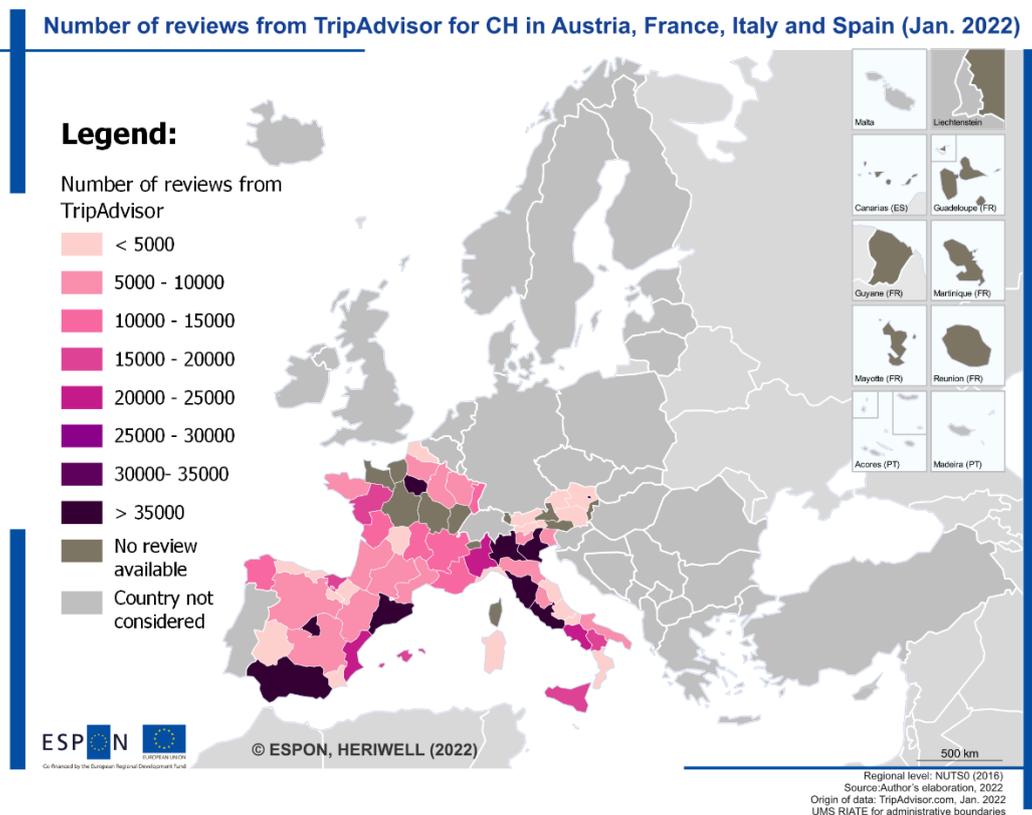
Source: HERIWELL Consortium

**The potentialities of Big-data at NUTS 2.** The potentiality of the TripAdvisor source has also been explored at NUTS 2 level, considering the regions of Austria, France, Italy and Spain. For each region, the same set of information used for the analysis at national level was collected<sup>34</sup>, with more than 2100 historical buildings (e.g. churches, castles, palaces). As for the analysis at national level, the distribution at regional level shows a high degree of asymmetry that has been addressed by dropping the most remarkable cultural sites. As a final result, we have obtained an **indicator that should approximate the use and perception of CH at regional level in the four considered countries**. This indicator has been included in the database of all regional indicators that now refers to 59 regions. Map 2.5 illustrates how the total number of reviews is distributed across the regions for the selected four countries.

- As for the country level, the use of the **Trip Advisor indicator implies a lower degree of correlation with the other SWB indicators**, due to the specific characteristic of the TripAdvisor source. However, a positive correlation is noted with the indicator on employment in CCS.

<sup>34</sup> This selection, which is very expensive in terms of computing time, has returned with more than 4100 elementary rows containing the details of the locations addressed.

### Map 2.5. Number of reviews for CH in TripAdvisor in at regional level in Austria, France, Italy and Spain– January 2022



Source: HERIWELL Consortium

**The regional TripAdvisor indicator shows a positive relationship both with LS and SWB. This also applies to tertiary education, adult participation in learning (quality of life dimension), e-book purchases (cultural participation) and gross disposable income of households (material conditions), which are the main drivers of life satisfaction.**

**Stylised fact 7:** The TripAdvisor regional indicator for TCH, the education level and cultural participation are positively correlated with LS and SWB also at the regional level.

**Stylised fact 8:** The use of the TripAdvisor indicator at NUTS 2 level confirms the usefulness of this big data source to monitor the contribution of TCH to SWB at regional level.

**Wikipedia daily data** can also provide useful information on the demand for TCH. HERIWELL has analysed these data for the period July 2015–January 2022 to:

- explore whether this source might be useful to monitor the impacts of the outbreak of the Covid-19 pandemic in terms of the evolution of the potential demand;
- assess the difference of the magnitude of the impact across different CH sites, as in the case of the Colosseum and the Louvre, and if the recovery path could be expected to be the same<sup>35</sup>;
- investigate differences on the device and language used for the search.

<sup>35</sup> Specific statistical tools, able to detect the different components in the time series (trend, weekly seasonality, noise, etc.), have been used.

These last distinctions become important if we assume that the differences in the devices utilised (desktop or mobile) respond to different needs of users<sup>36</sup>. The differences in the 'language' used in the query could, instead, help to distinguish the 'origin' of the potential user: national or foreign cultural consumers<sup>37</sup>.

The results of the trend analysis of the Wikipedia data show that:

- during the lockdowns not only did the physical access to and consumption of UNESCO sites decline, but also the virtual versions;
- the pandemic seems to have reshaped the characteristics of the potential visitors in favour of national visitors.

It is worth noting that Wikipedia data are very timely; for example, today we know the number of times the web pages selected yesterday were consulted. This characteristic is a remarkable improvement compared to existing information on CH visitors and data on tourism. However, more details are required to address the pros and cons for translating these data in statistical indicators related to CH. For example, one issue relates to the coherence of this new source with the traditional data on visitors: is the magnitude similar when considering their annual growth rate? Another issue relates to the possibility to integrate Wikipedia with TripAdvisor data. Is the ranking of the most visited CH the same?

All in all, big data are far from the promised land, but we expect that their use will be extremely useful to address CH research and policymaking, especially at local level.

**Stylised fact 9:** Wikipedia is an eligible candidate to measure the evolution of demand for museum and historical sites over time.

## 2.6 Conclusions

As noted at the beginning of the section, there is not a widespread and consolidated research field where the interactions between societal well-being and cultural heritage, tangible and intangible, are currently investigated. Cultural heritage is not properly addressed even in the new framework related to well-being and SDGs.

This implies, in turn, that there is not a common set of indicators able to monitor the evolution of all the dimensions on which CH might impact on SWB. At the same time, the European statistical system (Eurostat and the National Institutes of Statistics) does not have a 'regular' project along with disseminate updating useful to monitor the evolution of this relationship.

The HERIWELL project, in line with the tradition of the ESPON's activity, aims to fill this gap.

A list of feasible indicators has been presented that are important to monitor the impact of CH on SWB. It is important that this set of indicators is regularly updated, improving the availability of indicators at NUTS 2 level. This issue has been pointed out in the discussion with Eurostat, and the current activity on the new EU-SILC survey is going in this direction.

The weakness of the current data on CH has been explored and new evidence drawn from the so-called big data has been proposed. The results obtained with the TCH indicator based on TripAdvisor data, compared to a stock indicator such as historical buildings, helps to identify some characteristics of the relationship between heritage and well-being at NUTS 2 level. When using historical buildings as a proxy of TCH, the impact of heritage on LS and SWB results is stronger in regions where the socio-economic conditions of the local population are generally better; the other main drivers of the regression are generally represented by the indicators belonging to the quality of life and social cohesion domains (e.g. good health or a lower poverty risk rate). When using the TripAdvisor indicator, TCH positively influences LS and SWB

<sup>36</sup> It could be assumed that those who consult Wikipedia to respond to their more general knowledge needs use the desktop, while those who need to obtain a direct support for the actual visit (in progress or planned) make more use of a mobile device.

<sup>37</sup> The national languages (Italian or French) approximate the 'popularity' of the monument for the local communities (i.e. the assumption is that an Italian interrogates Wikipedia in Italian or a French person in French and so on), while the pages consulted in English could approximate the 'popularity' of the heritage for tourists.

with other main drivers belonging more to the domain of material conditions. This result seems to depend on the fact that the tourist use of CHs plays an important role in the TripAdvisor indicator. At the same time, Wikipedia is an eligible candidate to measure the ‘nowcasting’ and ‘forecasting’ of the virtual and potential cultural demand for museum and historical sites over time.

When exploring the relationship between TCH and SWB, the following results allows for a more general interpretation of the empirical regularities, identified both at the national level and at NUTS 2 level:

1. TCH, however measured as stock or flow, positively influences the subjective perception of well-being (LS and SWB) at all territorial levels.
2. Taking into account the other main drivers of life satisfaction, it also appears that TCH has a greater impact in those countries and regions where the economic and social conditions are better in terms of quality of life (e.g. levels of education), societal cohesion (e.g. poverty risk or NEET rate has less weight) and material conditions (e.g. GDP per capita).

These results asks for further research, to pursue the results obtained. As a first step a regular updating of the indicators selected is necessary, together with further exploration of big data to extend the actual set of data and to learn more about their use.

Data improvements ask for an intensive partnership with the principal actors in this domain, mainly Eurostat for the domain of cultural statistics, as well as the UNESCO and the SDGs networks. These actors may support further investigation on the evidence presented. As previously mentioned, there is an information gap – and even more a definitional one – to be filled in relation to the role that CH has both on SWB and, more generally, on the sustainability of development. Together with UNESCO, ESPON can significantly contribute to filling these gaps.

### 3 Cultural heritage institutions as a driver of social change: a focus on gender balance in the leadership of state-funded museums or collections

#### Key findings

- Equal opportunities for female professionals contribute to SWB and are among the main development goals of the UN and the European Union.
- A trend towards an adequate gender balance in the leadership of state-funded cultural museums and collections in selected European capitals can be empirically verified.
- Even if room for improvement still exists in some cases, gender-related recruiting practices of important museums generally outperform many other public institutions and large private companies.

#### 3.1 Background and methodology<sup>38</sup>

The **UN SDGs** are one of the potential benchmark systems for SWB<sup>39</sup>. However, most of the SDG indicators do not connect directly with CH, which suggests specific analytical methods to determine such links.<sup>40</sup> The HERIWELL team focused on one of the SDGs with a positive connection to SWB – gender equality (SDG 5) in heritage institutions, which refers to social inclusion as one of the three main SWB impact categories of this study. This choice is backed up by the EU *Work Plan for Culture 2019–2022*, which identified actions towards achieving more gender equality as one of its six priority areas of work. As well as this, national and international organisations active in the different fields related to CH have called, over many years, for ensuring gender balance at senior leadership levels<sup>41</sup>. In particular, this relates to more equitable conditions in the leadership of museums<sup>42</sup>.

An empirical study conducted for the EU over three decades ago<sup>43</sup> revealed that, on average, less than a third of directorship positions in art museums were occupied by women (exception: Finland). In contrast, a new report from an EU Open Method of Coordination Working Group<sup>44</sup> concluded that today ‘... more women [are] in leadership positions. For example, women fill leading positions in over 50 % of the highly frequented Swedish and Dutch museums and 63 % in Italian museums. In Poland, though, only 13 % of leadership positions in the most popular museums are held by women. The directorship of museums and galleries with higher funding tends to be dominated by men; for instance, only 23 % of directors in such organisations in the UK are women.’

Such differences suggest the following **research question**: *Can a Europe-wide SWB trend towards an adequate gender balance in the leadership of important museums be empirically verified?*

<sup>38</sup> Methodological details and additional background information can be found in Annex III.

<sup>39</sup> Costanza et al. (2016) Modelling and measuring sustainable wellbeing in connection with the UN Sustainable Development Goals. *Ecological Economics* 130, 350–355.

<sup>40</sup> The notable exception is the consideration of cultural and natural heritage in SDG 11 with Target 11.4, ‘strengthen efforts to protect and safeguard the world’s cultural and natural heritage’. More information: <http://uis.unesco.org/en/topic/sustainable-development-goal-11-4>

<sup>41</sup> Compare, for example, with UNESCO (2014) Gender equality – heritage and creativity, pp. 134–5 – an excerpt is provided in Annex III.

<sup>42</sup> <https://www.culturepartnership.eu/en/article/museum-gender-politics>

<sup>43</sup> Cliche D., Mitchell, R. and Wiesand, A.J. eds. (2000) *Pyramid or pillars: Unveiling the status of women in arts and media professions in Europe*. Bonn: ARCULT Media, pp. 18–20.

<sup>44</sup> OMC Working Group Report (2021), Towards gender equality in the cultural and creative sectors, p.103.

Without comprehensive European museum statistics covering this issue<sup>45</sup> and considering the limited resources available for original empirical research in the HERIWELL project, this question had to be answered with a trend analysis of selected local institutions. Potentially, it could inspire future investigations into women's presence in top management positions of CH institutions as well as in possible consequences for exhibitions or audience development. The same applies to research on the representation of women in museum collections, as exemplified in a recent Norwegian study<sup>46</sup>.

The **definition of an 'adequate gender balance'** is crucial here: Could an ideal benchmark be the 50:50 parity? Or should we instead consider the much higher rate of female students and graduates in specific university subjects, who prepare for senior functions in museums and other heritage institutions? We consulted long-standing statistics of Eurostat and the European Institute for Gender Equality (EIGE) on the dominant share of female graduates in the humanities at the EU-28 level. Accordingly, a realistic benchmark for an optimal ratio of female leadership positions in museums focusing on the arts and culture should go beyond formal parity – above the 50 % threshold.

To operationalise the assessment, three criteria for the selection of museums were adopted (more details in Annex III):

- a) Investigations are focused on **public institutions**, since the staffing of private museums or galleries does not necessarily obey policy standards of gender equality or mainstreaming.
- b) To consider truly 'important' institutions in the sense of the research question, only trends in **national or state-financed museums/collections in selected European capitals** are analysed. To exclude random results, at least 12 of the institutions should be available for comparison in each of these capitals.
- c) To fully take into account the qualification profiles for senior museum staff, only **directors of cultural museums or collections in the narrow sense** are considered (technical, 'political' or natural history museums are excluded from the evaluation because of potentially different staffing policies).

A benchmark publication, the *International Directory of Arts* (2004 edition, based on 2003 data and compared with information from 2021 websites), serves as **main source for the evaluation** of staff trends in state-funded museums or collections of 14 European capitals during the last two decades.

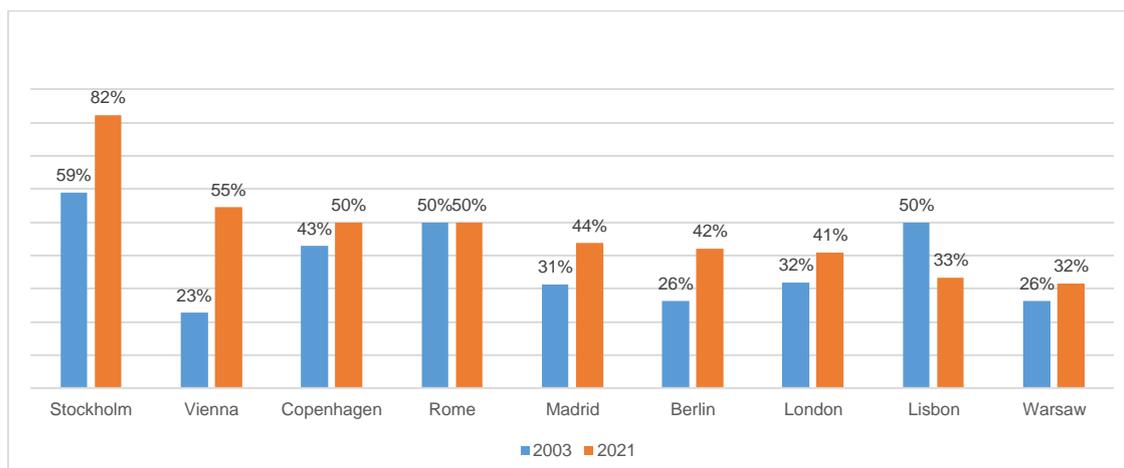
## 3.2 Main findings

Figure 3.1 provides an overview of the gender distribution among directors of 188 state-funded cultural museums or collections in 2003 and 2021 in Berlin, Copenhagen, Lisbon, London, Madrid, Rome, Stockholm, Vienna and Warsaw (detailed figures can be found in Annex III).

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<sup>45</sup> Compare with the EGMUS Standard Questionnaire: <https://www.egmus.eu/en/questionnaire/>

<sup>46</sup> Holm M. and Aarbakke T. (2020) There she goes again: A project on gender representation in Norwegian museums' collections and exhibition practices, *Museum International* 72(1-2): 92–103. An excerpt is in the Annex.

**Figure 3.1 Share of women directors of state-funded museums in nine European capitals, 2003 and 2021**

Source: HERIWELL Consortium, based on the International Directory of Arts 2004 (editorial deadline August 2003) and online research April to July 2021 for the same museums or collections

Figure 3.1 shows that the overall share of female directors in 188 state CH museums of the surveyed capitals grew from 36.7 % in 2003 to 47.8 % in 2021. A closer look shows an uneven development of the most prestigious (and usually well-paid) director's posts of the analysed national museums and collections in European capitals. Despite progress in the gender-balanced staffing policy of these museums during the period, only two of the nine highlighted cities reach the rate of above 50 % female museum directors.

Four additional capitals, where the quorum of 12 museums or collections has not been met (Athens, Rīga, Tallinn and Vilnius), are considered separately; together, they account for 27 institutions. The trend figures are, already from the outset, clearly higher than in the above cases, but slightly less dynamic: 59 % female directors in 2003 compared to 67 % in 2021. When looking closer at the analysed capitals in this group we note:

- in two cases, Athens and Rīga, a further increase of women in top management positions in state-funded museums (in the latter city up to 100 %);
- no change during the period of 2003 to 2021 in Vilnius;
- a decrease in the case of Tallinn (where only positions in eight museums could be compared, however).

### 3.3 Conclusions

The share of women as CEO of state museums may now be roughly on a par with other senior positions in national administrations of EU Member States<sup>47</sup>. Their share exceeds those of current CEOs of public broadcasters (currently 36 % – only the Nordic/Baltic States reach 100 %) or members of national parliaments in the EU (women's share: 32.5 %, closest to parity is again Sweden with 47 %)<sup>48</sup>. It is well above that of senior executives in private companies, where women reached only 18 % in 2019<sup>49</sup>.

In the 'Compendium' information system<sup>50</sup>, expert Tobias Harding explains the background of gender-related Swedish policies (mirrored in the above figures for Stockholm): 'The government foresees the

<sup>47</sup> IPOL Department of the European Parliament (2021) *The gender gap in the EU's public employment and leadership*. Brussels: p. 16.

<sup>48</sup> <https://eige.europa.eu/gender-statistics/dgs> (accessed July 2021)

<sup>49</sup> Eurostat News release No 40/2020

<sup>50</sup> Compendium of Cultural Policies & Trends, 2021 – [www.culturalpolicies.net](http://www.culturalpolicies.net)

public sector as a role model for the private sector and as “best practitioner” of available effective mainstreaming instruments and measures.’

The above results suggest that important cultural heritage institutions such as state-funded museums are not only mirroring changing societal values and practices. Many of them could be considered drivers of such ongoing changes, at least regarding gender equality. Recruiting conditions – and probably even role models for junior staff members – are more likely to be found in museum environments than in many other public institutions. This is contributing to SWB via equal opportunities for female professionals; however, more data are required to prove that professional standards have really changed.

Since European statistics do not yet provide gendered data for the leadership of museums, we recommend that the EGMUS standard questionnaire be enlarged to enable future monitoring. As an alternative, EIGE could be asked to provide such data at least for the largest museums in the EU (similar to data on management positions in broadcasting organisations).

## 4 Intangible cultural heritage and societal well-being

### Key findings

- ICH traditions and manifestations live from, and further develop, through the experience, practical involvement and motivation of diverse social groups, communities or individuals. Societal values and effects, many of which have direct connections with categories of well-being, are an inherent part of ICH-related activities.
- An evaluation of the 146 ICH practices in ESPON countries that are officially recognised by UNESCO was conducted. It reveals that festive events and rituals as well as traditional arts or crafts and their transmission are the most important manifestations in Europe. The majority of them (around 75 %) are found only in specific local or regional territories, with residents as the dominant ICH stakeholders.
- From the main HERIWELL SWB categories, both social cohesion (e.g. community participation, equality, integration) and quality of life (e.g. sense of place, aesthetic satisfaction, educational benefits) are relevant in over 50 % of the recognised practices.

This chapter summarises the results of a content analysis<sup>51</sup> assessing the relations between ICH and different dimensions of SWB. This is reported according to the three main sub-dimensions identified in the HERIWELL Theory of Change: quality of life, societal cohesion and material conditions. Details regarding the methodological approach and results of the analysis can be found in Annex IV.

### 4.1 Background and methodology

ICH manifestations can, potentially, make important contributions to the societal processes and priorities dealt with in the HERIWELL study. Both the UNESCO 2003 *Convention for the Safeguarding of the Intangible Cultural Heritage* and the 2005 *Faro Convention* of the Council of Europe suggest that **societal effects, values and modifications are an inherent part of ICH-related activities**. Many of these have direct connections with categories of well-being.

The prospect of such effects prompted Michel Magnier, Director for Culture and Creativity of the European Commission, to comment at a presentation of the European Year of Cultural Heritage (EYCH)<sup>52</sup>. He highlighted ‘Europe’s heritage as a rich and diverse mosaic of cultural and creative expression’ and specifically recognised in this context ‘the intangible elements of cultural heritage, including the knowledge, practices and traditions of European people’. The European Parliament, in its Resolution of 20 January 2021 on achieving an effective policy legacy for the European Year of Cultural Heritage<sup>53</sup> stressed the contribution of CH to social cohesion and economic development. It also called ‘on the Commission to adopt a more integrated approach towards cultural heritage, giving equal treatment to tangible, intangible, natural and digital heritage.’

However, what instruments could empirically prove the diverse ICH-related meanings and apparently beneficial impacts, given the absence of comparable data as well as the limited time and resources available for the project? The HERIWELL team decided to test, as part of its pan-European analysis, a hands-on operational approach aimed at learning more about the relationship between ICH and SWB. That approach could be implemented via **a content analysis**, based on the semi-standardised dossiers regarding protected ICH manifestations found in three official, annually updated lists<sup>54</sup> provided by UNESCO. (The *Representative List of the Intangible Cultural Heritage of Humanity* being the most

<sup>51</sup> Content analysis refers to an analysis of texts and documents that seeks to quantify the content in a systematic and replicable way, using predetermined categories (Bryman, 2012).

<sup>52</sup> 2019/2194(INI)

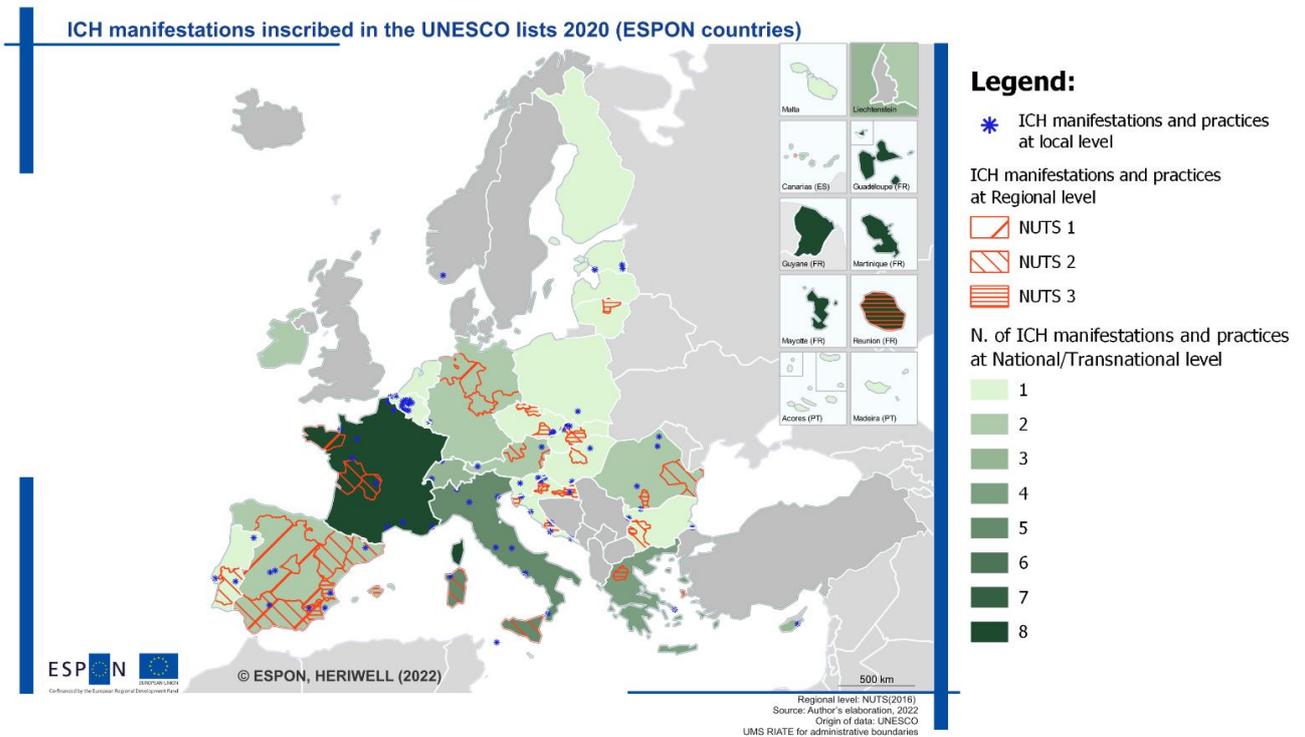
<sup>53</sup> European Commission (2018) *Creative Europe: Rediscovering our cultural heritage*, Luxembourg.

<sup>54</sup> <https://ich.unesco.org/en/lists> As shown in the annex, the HERIWELL team has been aware of critical assessments of the UNESCO lists.

prominent one among them). Only ICH items from ESPON member countries were taken into account for the analysis, which was performed in January 2021. To conduct the content analysis in line with the HERIWELL methodology, definitions needed to be refined to best match the European context (there are more details in Annex IV).

Map 4.1 gives a first impression of the regional distribution of manifestations inscribed in the UNESCO lists that are assessed in this chapter.

#### Map 4.1. ICH heritage inscribed in the UNESCO Representative List 2020



Source: HERIWELL Consortium based on 2020 UNESCO data

## 4.2 Main findings

The following figures summarise the main findings derived from the assessment of UNESCO's ICH nominations in 26 ESPON countries<sup>55</sup> (% share of 146 inscriptions in the three UNESCO ICH lists).

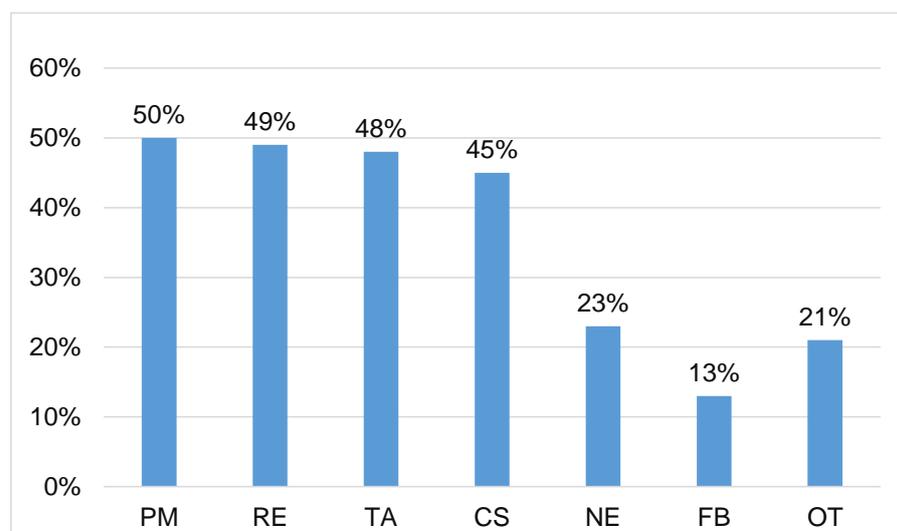
Figure 4.1 first highlights the **main characteristics** of, and functional roles in, manifestations registered in the three assessed lists. These are based on UNESCO's own global characterisations of ICH activities considered worthy to be protected, with a few modifications to better catch European specificities. Half of these **types of ICH involvement** depend on the **active or supportive engagement of 'heritage communities'** ranging from small groups pursuing family traditions to ethnic or linguistic minorities to the general population. Particularly **festivities, rituals and traditional arts** activities could survive thanks to the different forms of engagement provided by these communities; however, **traditional crafts** do not figure at the top of the overall ranking. In our analysis, this may result from shifting skills involving the production or preparation of **traditional food and beverages** into a separate category. In Europe this is often regulated or protected as a domain of specialised professionals, or local or regional farmers and businesses category. Another possible explanation resulting from the analysis of listed ICH activities (see Table 3.4 in Annex IV) could be national priorities in nomination processes for the UNESCO lists. For

<sup>55</sup> Austria, Belgium, Bulgaria, Croatia, Cyprus, Czechia, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and Switzerland.

example, there are higher rates of nominated crafts traditions in states of Central Europe as well as in France, Greece and Italy.

Content analyses are quite flexible research tools and the categories shown in Figure 4.1 could be further expanded or differentiated. Two examples: the first is **ICH education, training or mentoring**, which is not listed separately since it is relevant in nearly all studied items. Second, at least 21 of the 146 ICH manifestations (14%) have a **religious or ecclesiastical background**. Most of them can be found in countries with a strong Roman Catholic tradition (such as Belgium, Croatia, Italy, Poland and Spain) and are still connected with church rituals or celebrations today. This is why they currently figure in the more comprehensive category RE (rituals / festive events / religious celebrations) together with a larger group of secular manifestations.

**Figure 4.1. Attributes of recognised ICH activities in Europe (ESPON countries only; N = 146, inscriptions in UNESCO's ICH lists 2020)**



Legend: PM = Active engagement of the population, e.g. dedicated 'heritage communities', families and minority groups in safeguarding ICH manifestations and traditions; RE = Rituals / festive events / religious celebrations; TA = Traditional arts (music, theatre, dance etc.) and oral expressions; CS = Crafts skills and their transmission / early industrial practices; NE = Nature-related traditions / environmental care; FB = Food and beverage traditions and related agricultural practices; OT = Other ICH functions, values and activities (e.g. events of high importance for cultural tourism; involvement of, or inspiration to, contemporary artists). NOTE: Several of these attributes can apply, on average 2.5 (multiple choice).

Source: HERIWELL Consortium based on the 2021 UNESCO ICH lists

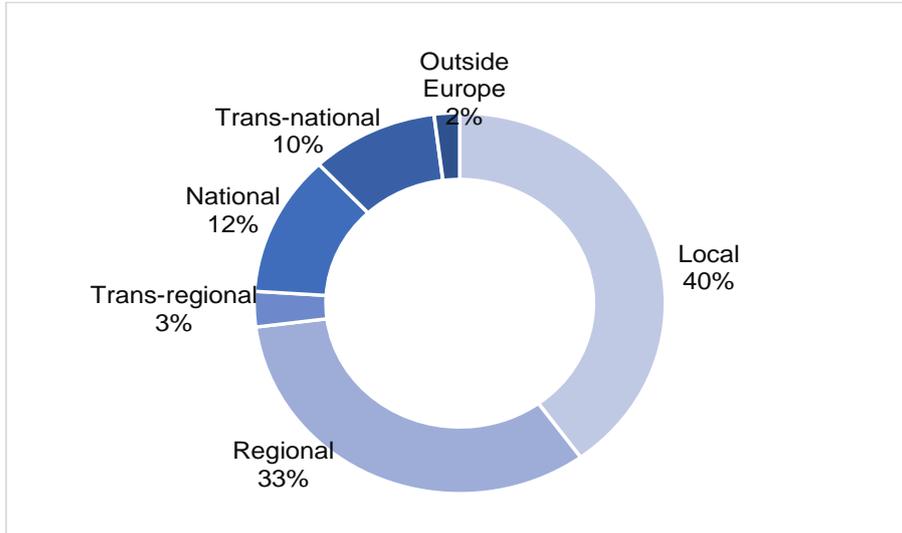
As to the **territorial distribution of ICH** manifestations listed by UNESCO, the potentially highly diverging environments need to be taken into account. Two examples, both listed in the *Representative List of the Intangible Cultural Heritage of Humanity*, are:

- In cases like the 'Blueprint' (*Blaudruck/Modrotisk/Kékfestés/Modrotlač*), only a few families and crafts people in Austria, Czechia, Germany, Hungary and Slovakia are the bearers of this ICH tradition. Most of them are in remote rural areas; the HERIWELL Blueprint case study from Czechia highlights these conditions.
- On the other hand, ICH manifestations can be mass events that involve large parts of the population, sometimes across national borders. For example, the traditional **Baltic Song and Dance Celebrations held in three countries**, Estonia, Latvia and Lithuania, regularly attract tens of thousands of participants. A 2017 survey<sup>56</sup> revealed that 38 % of Latvian, 37 % of Estonian and 31 % of Lithuanian inhabitants had so far been actively involved in the celebrations. They took part as singers, dancers, organisers or in other capacities during the events with most of them as members of participating choirs. In addition, 45 % of Latvian, 65 % of Estonian and 51 % of Lithuanian inhabitants took part in these celebrations as spectators.

<sup>56</sup> Laķe et al., (2017) Critical Heritages – CoHERE: Performing and representing identities in Europe, Work Package 3 (Survey), Riga (Latvian Academy of Culture), p. 6

Figure 4.2 shows that roughly 75 % of UNESCO’s ICH nominations in ESPON countries can be found in local or regional settings. In a few cases, regional traditions reach beyond national borders. These results confirm the **strong community ties and regional diversity of ICH**. In contrast, national or transnational nominations each account for only about 10 % of the assessed cases.

**Figure 4.2. Territorial distribution of inscriptions in UNESCO ICH lists (ESPON countries)**

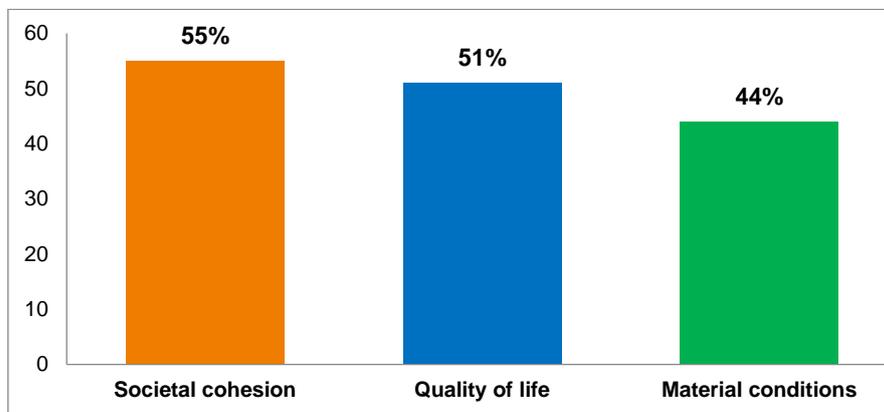


Source: HERIWELL Consortium based on the 2021 UNESCO ICH lists, (the territorial categories are defined in Annex IV, Section 3.2)

As regards **the three main HERIWELL SWB categories**, they can all be relevant for manifestations inscribed in the UNESCO ICH lists. Figure 4.3 demonstrates that ICH manifestations relate strongly to both the **societal cohesion** and **quality of life** dimensions. This also confirms suggestions that emerged during HERIWELL outreach events. Accordingly, even though societal cohesion seems to be slightly more related to ICH, it should also be analysed in connection with the quality of life that represents an equally important SWB dimension touched upon by CH.

A more surprising result of the assessment is the strong position of the category **material conditions**. It stems mainly from opportunities for full or semi-professionals and businesses in the context of ICH manifestations. What used to be voluntary work or family engagement in the past is now sometimes, at least in part, delivered by craft workshops or service providers and their employees. Cultural tourism also plays a role in that respect, because it requires specific service qualities that normally require professional experience.

**Figure 4.3. Distribution of UNESCO’s ICH Lists according to key HERIWELL SWB categories (ESPON countries)**

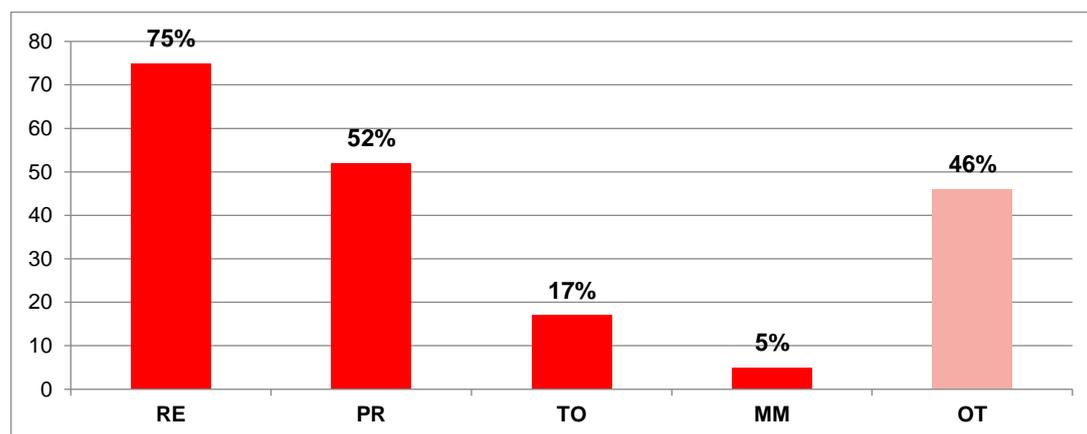


Legend: Societal cohesion (e.g. equality, community participation, integration); quality of life (e.g. sense of place, aesthetic satisfaction; educational benefits); material conditions (e.g. professional opportunities, housing)

Source: HERIWELL Consortium based on the 2021 UNESCO ICH lists

One of the objectives of HERIWELL has been to determine whether ‘disparities exist between societal impacts of cultural heritage for **different groups of stakeholders**’ (particularly as regards residents, tourists, minorities and migrants, but potentially also arts and heritage professionals). This objective has been particularly difficult to answer with the available empirical evidence, due to the absence of truly comparable data. This deficit can partly be overcome by determining who are the bearers of ICH – heritage communities and sometimes also individuals, as well as involved societal groups. The UNESCO lists provide the basis for such an analysis because of specific requirements to be addressed in the application forms. Figure 4.4 presents a summary of the assessment for this question.

**Figure 4.4. Share of UNESCO’s ICH lists relevant to societal well-being of different groups of stakeholders (ESPON countries)**



Legend: RE = Residents; PR = Heritage/cultural professionals in the narrow sense; TO = Tourists; MM = Minorities or migrants; OT = Other stakeholders (strongly represented in this category are professionals dealing with animals, such as shepherds or horse breeders; other professionals e.g. in gastronomy; specialised shops and trade; religious believers and clergy)

Source: HERIWELL Consortium based on the 2020 UNESCO ICH lists

**Residents are the main group** whose societal well-being may be affected by the ICH 146 UNESCO cases. This could be due to the fact that local and regional ICH dominates the UNESCO lists (see Figure 4.4). The second largest group are **heritage and cultural professionals**. Less relevant in ICH manifestations are cultural tourists and minorities, which relate to some of the previous results. The category ‘other stakeholders’ (OT) is important, because it seems to reinforce the findings mentioned in the figure above: professionals involved in different types of ICH activities are frequently identified as stakeholders in the UNESCO dossiers (in 25% of all cases).

### 4.3 Conclusions

The results of the content analysis of dossiers contained in the UNESCO ICH lists and the detailed figures presented in Annex IV provide fairly detailed empirical insights. These insights illustrate the ICH and SWB domains, the territorial distribution – revealing strong community ties and regional diversity of ICH – and the main stakeholders of ICH manifestations. The results are largely **interconnected and consistent**, suggesting reliability. The relevance of ICH for the key HERIWELL SWB categories could also be established.

As regards this latter result, it has been discovered that ICH manifestations impacting on SWB are not only interconnected but often **multidimensional** (several of the main HERIWELL SWB categories can be relevant for one of the inscriptions in the UNESCO lists). The assessment suggests that on the one hand, societal effects could play the largest role in ICH-related activities. For example, participation in traditional performing arts ensembles or shared collective experiences during festivities and other events can help to forge stronger ties between different groups in the population. On the other hand, descriptions provided on the application forms frequently underline that safeguarding ICH-related traditional practices requires (i) respect of traditions, (ii) efforts to individually transmit knowledge, and (iii) motivations as well as intergenerational support in families, which clearly relate to quality of life. However, clear-cut national or regional identity claims are difficult to establish in more and more diversifying societies. They would also need to stand the test of human rights compatibility, as explained by Lucas Lixinski: ‘One must be mindful

that cultural identity will only be protected with the help of the ICH Convention in terms that comply with universally recognised standards.<sup>57</sup> In some of the cases, such concerns could be raised regarding gender discrimination or deficits for example, regarding the respect for cultural traditions of minorities (see Chapter 5).

In an extended interpretation, the findings of the content analysis relate to the different **stakeholder values** of the designated ICH manifestations:

- First, **symbolic values** connect ICH practices and their communities as the bearers of traditions. They assume responsibility for their safeguarding and are endowed with the potential benefits from the enjoyment and exploitation of those resources.
- Second, the **historic, aesthetic and technical values** are appreciated by heritage professionals. As curators or scholars, they can benefit from knowledge transfer, as craftspeople from the productive capacity of traditions. Increasingly, digital means and other new technologies come into play in efforts to document, assess, valorise and also safeguard ICH traditions in Europe<sup>58</sup>.
- Third, the potential of ICH to generate valuable and meaningful **cultural experiences** for visitors and tourists also generates economic activity and **material benefits** for specific territories.

These results merit **further, more detailed investigations**, including with regard to ICH lists on national and regional levels. However, efforts to harmonise criteria for inclusion in such lists and related documentation standards should be intensely pursued to receive comparable results. Furthermore, the fact that often no clear boundary between tangible and intangible CH exists should be taken into account as these categories may be interlinked. The CoE Cultural Routes programme is based on thematic, organisational and network criteria to achieve this status. Therefore, it could probably be considered as a relevant basis for future investigations of **'mixed CH'**, because in many routes both TCH and ICH are relevant.

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<sup>57</sup> Lixinski L (2016) Intangible cultural heritage. In: Wiesand AJ, Chainoglou, K, Śledzińska-Simon AY and Donders Y (eds) *Culture and Human Rights: The Wrocław Commentaries*. Berlin/Boston/Cologne: De Gruyter, pp. 189–191.

<sup>58</sup> For example, in Albania the use of new technologies enabled the R&D project AlbSmartFolk (revitalising intangible cultural heritage in Albania), as reported in 2022 to the HERIWELL team by Majlinda Lacaj, Centre for Research and Development of the Albanian Folklore in Shkodër.

## 5 Cultural Heritage and individual perceptions of well-being: the results of the HERIWELL survey in eight ESPON countries

### Key findings

- What is perceived to be cultural heritage and its symbolic values have deep cultural roots and is different for different national contexts. This influences the perceptions of the societal benefits and negative effects for people of different countries.
- The engagement with cultural heritage is related to the awareness of the potentially positive and negative effects of CH over individual and societal well-being. Many times this happens independently on the intensity or form of that engagement.
- Education is the most important personal characteristics to explain differences in engagement and the intensity of engagement, and is also the most stable relationship across countries. This is not the case for other relevant factors such as age, sex and regional influences.
- Education is also the factor that explains most the awareness and concerns about the impact of Covid-19 on the heritage sector. It is the one that is related to the higher willingness to engage more. There are differences in the national responses about the impact of the Covid-19 crisis on the sector, as an indication of the variety of access restrictions across countries.
- Disengagement with CH is generally related with not having an opinion (either positive or negative) about the potential influence that CH has on the life of communities.
- There are remarkable country similarities on the correlates of perceptions of the linkages between CH and the individual, social cohesion and social material dimensions of CH, notably the effect of education and gender effects. The social cohesion dimension is the one where more differences among countries are found.

### 5.1 Objectives and scope of the HERIWELL population survey

The HERIWELL survey aims to investigate people's perceptions on the impact of all forms of CH on SWB (both in general and in the context of Covid-19), and their attitudes on and access to heritage. Some of the questions correspond to those asked in the [2017 Eurobarometer CH survey](#), which could potentially inspire future comparisons with ESPON countries not surveyed this time.

The HERIWELL survey considered: the intensity of engagement with CH; the barriers for not engaging with CH; the perceptions of positive or negative impacts of Covid-19 on the view and use of CH; the opinions about the impact of CH on different dimensions of well-being.

The main objectives of the survey were to stratify respondents into 'consumers' or 'active' CH users and those not interested, and identify the barriers to access. This was to show the impacts of Covid-19 on people's view of CH and on their use of digitised heritage-related content on the Internet and in social media. It was also aimed to identify the perceptions about the heritage-related quality of life, societal cohesion and material conditions.

The survey was carried out in eight European countries (Belgium, Czech Republic, Germany, Ireland, Italy, Norway, Poland and Spain) selected on the basis of: i) the geographical coverage of all ESPON areas; ii) the coverage of both EU and non-EU countries part of the ESPON programme; iii) the consideration of a large part of the ESPON countries' population; iv) the representation of different levels of GDP and cultural heritage resources.<sup>59</sup>

<sup>59</sup> The same countries were selected to carry out the HERIWELL case. Some were considered in the ESPON HERITAGE project (Austria, Brussels, Flanders, Italy, the Netherlands, Norway, Portugal, Romania, Slovakia, Slovenia and Sweden).

The questionnaire (see Annex V) is based on closed questions and was implemented using a CAWI between 28 May and 8 June 2021 by YouGov (Germany) in collaboration with its European partner institutes (all addressed in their national language). This covered 8,818 respondents overall and led to a final sample of around 1000 individuals aged 18 and over for each country, except for Ireland (507) and Germany (2141).<sup>60</sup>

The survey adopts the **broad definition of CH and SWB** detailed in the HERIWELL Theory of Change (see Chapter 1). It collected people's perceptions on tangible, intangible and digital cultural heritage, as well as on all the dimensions of SWB considered in the project. **The responses were analysed using descriptive statistics and multivariate analysis.**<sup>61</sup>

## 5.2 Engagement with CH and participation barriers

Citizens can become engaged with CH by multiple means and with different levels of intensity. The means and intensity of engagement influence the knowledge and awareness that people have about the values embedded in cultural heritage assets (whether tangible, intangible, digital or mixed). They further condition the perceptions about the potential impact that CH has on different dimensions of SWB. They can also inspire national programmes aiming at greater awareness of such impacts in broader sections of the population<sup>62</sup>.

Figure 5.1 represents the percentage of respondents that declared being involved (or not) in CH by different means. The most frequent answers come from respondents who describe themselves as **caring about CH but being less involved** (41%) and from those reporting just **occasional visits or other forms of participation** (31%). In the group of respondents identifying themselves as **regular users of CH offers** (20%), differences related to gender, age or occupation are on the whole less relevant than *the level of education*. Among regular users, there is a large variation among countries, with Spain (32%) at the upper end and Germany (14%) on the lower end of the scale. Among the reasons for a more guarded stance on CH in some countries compared to others could be the presence of a less abundant or world-famous heritage endowments. There might also be some 'historical burdens' as well as terminological problems. For example, the term and concept of a holistic cultural heritage – 'Kulturerbe' – is less firmly rooted in Germany<sup>63</sup> (which does not exclude a strong interest in some of its institutionalised forms, particularly as regards museums and their collections). Such term, frequently used during the Nazi regime and later in the former GDR, gained more ground only during the last decades, mainly in connection with the world heritage sites and conventions of UNESCO

<sup>60</sup> More information about the national samples is in Annex V

<sup>61</sup> The statistical methods for the quantitative analysis and the regressions results are presented in Annex V. Stata 15 was used for this analysis. For the intensity of engagement and opinions about the different dimensions in which CH might influence SWB ordered probit models were estimated for each country. The identification of barriers to engagement and the positive or negative mood derived from the impact of Covid-19 on CH were estimated with multinomial logit models. The multivariate analyses estimated how the variables were affected by personal and regional characteristics: sex, age, educational group, labour or occupational status and region of residence at the NUTS 2 level. Because of slight differences in some variables used in the YouGov panels of the participating countries, the explanatory variables were recoded to improve international comparability.

<sup>62</sup> As discussed at the Swiss conference 'Kulturerbe, ein gemeinsames Gut. Für wen und warum?' [Cultural heritage as a common good. For whom and why?] in CH-Biel/Bienne, 15-16 March 2018, organised by NIKE – Cultural Heritage/Patrimoine Culturel

<sup>63</sup> cf. François, É (1999) Écrire une histoire des lieux de mémoire allemands. In: *Matériaux pour l'histoire de notre temps* 55/56: p. 84, and for the German terminology used in heritage protection laws and policies, Wiesand, A. (1994) Allemagne: héritage culturel et symbolique de l'Etat. *Le Debat* 78: 140–154.

When we consider the association between individual characteristics and the probability of participating in CH in more intense ways, there are some interesting differences between countries. As expected, there is a common pattern in the relationship between education and participation.

- **Education** is found to have the highest effect on the degree of engagement. In general, with respect to a baseline category for individuals that have completed secondary education, individuals with lower education attainment have a smaller probability of becoming engaged in more intense ways. More educated individuals, notably those with university education, have a greater probability of more intense participation.<sup>64</sup>
- The effect of **age** is far from being homogeneous across the countries analysed. For instance, the intensity of engagement in Italy is higher for people in the 18–24 and in the 25–34 age groups (compared to the 45–54 category); in Spain, it is 18–24. For the Czech Republic and Poland, being in the 65–74 age group increases engagement. In Ireland, for individuals in the 18–24 and in the 75+ age groups, the probability of a more intense engagement is higher, but it is lower for the 35–44 group.

**Table 5.1. Are you involved, in any way, in the field of cultural heritage?**

(Multiple choice; responses in %; N = 8,818 respondents)

Strength of involvement	INVOLVEMENT (+/-)	TOTAL	Belgium	Czech Rep.	Germany	Ireland	Italy	Norway	Poland	Spain
STRONG - OR PROFESSIONAL - ENGAGEMENT	I am a regular visitor: I frequently (at least three times per year) visit cultural heritage institutions such as museums, archives or archaeological sites, or go to traditional cultural event	20%	15%	25%	14%	19%	24%	15%	20%	32%
	I am an activist or sponsor: I do voluntary work at least yearly (e.g. volunteering for a museum, participating in traditional dancing) and/or donate money (e.g., to an association) to protect and promote cultural heritage	4%	4%	3%	4%	4%	5%	4%	3%	3%
	I am a student or an expert: I work or study in a field that is related to cultural heritage	2%	2%	3%	2%	3%	4%	2%	1%	4%
OCCASIONAL INVOLVEMENT (INCL. VIA MEDIA)	I am a casual visitor: I occasionally (less than three times per year) visit such cultural heritage institutions or go to traditional	34%	32%	44%	30%	38%	35%	32%	32%	37%
	Media helps me to understand or appreciate cultural heritage: At least once per month I watch movies or documentaries, read books/magazines or use online resources with heritage content	28%	23%	35%	25%	28%	31%	19%	35%	33%
MINOR - OR PASSIVE - INVOLVEMENT	I care about cultural heritage, even though I am not involved much in related activities	41%	41%	39%	33%	48%	42%	43%	46%	46%
	Cultural heritage surrounds me in my daily life: I live in an area with significant historic or cultural value	17%	9%	24%	10%	22%	25%	13%	20%	22%
NO INVOLVEMENT	Not interested / involved: none of the above applies to me.	19%	22%	11%	31%	18%	8%	26%	14%	8%
% TOTAL (sum of multiple answers)		165%	149%	184%	148%	180%	174%	155%	171%	185%



Source: HERIWELL population survey 2021 (Field work: YouGov); red colour indicates the lowest registered values, while the green one indicates the highest registered values.

<sup>64</sup> Note that levels of education were collected in the survey according to national classifications and different criteria, so they are not fully comparable. For Italy, Poland, the Czech Republic and in Spain, all educational levels higher than secondary degrees are found to be associated with higher intensities of engagement in a monotonic way. A university degree is the variable that determines higher intensity in Ireland and Norway. For Germany, the highest level of education recorded in the survey is having completed Abitur or more (thus, it is not possible to distinguish among different levels of post-secondary education).

There are different reasons for disengagement and for not becoming engaged because of various **barriers to CH participation**.

**Figure 5.2.** distinguishes between **individual barriers** and **anticipated institutional or structural deficits**. The results show the former clearly prominent, with perceived *high costs* (34 %) or *lack of time* (24 %) especially in the youngest generation, as the most frequently mentioned barriers. Costs seem to be of particular concern for respondents from Italy, Spain and Belgium. A regular ticket for the *Galleria Uffizi* in Florence for example, which currently costs €20 (children are free)<sup>65</sup>, could become quite a burden for certain groups of visitors. This is especially the case if compared with entrance prices in other European museums that are not touristic hotspots. On the other hand, such costs still look almost affordable if compared with ticket prices for the Italian *Serie A* football league, which can easily range between €50 and €150.<sup>66</sup> Participating in CH activities is often deeply rooted in social structures and family practices; this suggests, in turn, that people who are deprived from such contacts could be less motivated to participate in heritage activities (16 %). Again, this figure is – somewhat surprisingly – highest in the youngest group of respondents (25 %). The group of respondents that confesses to be not interested at all in such activities shows very large variations, with answers ranging from 5 % in Spain to 18 % in Belgium. As expected, the *education level* seems to be the *key variable* for this answer.

The category '*not enough information*' is the *third-most selected answer* to the question on *obstacles to CH access* (22 %). It could be attributed to both individual and institutional barriers: whether respondents' use of contemporary information tools is impaired, or that the offers made by CH institutions or initiatives do not correspond to their needs or preferences. As for *individual barriers*, the original hypothesis that this might be an issue especially for the older generations could not be verified. As regards *structural or institutional barriers*, a lack or limited choice of CH opportunities in the neighbourhood is especially *felt in (rural) regions* of Poland, Spain and Ireland. This is indicated by over 20 % of the respondents. In more densely populated countries such as Belgium (10 %) this answer is less relevant. A *lack of reception facilities* for specific groups of the population is noted *mainly in Spain and Ireland* (15 %).

From the multivariate analysis of the individual and territorial correlates to barriers in each country, the following two main results emerge:

- The **regional variables** tend to be more relevant for barriers related to limited supply, no information and lack of ancillary services.
- No interest seems to be related negatively to the **level of education**, as well as identifying a limited supply (though the effect is positive in some countries and negative in others).

<sup>65</sup> <https://www.florence-museum.com/it/biglietti-galleria-uffizi.php>

<sup>66</sup> <https://www.gosporttravel.com/en/football/serie-a>

**Table 5.2. Sometimes people find it difficult to access cultural heritage sites or activities. Which of the following, if any, are the main barriers for you?**

(Multiple choice; responses in %; N = 8818 respondents)

Types of barriers	BARRIERS	TOTAL	Belgium	Czech Rep.	Germany	Ireland	Italy	Norway	Poland	Spain
INDIVIDUAL BARRIERS	Costs are too high (e.g. high entrance fees, travel to sites)	34%	39%	33%	28%	28%	47%	30%	35%	41%
	I don't have time	24%	26%	23%	22%	19%	40%	16%	24%	21%
	I have no partner who could join me for such activities	16%	16%	19%	16%	11%	28%	9%	17%	10%
	I am not interested	12%	18%	6%	17%	9%	6%	17%	8%	5%
	I don't have enough information about heritage activities I could participate in	22%	26%	25%	17%	27%	16%	23%	26%	28%
STRUCTURAL OR INSTITUTIONAL BARRIERS	There is a lack of, or limited choice of cultural heritage opportunities in my neighbourhood or region, also because some of this is not accessible	17%	10%	16%	16%	21%	12%	13%	23%	22%
	There is a lack of reception or service facilities (for children, elderly or disabled, etc.)	9%	4%	12%	5%	15%	12%	6%	12%	15%
NO OR OTHER BARRIERS	None of the above applies / Other reasons	20%	17%	20%	24%	21%	10%	28%	17%	14%
% TOTAL (sum of multiple answers)		154%	157%	154%	145%	150%	172%	141%	162%	156%



Source: HERIWELL population survey 2021 (Field work: YouGov); red colour indicates the lowest registered values, while the green one indicates the highest registered values.

### 5.3 Impact of Covid-19 on heritage views and behaviour

According to the results shown in Figure 5.3, a **majority of the respondents** in most of the surveyed countries registered **negative impacts of the pandemic with regard to their heritage-related views or behaviour**. Lockdowns and other restrictions figure on top of these negative effects (for 35 % of all respondents), particularly in those countries that suffered most under Covid-19 (Czech Republic, Spain and Italy). Norway is a remarkable exception regarding this pattern, and this finding has been interpreted as evidence of specific characteristics regarding population, heritage supply and seasonality in the heritage participation activities.<sup>67</sup>

**Concerns about potential repercussions for the cultural sector at large** are the second most-mentioned answer (26 % of the respondents). Restricted possibilities for social interaction and human communication

<sup>67</sup> Norwegian country expert, Per Mangset, explains what may have contributed to the very high rate of respondents in that country (56 %) who did not experience much change, despite strict Covid regulations. First, Norway is a sparsely populated country. As Covid-19 infects more easily in densely populated areas, this may also explain why fewer people have been contaminated or died in Norway than in many other countries. Second, many cultural heritage sites in Norway are relatively small and located in rural areas. It has probably been possible to visit them (with face mask and sanitised hands) despite the pandemic. Last, Norwegians visit cultural heritage sites in summer, in particular, often in the countryside. Last summer the contamination level in Norway in general was very low. It was relatively high in Oslo, and the most famous heritage sites there were certainly closed down. Foreigners could not visit Norway last summer, and Norwegians had to travel (during holidays) only in their own country ... [and] visited cultural heritage sites in the Norwegian countryside.

were felt negatively by 16 %. Daily concerns of survival in pandemic times lowered the interest in heritage activities for over 10 % of those interviewed.

However, some of the respondents also registered a **shift of motivation to engage more in heritage-related activities**. About 20 % – and even 30 % in Ireland and Italy – want to see more of the national and regional cultural resources, once the pandemic has gone. For 13 % this desire extends to heritage sites in other European countries. Volunteering and other practical forms of engagement are planned by over 10 % of the respondents in Ireland, Italy, Spain and Poland.

From the regression analysis, we can conclude that:

- The **awareness of positive expectations and negative impacts of Covid-19** were more likely to be present among the **highly educated** (in comparison with those holding only a secondary education degree).
- As regards **gender differences**, being a woman increases the probability of having negative feelings about the impact of Covid-19 on heritage and heritage participation in Germany and the Czech Republic. However, in Italy women seem to have more positive hopes for CH experiences in the future.

The perceptions of the impact of Covid-19 on the personal involvement and feelings about CH are related to the **degree of participation**. The HERIWELL survey asked whether the individual had experienced a number of feelings. These feelings were grouped in terms of conditions that only **lowered the interest for CH** (36 %), that most **increased the worries for the CH sector** (33 %) and that **increased the interest for CH** (31 %). **Very different patterns can be observed according to the intensity of the engagements.**

- People with **no involvement or interest at all in CH** were the **most likely not to experience any impact or just to decrease their interest in CH**. It is however curious that 5% in this group manifested that the crisis had increased the desire to engage ('It strengthened my desire to engage more' or 'it increased my desire to see CH in my country or region' or in 'another European country').
- People living surrounded by CH but not accessing it were **more aware of the negative effects** of the Covid-19 over the sector (no tourism), and probably over the social activity generated around historic spaces (cultural activities and more chances for social interaction).
- There are remarkable **differences in reactions from the moderate and regular groups**. Both were similarly concerned about the negative effects and worried about them. The no-impact to lower interest in the group of moderate users accounts for 31 % and in the group of regular users it is 11 %. The desire to engage more and know more particularly increased in the regular group (52 %), and the responses in the living and moderate group are similar.

The **pros and cons of a 'digital turn'** have been widely discussed among CH professionals and policymakers even before Covid-19 gave it more urgency.<sup>68</sup> The pandemic accelerated this debate<sup>69</sup>, but expectations connected with digitisation and new media still have to face the reality test. The HERIWELL survey results – see Annex V, Figure 1.4 for details – indicate that almost **33 % of the respondents** (in some countries – Norway and Germany – nearly 50 %), report **no relevant change towards the use of the Internet and social media during Covid times with regard to CH-related information**.

We can find two perspectives of the answers that are almost level: respondents where the new media turned out as **a real alternative or inspiration** during the pandemic and others who are still **sceptical or prefer to experience 'real'** (analogue) CH artefacts, sites or traditions. Both perspectives need to be accommodated in future CH policies.

<sup>68</sup> A topic discussed, inter alia, at the WE ARE MUSEUMS conference of the Network of European Museums Organisations (NEMO), 15 September 2017. In his role as Luxembourg's Minister of Culture, Prime Minister Xavier Bettel presented a digital strategy for national cultural heritage on 26 June 2018, according to <https://chronicle.lu/category/culture/26287-luxembourgs-cultural-heritage-being-digitally-archived>.

<sup>69</sup> Peter Weibel, Austrian artist and director of ZKM, in an interview published by <https://www.monopol-magazin.de> (*Museen müssen das bessere Netflix werden*, 13 October 2020), demanded: 'Museums must turn into the better Netflix'

**Table 5.3. Since March 2020: How did the Corona pandemic and related restrictive measures impact on your behaviour or views regarding cultural heritage?**

(Multiple choice; responses in %; N = 8818 respondents)

Types of impact	VIEWS AND BEHAVIOUR during COVID-19	TOTAL	Belgium	Czech Rep.	Germany	Ireland	Italy	Norway	Poland	Spain
SAD FEELINGS OR GENERAL ANXIETIES	It made me feel sad that, due to the restrictions, many cultural heritage activities were impaired or impossible	35%	26%	53%	31%	31%	39%	16%	36%	47%
	I worried about the effects on the cultural sector, because I think a diverse arts and heritage sector should be sustained	26%	27%	25%	23%	25%	26%	14%	32%	40%
	It made me feel lonely; I could not meet up with friends and other people with whom I usually go to visit exhibitions or do CH activities	16%	16%	21%	14%	20%	17%	10%	17%	15%
STRONGER INTEREST OR (POST-COVID) ENGAGEMENT	It increased my desire to see the cultural resources of my country and region	20%	21%	22%	14%	30%	30%	11%	22%	23%
	It increased my desire to make new heritage discoveries in other European countries	13%	13%	12%	12%	17%	18%	9%	11%	15%
	It strengthened my desire to engage more: During the restrictions, I considered engaging more in CH activities, e.g. by donating money, joining a group practising traditional arts or crafts, or by volunteering in a museum	8%	5%	8%	6%	18%	11%	6%	10%	11%
LESS INTEREST OR ENGAGEMENT	It lowered my interest: Due to the pandemic, survival and other daily or economic concerns became much more important than participating in any cultural heritage activity	13%	15%	17%	10%	15%	13%	8%	18%	16%
NO CHANGE	No impacts: None of the above applies to me	29%	30%	17%	39%	24%	16%	56%	23%	13%
% TOTAL (sum of multiple answers)		160%	153%	175%	149%	179%	170%	129%	168%	180%



Source: HERIWELL population survey 2021 (Field work: YouGov); red colour indicates the lowest registered values, while the green one indicates the highest registered values.

## 5.4 Individual perceptions of the role of cultural heritage for societal well-being dimensions

The survey considered the different perceptions of positive and negative impacts related to CH. To classify these impacts, we followed the HERIWELL Theory of Change and the identification of the most relevant dimensions of impact: **quality of life** (at the individual level), **societal cohesion** (at the societal level), and **material conditions** (also at the societal level).<sup>70</sup>

### 5.4.1 Interplay between CH and quality of life

#### 5.4.1.1 Level of engagement and individual perceptions

The identification of two positive and one negative potential outcomes were subject to the consideration of respondents: a statement that **CH is a resource for the personal development of people**, and two statements about whether **living close to places rich in CH can improve** people's quality of life or **downgrade** it.

The study shows how agreement with the statements vary for different subgroups of the population defined in terms of the engagement with CH, but no causal effect is claimed. At least at the individual level, it can be

<sup>70</sup> The survey asked about the degree of agreement in a 4-point Likert descending scale (totally agree, somehow agree, somehow disagree, and totally disagree) and allowed for a 'don't know' response. To facilitate the interpretation of the results, the responses were transformed into an increasing ordered variable to represent the degree of agreement (two ordered and increasing categories: disagree and agree, or four ordered and increasing categories). More detailed information can be found in Annex V.

the case that individuals adopt one behaviour or another (disengagement because of lack of interest, live in a place surrounded by the CH or engage occasionally or regularly) according to their perception of the potential benefits or harm at the individual level. In general, and in the following descriptions of survey results, only associations and patterns are referred to.

Regarding **personal development**, the main result from the analysis is that **exposure to CH**, in terms of intensity of participation, **is related with more awareness** of CH to be a potential resource for personal development. This gives more agreement with the positive view. Further, there are no large differences in this pattern between the groups of engaged people, whether they just benefit from being surrounded by CH, or if they access it digitally or physically.

**People perceive that places rich in cultural heritage can affect the quality of life of residents in positive or negative ways.** These two opposite perceptions are often connected. More than one-third of the respondents agree with both statements, while another third agrees that it can improve but not downgrade the quality of life at the individual level. When considering each statement separately, the awareness of that possibility is also related to the existence of engagement, and there is a much higher agreement with the statement about positive impacts. Among the subgroups of participants that live close to CH but do not directly access it, the gap in the proportion between agreement with possible negative effects (56 %) and positive effects (77 %) is the narrowest.

#### 5.4.1.2 Country differences

The distribution of responses in the 4-point Likert scale can be compared for the eight countries where the survey was conducted. For the statement about the link of CH with **personal development** there are remarkable differences, although the 'totally disagree' and 'disagree' opinions are nearly residual in all countries. While **the modal response is 'strongly agree' in Italy, in the rest of the countries it is 'agree'**. The difference between the proportions of respondents in these top positive categories is negligible in Spain, but very noticeable in Ireland and Belgium. The proportion of respondents that did not have an opinion about the statement ranged from very small proportions in Italy and Spain (6 % and 7 %, respectively) to the highest level in Norway (22 %). The agreement with the positive effects of heritage to improve people's **quality of life** is stronger than the agreement with the negative effects. We can also find differences in the rate of awareness (reflected in the proportion of respondents that answer 'don't know').

The estimate of how the **intensity of agreement** is affected by personal and regional characteristics is based on ordered probit models for each of the national sub-samples. The explanatory variables are sex, age, educational group, labour or occupational status and region of residence at the NUTS 2 level.

There is conclusive evidence of **common patterns** for all the countries or for groups of countries. We can interpret them in terms of **differences in value perceptions associated with gender and cohort effects**, and in terms of **awareness associated with the level of education**.

- The first statement is about **personal development**, an individual outcome that could be achieved due to CH. There is evidence of a positive gender effect, as being a woman increases the likelihood of stronger agreement with the statement that CH can be a resource for personal development (in Italy, Poland, Germany and Norway there is evidence to support this). Conversely, belonging to a younger group reduces the agreement with this perception (in Italy, Poland, Germany, Ireland, Belgium), while belonging to an older group increases it (though only for Spain). Education is found to be positively associated with the agreement (with positive estimated coefficients for educational levels above Abitur in Germany, and university degrees in Ireland and Norway).
- For the **positive effect on the individual's quality of life**, there is a higher likelihood of agreement with the respective statement for women (in Italy), lower agreement associated with being young (Czech Republic, Germany, Ireland and Belgium) and higher with being old (Germany, Belgium and Norway). In some countries (Germany, Ireland), higher levels of education are associated with higher agreement, while in others (Poland), the opposite is true.
- Regarding the **negative effect on quality of life**, opposite perceptions are found in Poland (being a woman is associated with lower agreement) and Spain (higher) and, when statistically significant, it seems that young people tend to agree (e.g. Poland, Spain, Germany), while being over 55 decreases the probability of agreement.

## 5.4.2 Interplay between CH and societal cohesion

Under the HERIWELL approach to societal well-being, the collective dimension, associated with communities and intangible benefits that are enjoyed at the aggregate level, is represented by different variables. Some of them are related to positive collective outcomes (such as societal development, proudness, richness and cohesion), while others are negative (when it is perceived a source of conflict and division), or just neutral, or leading to the possibility of contestation of established heritage (for instance when evaluating if CH can have changing meanings in collective interpretations by different societies or in different periods).

### 5.4.2.1 Level of engagement and individual perceptions

The degree of agreement or disagreement with the statements can be related to the personal behaviour of the respondent when becoming engaged with CH resources. The association is more likely to be influenced by awareness due to the **exposure to, knowledge of and personal experience with CH** than the other way around (i.e. that a perception about a collective value triggers the individual willingness to engage).

For the **contribution of CH to positive societal outcomes** that enhance the cohesion of the community, there is a clear positive association between higher intensity of engagement with higher agreement rates. This is despite the differences between moderate and regular levels of participation being relatively small. As found in all the statements of the survey, the proportion of respondents that declare they are not interested in CH show the highest rates of responses in the 'do not know' category. It indicates that no exposure is related with smaller awareness about the potential of CH. The statement about the role of CH in creating collective identity and proudness is the one that achieves the highest adhesion for most of the subgroups, including those who report they are not interested.

For the negative statement, the respondents are asked to agree or disagree with **how some cultural traditions can create conflicts or hinder the integration of migrants**. Here, the proportion of the respondents that do not have an opinion decreases with the intensity of engagement. The level of disagreement increases with the intensity of engagement, but the rates of agreement (47 %) and disagreement (46 %) are similar for the most engaged and exposed respondents. This is probably because they accessed a wider variety of heritage experiences (potentially deeper, richer and experiencing the full spectrum of values and contradicting values of CH resources). **This is the statement showing the closest agreement and disagreement rates in the whole survey.**

For the **recognition that the meaning of cultural heritage can change over time**, the proportion of agreement increases for subgroups with more intense engagement, but the magnitude of the differences is not large.

### 5.4.2.2 Country differences

**This is the SWB domain presenting more differences across countries and indicators.** Overall, with the exception of Germany and Norway, respondents show high rates of agreement or disagreement for all the indicators but for the role of CH as a driver of contemporary creativity.

The views about how **CH is a source for the development of society or local communities** show different patterns. In Italy and in Spain the modal value is 'strongly agree'. In the rest of the countries, 'agree' is the alternative chosen by the majority of respondents, with the highest values for the Czech Republic, Belgium and Ireland.

The statement about the **proudness of historical monuments or sites, works of art or traditions receives a majority of 'strongly agree' opinions in all the countries**. Italy and the Czech Republic are, by far, the countries with the highest proportion of respondents that strongly identify themselves with this statement.

Perception was sought about the **contribution of the cognitive accessibility of CH** as a richness for societies that can benefit from learning more and sharing more cultural heritage in all its diversity. Respondents from Italy and Spain agree or strongly agree at nearly the same level; in the rest of the countries, the 'agree' category is more dominant. The largest share of respondents that do not know how to evaluate this statement can again be found in Germany and Norway.

The question of whether high identity values attached to CH may impede the possibility to integrate minorities and migrants into society cannot be answered only with the answers to the HERIWELL survey. Not least,

because such processes also depend on existing and enforced national integration measures and inclusive CH policies. In this sense, the respondents' **views about whether cultural traditions can create conflicts or hinder the integration of minorities and migrants** address just one part of the problem. The answers differ a lot by country: Italy and Spain present more evenly distributed responses across the positive and neutral categories of the distribution (the smaller group, by far, corresponds to 'strongly agree'). In the rest of the countries, 'agree' is the modal value.

There is a **common recognition and agreement with the statement about the changing meaning of CH over time**. The most common response is 'agree'. The proportion of people showing some disagreement is high in Italy, the Czech Republic and Poland (possibly because they considered mainly the traditions of their own country and less those of migrants). The proportion who do not know how to evaluate the statement is quite high in all the countries, except Italy and Spain. There are some common findings from the estimation of the models to explain the correlates of the agreement with different statements about the societal value of CH in terms of generating **societal cohesion**. In general, there are **gender effects** operating in a positive direction for women in all countries apart from Norway (and Spain in some cases). Being **young people** decreases the likelihood of appreciation of the positive values and increases the identification of the changing meaning of CH, whereas older people tend to agree more with the positive values.

- In most countries where we find conclusive evidence about gender effects, **being a female increases the likelihood of agreement with the statement that CH can be a resource for the development of society or local community** (Italy, Poland and Germany). The opposite can be found in Norway. Being **young people reduces the likelihood of agreement**, and being in one of the older groups increases it (with the exception of the Czech Republic, where being older reduces the likelihood of more intense agreement). There are some cases in which higher education experience increases the agreement with the statement.
- The statement on being **proud of one's CH** shows similar **positive rates of agreement among women** in most of the countries (again, the exception is Norway). As well, the pattern of a **lower agreement for young** and a higher agreement for older people can be found again.
- Another statement dealt with the **richness and cohesive power derived from learning and sharing CH in all its diversity** and we find similar **positive gender effects** as before. The age groups, in general, are such that **younger groups are more aware and agree with greater intensity with this statement**. The level of education is positively associated with the agreement in Spain and Germany. While CH and its diversity may be a richness for cohesion, it could as well be a barrier for the integration of migrants or it could exacerbate conflicts. There are very few correlates for which we find conclusive evidence. For this statement, being a woman reduces the likelihood of agreement in all the countries where statistically significant except in Poland, where it increases that probability.
- For the statement about the potentially **changing meaning of cultural heritage**, being in a **younger age group increases the likelihood of agreement** with this view in Italy, the Czech Republic, Poland, Germany, Ireland, Norway and Spain. A more detailed interpretation of these results can be found in Chapter 6 where **contested heritage** is discussed.

### 5.4.3 Interplay between CH and material conditions

The last dimension of SWB in the HERIWELL framework focuses on collective outcomes in material or productive dimensions. While the potential of CH as a driver of local economies has been widely considered in research and policies, the negative effects of over-exploitation and over-tourism have only recently been considered. The material dimension has recently expanded to consider the potential of CH as a collective cultural capital that could be a resource for contemporary creation.

#### 5.4.3.1 Level of engagement and individual perceptions

As before, being exposed to CH is related to being more willing to recognise the potential association between CH actions and the existence of those material benefits or harms. The highest range of variability in the rates of agreement happens for the statement about the **positive contribution to the local economy**, followed by being the **source of contemporary inspiration**. There is little variation about the agreement rates for the **dangers related to over-tourism** across the subgroups of respondents that have some relation with CH. In this last assessment of the harmful side of tourist exploitation of heritage resources, there is a

wide recognition of the problem. This is particularly noted within the group that lives surrounded by CH but does not access it in digital or physical ways. Only 21 % responded that they either disagree strongly or tend to disagree with the statement. Note that the arguments for the economic benefits of CH were mainstreamed a long time ago and this may correspond to the high levels of awareness.

#### 5.4.3.2 Country differences

**The majority of the respondents in each of the national sub-samples choose the ‘agree’ and ‘strongly agree’ answers with regard to the economic contribution of CH to local material development**, though there are some differences. While in six countries more respondents answered ‘agree’, the modal response in Italy and Spain was ‘strongly agree’. As for different subgroups of the population, it seems that this argument is widely recognised in these two countries. The cultural tourism industry has made wide use of tangible and intangible resources of their CH to attract local and foreign visitors. **Germany and Norway are the countries where there are more people unaware or sceptical about the existence of this type of effect.**

**The recognition of cultural heritage as a source of contemporary creativity is considered in all countries as a significant perception**, with ‘agree’ as the modal category, but there are differences in the distribution of responses. The difference between the positive insights is small in Italy and Spain, but it is remarkably high in the Czech Republic, Germany, Ireland and Belgium. In Norway, there are as many respondents who strongly agree as those who do not know what to think about this statement.

**Over-tourism was considered**, before the Covid-19 crisis, as a major threat to CH. Massive numbers of visitors could be perceived as endangering its conservation or even its very existence. The magnitude of the problem differed for different resource types, according to their fragility, as well as for different countries. It is curious that in Italy, one of the European countries where prominent examples were denounced, the proportion of respondents agreeing and disagreeing is nearly equal. For the rest of the countries, the modal category is the ‘agree’ one. It seems that the ease or difficulty in evaluating these general statements about the material economic effects (positive via economic activity and negative via over-exploitation) are hard to grapple at the personal level. They are seen more as a ‘public opinion’ issue, modelled by what is claimed in political debates or the media.

- **Women more often strongly agree with the CH being a source of economic activity at the local level** statement in all surveyed countries but Ireland (no clear evidence) and **Norway** (where negative responses prevail, similar to all collective social dimensions discussed before). It is remarkable that, in some countries, being part of **younger generations** decreases the probability of agreement with this statement.
- For the perception of **CH as a source of contemporary creation**, there are similar **positive effects on the part of women**, with the systematic difference for Norway. The effect of age especially concerns the **youngest respondents where the probability of more intense agreement is lower** (which could suggest, as in the above question, more educational efforts).
- The models that estimate the likelihood of agreement with the **identification of over-tourism as a danger to CH** itself show very few conclusive results. There are **no statistically significant patterns for gender, age or education correlates**.

**Table 5.4. Do you agree or disagree with the following opinions that are often associated with Europe's cultural heritage?**

(The table focuses on the degree of agreement: totally agree + tend to agree – for negative answers see Annex 2; responses in %; total sample: 8,818 survey respondents; green colour underlines the highest values; red colour underlines the lowest values.)

Quality of life effects											
Type of impact	Effects of cultural heritage on quality of life	TOTAL	Belgium	Czechia	Germany	Ireland	Italy	Norway	Poland	Spain	
POSITIVE EFFECTS	Cultural heritage is a <b>resource for the personal development of people</b>	77 %	72 %	83 %	72 %	77 %	88 %	66 %	84 %	83 %	
	Living close to places rich in cultural heritage <b>can improve people's quality of life</b>	72 %	67 %	72 %	67 %	75 %	82 %	64 %	77 %	78 %	
NEGATIVE EFFECTS	Living close to places rich in cultural heritage can <b>downgrade people's quality of life</b>	49 %	62 %	55 %	50 %	35 %	43 %	50 %	43 %	51 %	

Material and professional conditions											
Type of impact	Effects of cultural heritage on material conditions	TOTAL	Belgium	Czechia	Germany	Ireland	Italy	Norway	Poland	Spain	
POSITIVE EFFECTS	Cultural heritage-related activities have <b>an important role for the local economy and for creating jobs</b>	81 %	79 %	85 %	73 %	83 %	94 %	74 %	83 %	88 %	
	Cultural heritage objects, patterns or practices are a <b>resource for contemporary cultural creation</b>	76 %	72 %	79 %	70 %	77 %	85 %	64 %	81 %	83 %	
NEGATIVE EFFECTS	Areas visited by <b>large numbers of tourists can endanger cultural heritage itself</b>	62 %	66 %	62 %	68 %	59 %	45 %	67 %	51 %	70 %	



Societal cohesion effects											
Type of impact	Effects of cultural heritage on societal cohesion	TOTAL	Belgium	Czechia	Germany	Ireland	Italy	Norway	Poland	Spain	
POSITIVE EFFECTS	People should be <b>proud of their historical monuments or sites, works of art or traditions</b>	86 %	84 %	91 %	80 %	87 %	92 %	79 %	89 %	90 %	
	Cultural heritage is a <b>resource for the development of society or local communities</b>	81 %	75 %	84 %	74 %	82 %	89 %	72 %	86 %	87 %	
	Learning more about, and sharing, <b>cultural heritage</b> in all its diversity can <b>bring people together and help to respect minorities or migrants</b>	73 %	69 %	62 %	70 %	81 %	79 %	70 %	78 %	82 %	
AMBIGUOUS OR (POTENTIALLY) NEGATIVE EFFECTS / SCEPTICISM	The (positive) <b>meaning of cultural heritage can change over time</b>	53 %	52 %	43 %	56 %	64 %	47 %	58 %	52 %	56 %	
	Some cultural <b>traditions can create conflicts or hinder the integration of migrants</b>	45 %	45 %	49 %	44 %	52 %	37 %	43 %	54 %	47 %	



Source: HERIWELL population survey 2021 (Field work: YouGov); red colour indicates the lowest registered values, while the green one indicates the highest registered values.

### 5.4.3.3 Conclusions

The HERIWELL population survey proved to be a valuable research tool, not only because it underlined again the fairly positive image of cultural heritage among many citizens (as it did in the 2017 Eurobarometer survey). It also helped to assess some of the consequences that Covid-19 had for patterns of individual behaviour and related feelings during the pandemic.

The survey sheds further light on the varying meanings that cultural heritage entails as a social construct in different countries. The findings of the survey show **evidence of its changing meanings and the values that different social groups recognise in those cultural assets**. As debated in the workshops with members of the advisory group, the collective values attached to the notion of cultural heritage in any of its forms (tangible, intangible and digital) are a cultural issue itself. National perceptions of CH can already be identified via differences in terminology in each of the languages or even within a country. The most modern and inclusive terms associated with CH since the European Year of Cultural Heritage 2017 are still not sufficiently mainstreamed in some countries. Such national differences are further reflected in the correlates of the likelihood of expressing agreement or disagreement with the survey statements about the impact of CH on different dimensions of SWB.

From our analysis we can conclude that there is **evidence of a positive relationship between participation in CH and specific attitudes or perceptions**, which deserves specific attention in further analyses of the relation between heritage and societal well-being. Experiences acquired from different forms and intensity of engagement make individuals more aware of the potential of CH in delivering positive societal effects, while not excluding potentially negative impacts (this is discussed further in Chapter 6).

## 6 Controversies: a focus on contested and neglected heritage

### Key findings

- Cultural heritage is not sacrosanct, not least because its background is increasingly under public scrutiny and its meaning can change over time – as shown in responses to the HERIWELL population survey.
- Values of CH objects and traditions are sometimes contested, whether in the context of analysing, and drawing conclusions about, historical burdens (e.g. colonialism) or because of political conflicts and contemporary human rights concerns.
- Negative influences on SWB can also result from serious neglect or even from the destruction of CH. Its protection and valorisation depend on political or societal choices, and appropriate conservation rules or restoration practices, which are not always in place.
- Remedies to address conflicts or neglect are, inter alia, public debates and stakeholder campaigns, transitional justice policies (including the restitution of objects) and improved efforts towards safeguarding and communicating CH values.

The study explores issues and cases of contested or dissonant and severely neglected CH in European regions. This is a response to proposals that emerged in online seminars and discussions with ESPON experts and HERIWELL partners, as well as considering recent incidents such as anti-colonialist debates and actions. Clearly, highlighting well-being impacts of cultural heritage in the HERIWELL study also requires examination of **potential ‘bad-being’ effects of CH** for specific groups or a majority. These include cases where key European values are at stake.

This chapter tries to address such challenges via three methodological approaches (for additional details see Annex VI):

- examining the literature, previous studies and more hands-on strategies regarding problematic – i.e. contested or dissonant and severely neglected – cultural heritage;
- assessing cases currently discussed in European countries or regions, which have been collected by the HERIWELL experts and integrated with suggestions of cultural heritage stakeholders;
- analysing some of the results of the HERIWELL population survey (Chapter 5), especially aspects that concern the potentially changing meaning of CH over time.

### 6.1 Background

When considering contested or neglected CH in European regions, a number of long-discussed cases can be recalled. These include, but not limited to:

- toppled or damaged statues of colonialist heroes in Belgium and the UK;
- Franco's ‘Valle de los Caidos’ memorial built by prisoners in Spain;
- the unclear provenance of objects in European museums;
- conflicts around Soviet monuments in the Baltic States;
- cultural traditions excluding women or migrants;
- restoration works blocked by economic or political interests;
- looted sites in occupied Cyprus;
- restitution issues regarding artworks seized by Nazis in Austria, Germany and the Netherlands;
- debates on ‘Fascist architecture’ in Italy.

The **dissonant history of Europe**, marked by the stigma of two world wars, genocide, colonialism and communism, explains why a prominent part of the corpus of research on the topic has considered European

cases.<sup>71</sup> The war of Russia against Ukraine which included, in the spring of 2022, the destruction of CH<sup>72</sup> adds to that grim picture and raises important legal and political questions.<sup>73</sup> The changing images of cultural heritage and the expansion of its boundaries have contributed to its increasing importance for European societies. Cultural policies and international treaties such as the *Faro Convention* of the CoE have recognised the importance of heritage communities (a ‘shift in focus from monuments to people’). This has led to an extension of stakeholder involvement and participatory governance practices. Contestation is related to old and new stakeholders as well as to changes of power and legitimacy through time and space, leading to **discrepancy** and **incongruity**.<sup>74</sup> Discussions about the values of cultural heritage (intrinsic and instrumental) and the sustainability of heritage along different dimensions have triggered processes of heritage contestation.<sup>75</sup>

The potential of cultural heritage to deliver societal impact by **raising awareness about the sometimes hidden collective memory and related conflicts** should not be looked at with only negative connotations. It may in fact contribute to the well-being of specific communities, though this is not always achieved in a non-controversial way. There are social debates about whether it can really achieve ‘hails of hurts’.<sup>76</sup> Recent research has explored the persistent effects of cultural interventions (in museums, memorials and exhibitions) as **symbolic transitional justice policies** in shaping citizens’ attitudes.<sup>77</sup> By gaining access to these difficult heritage experiences, visitors are said to achieve some ‘talismanic pedagogic historical consciousness’<sup>78</sup>. Alternatively, vicarious experiences, emotional appeals or witness testimonials have been found to persuade visitors to reflect and change their attitudes.

European and international collaboration among dissonant heritage sites has recently improved, including under the auspices of ICOMOS.<sup>79</sup> *Sites of conscience*, as they are sometimes called, have started to collaborate internationally to better ‘enable their visitors to make connections between the past and related contemporary human rights issues’.<sup>80</sup>

Clearly, such impacts cannot be taken for granted and some of these initiatives are quite recent or only of a temporary nature. Nevertheless, the introduction of **reflective practices** by which collective identities are confronted with a troubling past and contemporary societal problems, is increasingly becoming central in the social impact mission of cultural heritage institutions.

Among frequently discussed forms of contested – or ambivalent, dissonant, controversial – CH is the **architecture and monuments created during totalitarian and autocratic regimes**. Between 1920 and 1980, examples of this type of TCH impacted on the urban and rural landscape in many parts of Europe. Examples are during Fascism in Italy and Spain, National Socialism in Germany and Austria, or in occupied countries as well as in the territories of socialist or communist regimes in Central and Eastern Europe. Many conferences have dealt with the political background, architectural concepts, aesthetical features and

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<sup>71</sup> Liu Y, Dupre K, and Jin X (2021) A systematic review of literature on contested heritage. *Current Issues in Tourism* 24(4): 442–465.

<sup>72</sup> <https://mkip.notion.site/mkip/e9a4dfe6aa284de38673efedbe147b51?v=f43ac8780f2543a18f5c8f45afdce5f7>

<sup>73</sup> Chainoglou K (2021) Attacks on tangible and intangible cultural heritage: Human rights violations, violations of international cultural heritage law or a threat to international peace and security? In: Niglio O and Lee EYJ (eds) *Transcultural Diplomacy and International Law in Heritage Conservation*. Singapore: Springer Nature.

<sup>74</sup> Tunbridge JE and Ashworth GJ (1996) *Dissonant heritage: The management of the past as a resource in conflict*. Brisbane: Wiley.

<sup>75</sup> Johnson L (2014) Renegotiating dissonant heritage: The statue of JP Coen. *International Journal of Heritage Studies* 20(6): 583–598.

<sup>76</sup> Reynolds C and Blair W (2018) Museums and ‘difficult pasts’: Northern Ireland’s 1968. *Museum International* 70(3–4): 12–25.

<sup>77</sup> Balcells L, Palanza, V and Voytas E (2022) Do transitional justice museums persuade visitors? Evidence from a field experiment. *The Journal of Politics* 84(1).

<sup>78</sup> Macdonald S (2010) *Difficult heritage: Negotiating the Nazi past in Nuremberg and beyond*. Abingdon and New York: Routledge.

<sup>79</sup> For example at the ICOMOS conference *In Restauro*, held 22–23 July 2021 in Kazanlak (Bulgaria); cf. the programme on [https://www.icomos.de/icomos/pdf/in-restauro\\_en.pdf](https://www.icomos.de/icomos/pdf/in-restauro_en.pdf)

<sup>80</sup> <https://www.sitesofconscience.org/en/who-we-are/about-us/>

ideological roots of ‘totalitarian architecture’.<sup>81</sup> The literature also stresses management issues of dissonant CH sites or their ‘adaptive reuse’ and, more generally, the ‘conflicts and disharmonies that inevitably occur as a result of the relationship between the past and its contemporary users’<sup>82</sup>.

The *ATRIUM project* (Architecture of Totalitarian Regimes in Europe’s Urban Memory) identified 71 buildings, sites, cityscapes or monuments in that greater European region. This was based on research and collaborative assessments carried out by 18 partner institutions from 11 countries in the context of the EU Transnational Co-operation Programme ‘South-East Europe’ (2007–2013). Among the original intentions of the ATRIUM project had been to re-valorise such contested sites – especially via establishing new touristic attention for them – and to pave the way for an ATRIUM Cultural Route of the CoE. The latter goal was achieved in 2014 with a more limited number of sites in Italy, Romania, Bulgaria, Croatia and Albania.<sup>83</sup>

Ambivalent heritage poses **representational difficulties**,<sup>84</sup> and **contemporary artistic interventions as a potential remedy** against undesirable effects of dissonant buildings or monuments inherited from totalitarian times have frequently been tried out. Countries involved have been Austria, the Baltic States<sup>85</sup> and Germany<sup>86</sup>; as experienced in Germany, they can contribute to public debates about this type of TCH. However, they may sometimes create additional conflicts, including with laws or regulations for the protection of monuments.<sup>87</sup> Contemporary interventions intending to change perspectives and overcome an established heritage discourse – perceived by some as ‘dominant’ or authoritative – do not necessarily solve deep rifts between communities, but artistic creativity may help to lessen ideological conflicts and to transgress entrenched positions.

The H2020-funded TRACES Project conducted research on artistic practices of contemporary artists’



interventions of difficult tangible and intangible heritage. This involved which objects and stories can be classified as such and how they are transmitted and reflected in the European culturescapes. The interventions and exhibitions focused on various relevant and often sensitive themes: post-colonialism, the Holocaust and neglected Jewish presence in Europe, the repercussions of European nationalisation policies and so-called population exchanges in the 20th century, and the multilingual diversity in European border regions and urban centres.

Image from the exhibition ‘Awkward Objects of Genocide’ – Centre for Memory Studies, Kraków. TRACES Project

As regards **seriously neglected buildings, monuments and other heritage sites**, the *Seven Most Endangered programme* receives much public attention and political support, as well as financial means. It identifies important sites in need of help and tries to mobilise partners to assist in safeguarding, restoring or financially sustaining these examples of tangible CH in Europe. It is carried out by *Europa Nostra* in collaboration with the *European Investment Bank Institute* and the *Council of Europe Development Bank* and is supported by the Creative Europe programme of the EU. An international advisory panel of specialists

<sup>81</sup> See, for example, Binnewerg A (2012) Conference Report: *Umstrittene Denkmale / Monumenti controversi. Der Umgang mit dem Erbe der Diktaturen / Come gestire l’eredità delle dittature*, 19–22 September 2012 Bozen/Bolzano, in: H-Soz-Kult, 24 November 2012 <[www.hsozkult.de/conferencereport/id/tagungsberichte-4497](http://www.hsozkult.de/conferencereport/id/tagungsberichte-4497)> or, more recently, the European Online Forum *Integrated Approaches to the Dissonant Heritage in Europe: Insights, Networks and Future Perspectives*, organised on 16–17 February 2022 by the German Federal Ministry for Housing, Urban Development and Building and the Federal Research Institute BBSR in connection with EU’s Urban Agenda, cf. the orientation paper of Petra Potz and Nils Scheffler for this conference on [https://www.bbsr.bund.de/BBSR/EN/research/programs/ExWoSt/FieldsOfResearch/dissonant-heritage/orientation-paper.pdf?\\_\\_blob=publicationFile&v=2](https://www.bbsr.bund.de/BBSR/EN/research/programs/ExWoSt/FieldsOfResearch/dissonant-heritage/orientation-paper.pdf?__blob=publicationFile&v=2).

<sup>82</sup> Tunbridge JE and Ashworth GJ (1996) *Dissonant Heritage: The Management of the Past as a Resource in Conflict*. Chichester: Wiley; cf. also Nora P (1989) Between memory and history: Les lieux de mémoire. *Representations* 26: 7–25.

<sup>83</sup> <https://www.atriumroute.eu/about-us/chi-siamo>

<sup>84</sup> Macdonald S (2015) Is ‘difficult heritage’ still ‘difficult’? Why public acknowledgment of past perpetration may no longer be so unsettling to collective identities. *Museum International* 67(1–4): 6–22.

<sup>85</sup> Goštautaitė R (2020) Dissonant Soviet monuments in post-Soviet Lithuania – The application of artistic practices. *Baltic Worlds* 4/2020: 9–19.

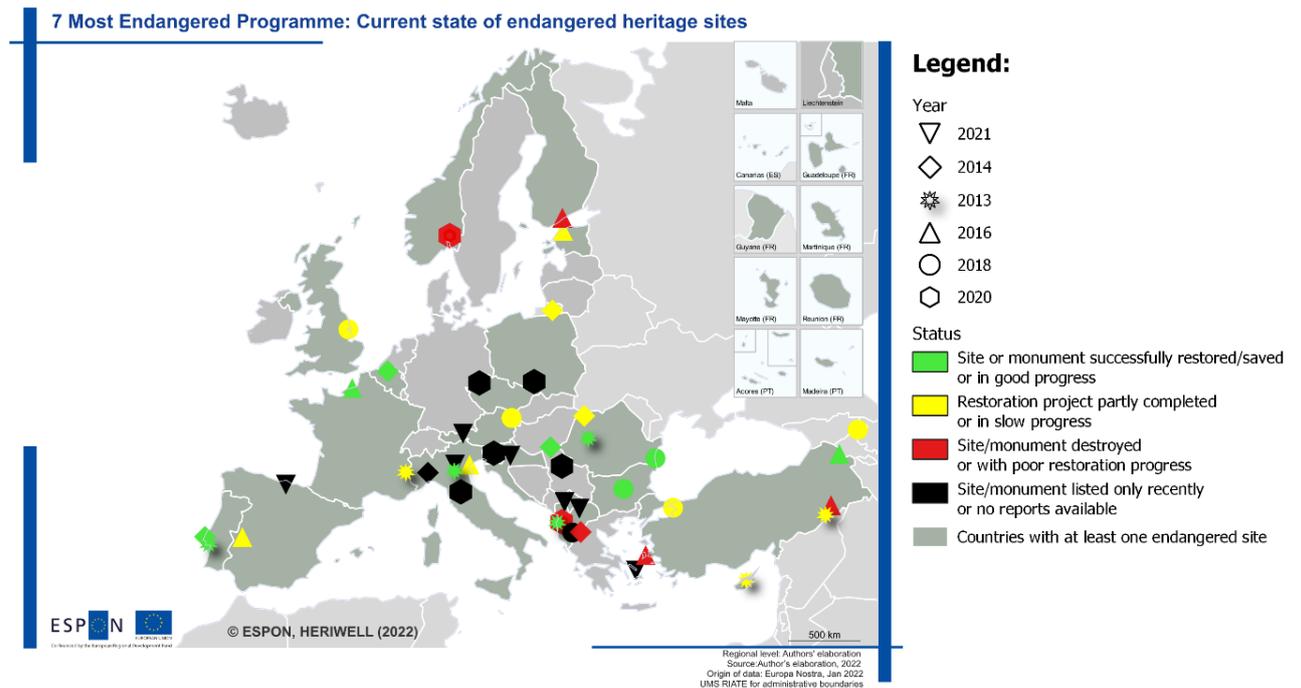
<sup>86</sup> <http://www.tracesproject.eu/download/4329/index.html.pdf>

<sup>87</sup> As shown in the TV documentary ‘Propaganda aus Stein’, 3sat 21 August 2021.

in history, archaeology, architecture, conservation and finance evaluates and shortlists applications. The final list of normally seven endangered sites per year is selected by the Board of Europa Nostra. Between 2013 and 2021, 43 threatened monuments and heritage sites from 26 countries were selected and are published on a special website<sup>88</sup>.

As shown on Map 6.1, efforts made in the context of this programme have been partly successful: a number of sites are on the way to being saved or restored (marked green). In other cases the restoration process is slower (yellow) or has failed altogether (red). More recent inscriptions, where the progress cannot yet be measured, are marked in black. Additional information about the sites selected by the programme can be found in Annex VI.

### Map 6.1. Most Endangered Programme: Current state of heritage sites at risk



Source: HERIWELL Consortium based on Europa Nostra information

Contemporary creativity can also revitalise these neglected sites which, in turn, stimulate contemporary creators. As shown in the HERIWELL case study for Spain, the project *Arquitecturas de la Memoria* was inspired by the Monastery of San Francisco in Garrovillas de Alconétar (identified by the yellow triangle in Spain, close to the Portuguese border).

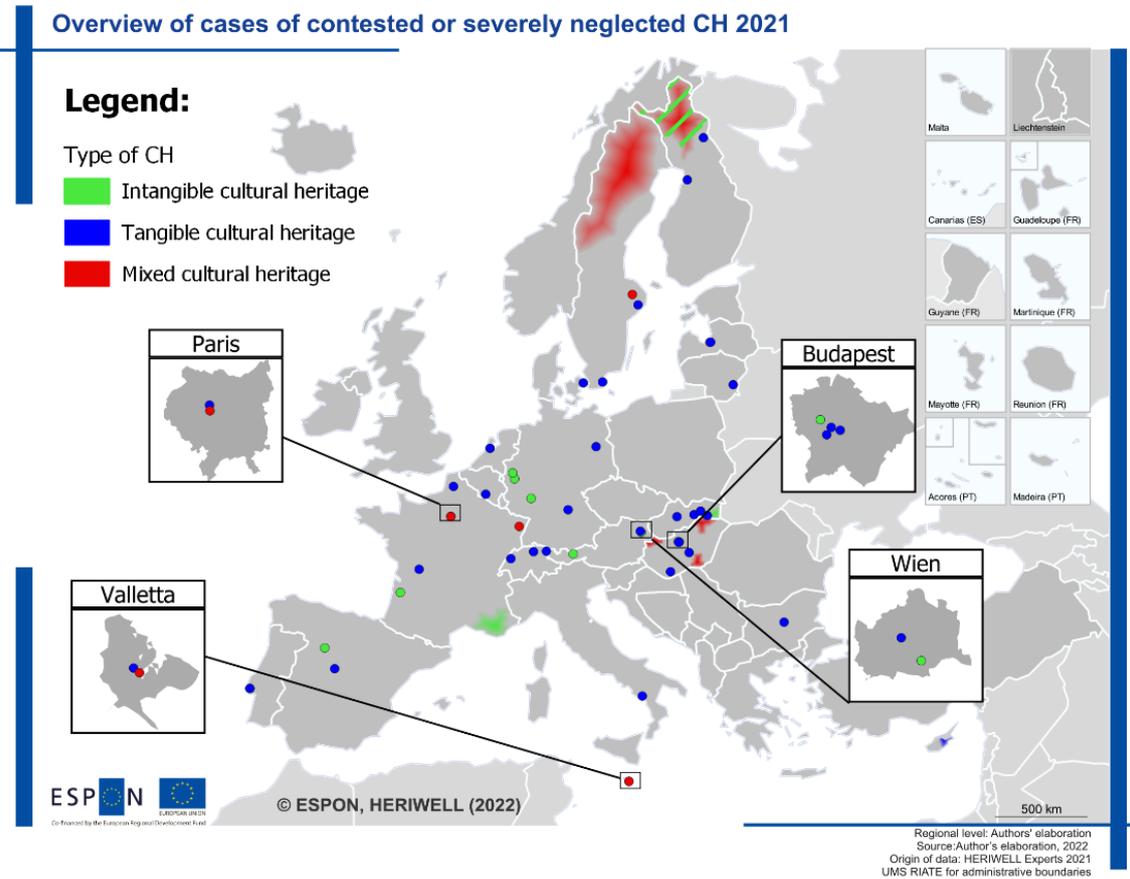
## 6.2 The HERIWELL contested heritage mapping

For a realistic mapping of important recent debates and incidents, efforts have been made to complement the existing evidence from the literature and the Internet. This has produced a collection and systematic assessment of examples of CH-related contested CH cases or forms of neglect, as well as of their impacts and potential remedies. To identify such cases a survey was carried out among the HERIWELL country experts (see Annex VI) and integrated with suggestions from cultural heritage stakeholders. Given the complexity of the matter, the survey focused on **examples of currently more discussed cases** in different European regions. According to a two-thirds majority of the experts, the reported cases are of national relevance, i.e. similar examples can be found in their country. This suggests that widespread CH neglect, social problems or national traumata could hide behind many of the individual cases.

<sup>88</sup> <https://7mostendangered.eu>

The case collection took place in the autumn of 2021, and 47 answers from 18 countries were received. The examples mentioned by the experts are shown in Map 6.2 – more about the reported issues and other details can be found in Annex VI.

### Map 6.2. Overview of contested or severely neglected CH cases, 2021



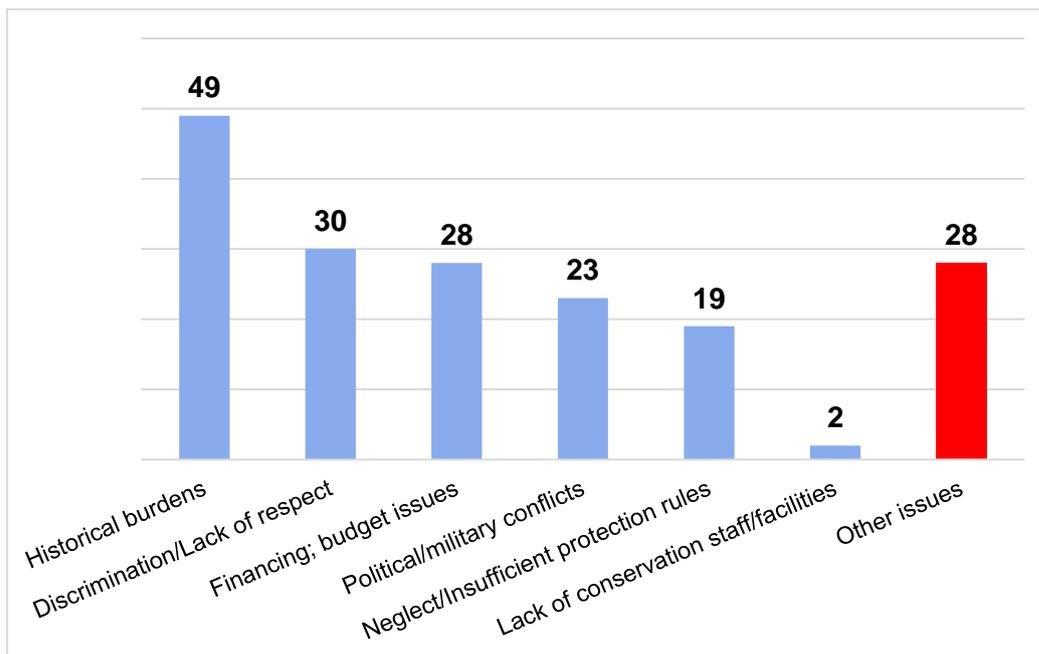
Source: HERIWELL Consortium based on the survey to HERIWELL country experts and consultation with heritage stakeholders, January 2022

Note: the large coloured areas in the north of FI and SE refer to settlement areas of the Sámi minority.

The expert responses show that in the majority of cases (31), **conflicts around TCH** are in the focus, be it controversial monuments or sites, contested museums objects or buildings in precarious condition. **ICH and mixed CH** examples are mentioned less frequently (in eight cases each).

Turning to the main issues of contested heritage and their SWB effects, Figures 6.1 to 6.4 can help to investigate further the examples provided by the experts. This starts with the **main issues** connected with the reported cases.

**Figure 6.1. Main issues of contested or neglected CH cases (%)**

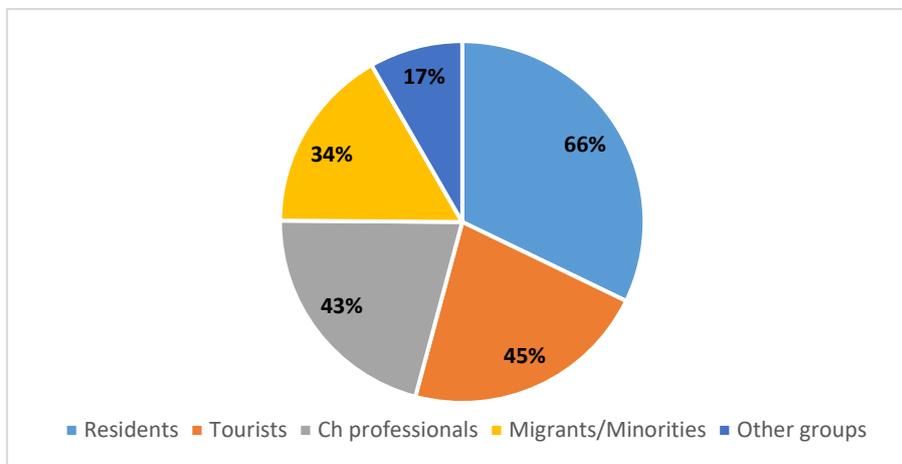


Source: HERIWELL Consortium based on the survey to HERIWELL country experts and consultation with heritage stakeholders, January 2022 (multiple choice answers)

As regards the background of contested or severely neglected CH, **historical burdens** (including for example subsequent restitution claims or debates) are relevant in nearly half of the reported examples. Next are cases relating to the open or hidden **discrimination** of social groups or the **lack of respect for minorities' CH** (14 cases, four of them involving the indigenous Sámi minority in Northern Europe). Following this is **financing/budgetary issues** (13), **political or military conflicts**, originating mostly in the last century (11) and the more or less wilful **neglect of CH**, caused by insufficient CH protection rules (9). In contrast, a **lack of conservation specialists or facilities** was reported by just one of the experts. The 13 responses mentioning **other issues** includes many different problems such as controversies concerning international agreements (e.g. the 'Venice Charter') and their meaning for contemporary urban spaces and planning. Other issues include a suggested preference of local politicians for new apartments over historical buildings, or aggravated relations with Russia and Turkey, and many more.

Identifying the main **CH stakeholders** has been an important goal of the HERIWELL project. As could be expected, Figure 6.2 shows that residents are the largest group among the main societal groups that are negatively affected by contested or neglected CH, followed by tourists and cultural professionals. However, migrants and minorities also play an important role in this respect.

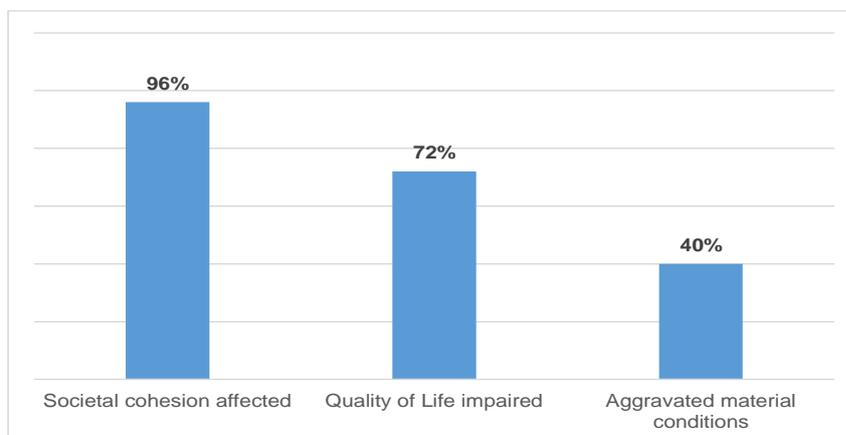
**Figure 6.2. Negatively affected societal groups/stakeholders (HERIWELL categories)**



Source: HERIWELL Consortium based on the survey to HERIWELL country experts and consultation with heritage stakeholders, January 2022 (multiple choice answers)

Figure 6.3 resumes the negative effects of contested or neglected CH in a more aggregated format that leads to the three main HERIWELL categories of societal well-being. It is based on the 18 indicators checked for each case in the questionnaire. The result shows the dominant role of **societal cohesion** for SWB, being it is negatively affected in nearly all cases. This is followed by the **quality of life** of main stakeholders, while **material conditions** play a less significant, but still important, role in 40 % of the analysed cases.

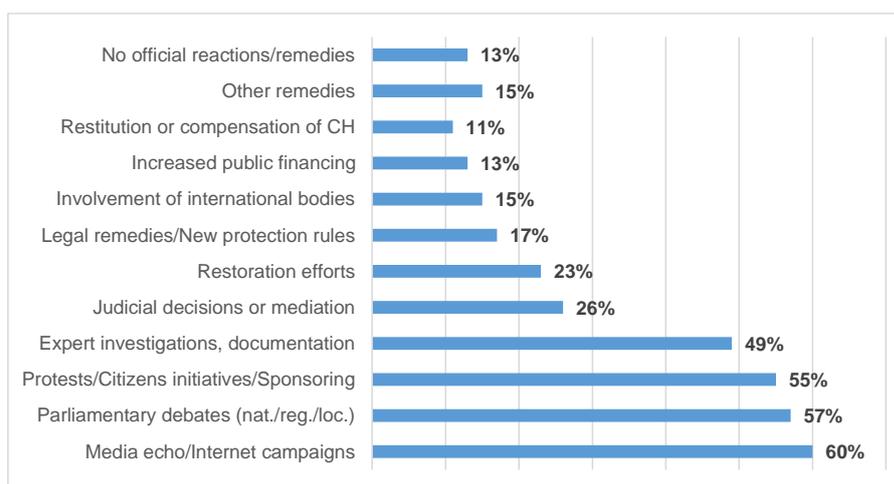
**Figure 6.3. Negative effects of relevance for SWB (main HERIWELL categories)**



Source: HERIWELL Consortium based on the survey to HERIWELL country experts and consultation with heritage stakeholders, January 2022 (multiple choice answers)

The responses of the HERIWELL experts report the main strategies and actions that are in place or planned to counteract the concerns and problems caused by contested or seriously neglected CH. Figure 6.4 shows that in the reported cases, the road towards remedies usually goes via **media campaigns, stakeholder protests, private sponsoring or experts' advice**, frequently accompanied by **parliamentary debates** on different territorial levels. More concrete measures such as **judicial and other legal action, restoration efforts, increased financing or restitutions** range only score between 11 % and 26 % of the cases. **No official reactions** account for 13 %. On the one hand, these results may in part be due to the explicit request for currently debated, controversial CH cases; on the other hand, opposed positions among CH stakeholders, governments and the public at large may also play a role.

**Figure 6.4. Measures or remedies to address the problems (in place or planned).**



Source: HERIWELL Consortium based on the survey to HERIWELL country experts and consultation with heritage stakeholders, January 2022 (multiple choice answers)

### 6.3 Controversial effects of heritage resulting from the HERIWELL population survey

The discrepancy and incongruences resulting from opposing CH interpretations of stakeholders and the wider public also emerged in the answers to some questions on perceptions of heritage placed in the HERIWELL population survey. We can identify, at least, three conflicting areas in this respect (for more details see Chapter 5 of this report).

The first one concerns the effects of the **exploitation of cultural heritage** which can increase the economic activity and occupational chances in a given region, thanks to, for example, cultural tourism. However, unwanted effects can in turn challenge the very existence or sustainability of CH itself. For example, the access of heritage communities may be restricted due to congestion, gentrification and rising costs fuelled by **'over-tourism'**.<sup>89</sup> In total, about half of the population in the eight surveyed countries is aware of related problems for residents in heritage-rich environments. In addition, over 60% of the respondents even perceive dangers to CH itself caused by large numbers of tourists.

#### Box 6.1. 'Over-tourism' in Lisbon

Complaints of journalist Ana Rita Guerra, *Dinheiro Vivo*, 6 August 2019: 'It's undeniable that Lisbon has been gripped by a tourist boom that is defacing the city. As with all cities that turn into travel agencies, the infrastructure has changed to accommodate foreigners rather than the local inhabitants. The cosiness of life in Lisbon has been replaced by a caricature for tourists, and I have finally realised what it's like to feel out of place in a city that used to be my own.'

Source: Rita Guerra, *Dinheiro Vivo*, 6 August 2019

<sup>89</sup> Frey BS (2021) *Overcoming Overtourism: Creating Revived Originals*. Cham: Springer, pp. 29–41).

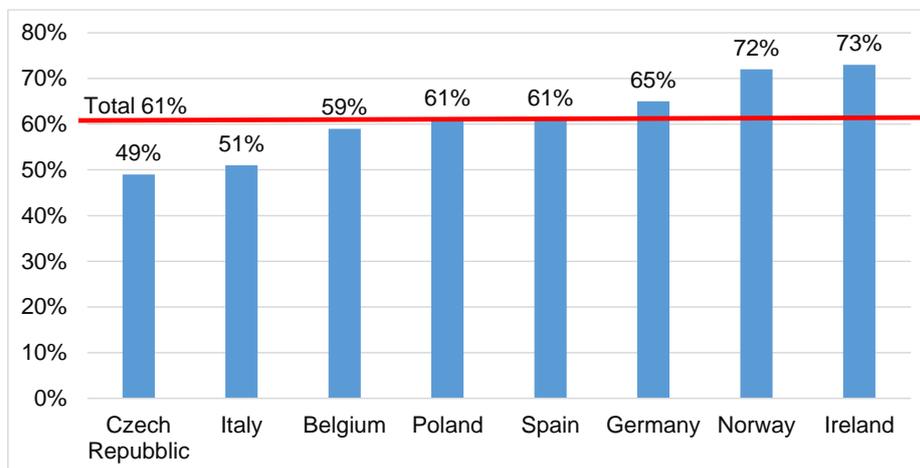
The second potential conflict refers to **the capacity (or not) of CH to integrate migrants or minorities** and as could be seen in the last section, this capacity is not self-evident. A number of conflicts, such as those with the Sámi minority in Northern Europe, originate from unsettled disputes about the tangible, intangible and natural heritage in specific regions. In the population survey, questions relating to these problems show uneven positions in large sections of the population. As discussed in Chapter 5.4, on the one hand, almost three-quarters of the respondents (73 %) consider sharing a diverse CH as a chance for a better integration of migrants or minorities. On the other hand, close to half of them (45 %) fear that ‘some cultural traditions can create conflicts or hinder the integration of migrants’. This underlines the need for mutual openness both in minority and majority groups, as well as related educational efforts.

The last issue concerns **the changing meanings of heritage**. Here, the perception of the potentially contested nature of cultural heritage is directly addressed in the survey. The agreement (or not) with the following statement in the survey can be interpreted as personal awareness of this problem:

*The meaning of cultural heritage can change over time. For example, a monument that used to be cherished can later be contested or may have to be reconsidered or even removed.*

In order to better highlight the main responses to this statement, figure 6.5 presents only the positive answers (agree either totally or partially) while the ‘do not know’ responses are disregarded here (in all eight countries the latter account for 13 % of all respondents, largest in Norway with 21 %).

**Figure 6.5. The meaning of CH can change over time (positive responses)**



Source: HERIWELL population survey 2021 (N = 8,818 respondents; field work: YouGov)

The countries with the largest proportion of the population agreeing with the statement are Spain, Germany, Norway and Ireland (61 %, 65 %, 72 % and 73 % of responses, respectively). Respondents in the Czech Republic respond almost evenly to agree (49 %) and disagree (51 %); this is the country where fewer respondents voiced the most extreme opinions of totally agreeing or totally disagreeing (adding up to 27 % of all responses). The distribution of responses of ‘totally agree’ could be interpreted as an index of how contentious the question is in each of the countries. Spain (39 %) and Belgium (37 %), Norway (36 %), and Germany (35 %) are the countries where more respondents with an opinion are either in the totally agree or in the totally disagree position. As shown in Chapter 5.4 and related data provided in Annex V, especially younger respondents from Italy, the Czech Republic, Poland, Germany, Ireland, Norway and Spain tend to agree with this statement.

## 6.4 Conclusions

Many of the ambivalent cases collected by the HERIWELL experts, as well as the divergent answers given in the HERIWELL population survey, underline the constantly changing nature and interpretation of cultural heritage. This calls for **multi-perspective and, at the same time, integrated approaches to dissonant or seriously neglected CH**. Nevertheless, related experiences and learning processes have the potential to trigger the interpretation of past and contemporary issues in the light of human rights and European values.

To that effect, heritage institutions increasingly claim their societal relevance by **addressing dissonant events and memories via multidirectional approaches**, now often comprising the collective agency and

activism of social or cultural initiatives. In her studies on heritage research and innovative curatorial practices, Sharon Macdonald comments: 'There is little doubt that heritage-making does often involve social side-lining and hierarchies of the heritageable.'<sup>90</sup> **Protests**, now often in social media bubbles, against perceived discriminations or one-sided presentations of national, European or World cultural – and political heritage can thus be expected and claim legitimacy. However, there are some **caveats** to be considered, especially in heritage-driven campaigns and in related curatorial work, including 'gamification' apps or 'identity' calls and other collective political or legal positions. To avoid colliding with freedom of expression and the human rights of others, with the traumata of victims and their relatives, as well as with European cultural diversity goals, balanced approaches can be suggested in some cases.<sup>91</sup> It can also be assumed that a total dismissal of cultural traditions or artistic and architectural works from the past are based on sometimes 'undigested', possibly even short-lived contemporary convictions. This is based on the experience gained in many of the contested cases, but it could not only contradict national protection laws and international CH treaties, but block individual and societal learning processes.

Experts in art history, museology, archaeology and other heritage-related scientific disciplines have started, over the past few decades, to pave the way for more informed and multi-perspective discourses. Excerpts from a very recent empirical study (Pötz and Scheffler, 2022) are included in Annex VI and complement the findings in this report. Especially since the *Washington Conference on Holocaust-Era Assets* 1998<sup>92</sup>, we can also see the emergence of partly institutionalised, research and decision-making on the **provenance and lawful ownership of TCH objects**. More efforts in that direction are however required, as evidenced by the recent debates concerning a restitution of the 'Benin Bronzes' – with split opinions among heritage specialists across Europe<sup>93</sup> – or the contested provenance of artworks of the famous 'Sammlung Bührle' in Zurich<sup>94</sup>.

The HERIWELL case study on Sámi CH in Norway shows how such issues can be settled peacefully, based on the inclusion of all stakeholders as well as preparatory research, educational efforts<sup>95</sup>. It also needs the willingness of a government to act accordingly in a mediation and partial restitution process.<sup>96</sup> Adding to more promising conclusions are joint, and partly successful, efforts to save or recover severely neglected CH monuments and sites. These are often supported by citizens' initiatives, media campaigns, legal action or institutional programmes such as *Seven Most Endangered* (Europa Nostra and partners).

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<sup>90</sup> Macdonald S (2019) Heritage traces, differences, and futures: New research approaches to heritage and society. In: Kusek R and Purchla J (eds) *Heritage and Society*. Krakow: International Cultural Centre, p. 41.

<sup>91</sup> Donders Y (2016) Cultural diversity and cultural identity in human rights. In: Wiesand AJ, Chainoglou, K, Śledzińska-Simon A and Donders Y (eds) *Culture and Human Rights: The Wrocław Commentaries* Berlin/Boson/Cologne: De Gruyter, pp. 23–32.

<sup>92</sup> Department of State (1999) *Washington Conference on Holocaust-Era Assets*, edited by J D Bindenagel, Washington D.C.

<sup>93</sup> Oltermann P (2021) Berlin's plan to return Benin bronzes piles pressure on UK museums. *The Guardian* 31 March 2021.

<sup>94</sup> <https://www.srf.ch/kultur/kunst/provenienzforschung-der-streit-um-die-buehrle-sammlung-das-muessen-sie-wissen>

<sup>95</sup> Guttorm G (2012) Paradigm shift in the view of duodji in the 21st century: Higher education in duodji. *WINHEC: International Journal of Indigenous Education Scholarship* 1: 68–82.

<sup>96</sup> Norwegian Ministry of Local Government and Modernisation (2020) *Fifth Periodic Report – The Framework Convention for the Protection of National Minorities*, Strasbourg: Council of Europe. Restitution processes, especially of African works of art looted during the colonial era, have also been started by other European countries e.g. France and Germany.

## 7 Cultural heritage and societal well-being at the local level: a transversal analysis of the HERIWELL case studies

### Key findings

- Cultural heritage, in all its forms, contributes positively to all dimensions and sub-dimensions of well-being in the analysed cases. Different typologies of cultural heritage contribute to well-being in a strongly interconnected way and the effects of cultural heritage on societal well-being sub-dimensions are mutually dependent.
- In the analysed cases, cultural heritage contributes particularly to the following sub-dimensions of well-being: education and skills, including digitisation; place identity, symbolic representation and community awareness, civic cohesion and sense of belonging; jobs, earnings and business development.
- There is a bidirectional relation between participation in cultural heritage and societal well-being.
- Cultural heritage also has negative effects on well-being, especially when not valorised in a sustainable way, from both an environmental and a social point of view.
- To produce impacts on societal well-being, cultural heritage needs to be accessible and accessed by people. Therefore, the effects of cultural heritage on societal well-being depend on the existence of a specific valorisation strategy that capitalises its societal well-being potential and makes heritage both accessible to people and accessed by people.
- Participation in cultural heritage depends on its accessibility, the sense of ownership and identification with cultural heritage of citizens engaged in it, and the overall level of recognition of the value of cultural heritage for individual and societal well-being.
- Cultural heritage narratives and the way they are framed are particularly relevant in framing the perceptions on the societal well-being value of cultural heritage.
- Effects of cultural heritage are favoured by a series of social mechanisms: emotions; pride; amusement; entertainment; repeated interactions; certification; bandwagon; self-efficacy; performance feedback; financial incentives; salience.

### 7.1 Background and methodology

To better understand the multifaceted nature of the linkages between cultural heritage and the different societal well-being dimensions and sub-dimensions, the HERIWELL Consortium has conducted eight case studies.

The HERIWELL case studies aim to assess how CH can contribute to SWB and which mechanisms and policy strategies support this interplay, to produce knowledge for policymakers interested in fostering societal well-being through cultural heritage.

#### 7.1.1 Methodology

The **unit of analysis** of case studies are **exemplary practices** (programmes, policies and projects), focused on a cultural heritage resource in one of the selected European countries, deemed to contribute to different types of societal well-being. The focus on exemplary practices allows an identification of strategies that contribute to societal well-being results and to explore the *reasons why* these results occurred.

In order to select exemplary practices, the following criteria have been used:

- experiences located in one of the eight countries selected for the HERIWELL population survey, i.e. Czechia, Belgium, Germany, Norway, Ireland, Italy, Poland and Spain;
- experiences focusing on various forms of CH, offering a strong connection with one or more of the identified dimensions of SWB;
- experiences that already offer a relevant evidence to be analysed;
- variety among the types of policies promoted and the targeted population.

The selected eight exemplary practices are the following:

- BE: *ECoC Mons 2015: Long-term vision and strategy for cultural heritage (hereafter BE case)*, focused on understanding the contribution of CH investments made in the context of ECoC Mons 2015 to societal well-being;
- CZ: *The Czech Blueprint Handicraft (hereafter CZ case)*, focused on assessing the contribution of intangible heritage (blueprint) to societal well-being;
- DE: *Weimar memories (hereafter DE case)*, focused on understanding the CH valorisation processes activated by the design of specific CH narratives and their linkages with societal well-being;
- ES: *Arquitectura de la Memoria (hereafter ES case)*, focused on the analysis of the relation between very deteriorated TCH (a monastery) and contemporary creation as well as on the linkages between TCH, ICH and digital CH used in the project with societal well-being;
- IE: *Village Design Statement and Collaborative Town Centre Health Check programmes (hereafter IE case)*, focused on shedding light on how CH (both TCH and ICH) can be used to drive local regeneration strategies and their outcomes in terms of societal well-being;
- IT: *Mann Pilot case study (hereafter IT case)*, focused on deepening understanding on the use of digital CH to unlock the societal well-being potential of CH;
- NO: *Sámi cultural institutions as a source of societal well-being in Norway (hereafter NO case)*, focused on providing understanding on how the restitution of CH to the Sámi people contributed to societal well-being in the regions where restitution occurred;
- PL: *How heritage changes environment and communities: Podgórze Museum in Kraków (hereafter PL case)*, focused on providing understanding on how museums can contribute to societal well-being of local communities.

Further details on the selected case studies are described in Annex VII.

Three main **questions have guided the drafting of case studies**:

- What kind of changes in the SWB dimensions can be detected related to the CH considered in the case study? How can it be measured?
- Why and how have the achieved changes been generated?
- What policy strategies have been adopted to valorise the CH and how have these strategies affected the effects of CH on SWB?

Following these guiding questions, case studies include two main parts:

- The **first part** refers to the **identification of the contribution of relevant cultural heritage-related interventions to the different dimensions of SWB in the considered territory**. The analysis and quantification of impacts has been undertaken through qualitative (e.g. desk analysis of the official and unofficial documents, interviews, focus groups, workshops, content analysis), quantitative (e.g. surveys) and big data (e.g. sentiment analysis of Facebook, Instagram, Twitter, Wikipedia) methods and tools, according to the specificities of each case.
- The **second part** refers to the **identification**, based on an extrapolation approach, of the **elements or mechanisms** of the case study that are **conducive to the results and impacts achieved**. Extrapolation is used when actors believe that replicating models in other contexts will not generate the same effects due to differences in contextual factors. Under an extrapolation-based design, this problem is overcome by the identification of locally feasible factors that purposely activate a causal process as the one occurred in the exemplary practice. This implies that actors will not replicate the entire exemplary practice model, but only those factors that made it function. This method derives from the realist approach to evaluation proposed by Pawson<sup>97</sup>.

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<sup>97</sup> Pawson R and Tilley N (1997) *Realistic Evaluation*. London: Sage.

Case studies were conducted through a **participatory approach**, i.e. inclusion of all actors' perspectives in the analysis through interviews and focus groups, Validation workshops were held in all case studies but for DE and NO, where stakeholders provided a written feedback. There was a high participation of BE stakeholders in the workshop organised to discuss the results of investments in cultural heritage in ECoC, including ECoC Mons 2015. The BE expert was able to use feedback from this workshop to integrate the ECoC Mons 2015 case study.

Further details on the case study methodology are provided in Annex VII.

## 7.2 Overview of CH valorisation strategies in the HERIWELL case studies

While CH is important per se, having an intrinsic value for communities and individuals, its contribution to societal well-being also depends on the valorisation strategies put in place to unlock its societal well-being potential.

The HERIWELL case studies show that CH valorisation strategies can take various forms, often highly integrated, as shown in Table 7.1.

The main target groups on which the valorisation strategies focus on are: citizens at large (in all cases); tourists (BE, DE, CZ, NO, IE); children and youth (BE, IT, PL, NO, CZ, ES); minorities (NO); people at risk of social exclusion (BE, CZ, IT, ES, NO); artists and contemporary creators (ES).

**Table 7.1. CH policies in HERIWELL case studies**

Type of policy	Type of CH	BE	CZ	DE	ES	IE	IT	NO	PL
CH preservation and conservation, including refurbishment of CH	ICH, MCH	√	√	√	√	√	√	√	
Construction of CH infrastructure	TCH	√		√					√
CH participation	TCH, ICH, MCH	√	√	√	√	√	√	√	√
CH accessibility	MCH	√			√		√	√	
CH narratives-building	MCH			√					
Knowledge production and research on CH	MCH, ICH	√						√	
CH digitisation	TCH, MCH, ICH	√			√	√	√	√	
Training and education	TCH, MCH, ICH	√	√		√	√	√	√	√
Social inclusion and cohesion	MCH				√		√		
Restitution of CH	MCH							√	
Territorial regeneration through CH	MCH, TCH					√			√
Trade and marketing, including e-commerce	ICH		√						
Cultural tourism promotion	TCH, ICH, MCH	√	√	√		√		√	

Source: HERIWELL Consortium based on HERIWELL case studies

In the HERIWELL case studies, **strategies to support CH participation** are the **most used** (in 7 out of 8 case studies) **for valorising CH**, having a twofold aim: on the one hand, they encourage the discovery of CH by both residents and tourists, and on the other hand, they actively engage citizens in the planning and implementation of specific CH strategies. While in the former case, citizens and tourists are passive users of specific CH contents (e.g. exhibitions, digital apps, workshops, cultural events) in the latter case citizens, mostly residents, contribute actively to the production of CH contents and its governance and management. This occurs in a context of **increased participatory governance in the CH field** (Sani et al., 2015). In the HERIWELL case studies, participatory interventions take various forms, as shown in Box 7.1.

### Box 7.1. Examples of participatory strategies in HERIWELL case studies

- In the ES case, the community was involved as bearers of traditions, teachers or learners, artisans, carers in all the activities planned by the project and as active participants in the crowdfunding campaign organised by the project.
- In the IE case, citizens were engaged in the planning of the local heritage for territorial regeneration.
- In the PL case, citizens have participated in various ways: involvement in the creation of Podgórze Museum's philosophy and design of its territorial scope; engagement in shaping the narrative of exhibitions; and creation of temporary exhibitions. However, interviewed actors underline that citizens' and local experts' knowledge should be further considered in the planning and implementation of the museum activities.
- In the BE case, the goal of involving citizens in a process of cultural democracy pursued by the strategy was delivered through the engagement of stakeholders, including citizens, in both the planning (e.g. through the Participatory Cultural Council, an informal group of CH stakeholders, including citizens) and implementation of CH interventions (e.g. citizens' engagement in the generation of specific events such as the 'Grand 8').

Source: HERIWELL Consortium based on HERIWELL case studies

**CH preservation and conservation, including refurbishment of CH**, is another relevant strategy delivered in 6 out of the 8 HERIWELL case studies. Preservation and conservation occur in various ways, based also on the type of CH, as detailed in Box 7.2.

### Box 7.2. Examples of CH preservation and conservation strategies in HERIWELL cases

Renovation and refurbishment interventions are mostly used in the case of TCH. For instance, *the BE case* planned specific investments in the refurbishment of CH resources of Mons (e.g. restoration of the Church of Saint Nicolas). Preservation of CH is also put in place using digitisation, in particular in the case of ICH. As pointed out by the *ES case*, digitisation can provide specific opportunities for preserving ICH in the context of increased ageing, migration and depopulation in specific areas (e.g. remote areas, small rural territories). In this case, a specific app was created, archiving the local ICH and integrating it into bigger sound repositories and into creative works. An augmented reality tool was used to gamify the heritage experience. In the *CZ case*, various interventions are used for enhancing the conservation and preservation of ICH: the documentation of ICH; the nomination of specific bearers in the framework of the national programme 'Bearers of the Folk Crafts Tradition'; the creation of a specific public award (i.e. a one-off financial gift) for the support, protection and preservation of traditional crafts; the creation of specific institutions for preserving and supporting the development of folk culture (e.g. Regional Offices for Folk Culture); the delivery of workshops by older masters to learn the basics, gain experience and develop an understanding of the more sophisticated complexities of the blueprint process.

Source: HERIWELL Consortium based on HERIWELL case studies

**Training and education for valorisation strategies** are extensively used in the HERIWELL case studies (6 out of 8 case studies) to enhance skills and knowledge, including on CH, but also to preserve heritage and strengthen local identity.

### Box 7.3. Examples of training and education strategies in HERIWELL cases

In the *BE* case, education is used to both produce knowledge on ICH and strengthen local identity. To achieve these goals an educational kit for teachers and city children was produced. In the *handicraft based on the example of the Czech Blueprint (CZ case)*, education on ICH is used to produce knowledge on handicrafts. In particular, it uses the blueprint through lectures of the blueprint workshop representatives in schools and blueprint courses targeted to academies, and books for children (e.g. Hodonín Gallery of Fine Arts book for children). In the *NO case*, specific educational programmes have been created to preserve Sámi crafts and material production (e.g. duodji<sup>98</sup>), such as, a bachelor's programme in traditional and contemporary duodji, apprenticeships programmes, documentation on Sámi ICH and TCH. In addition, a specific attention has been dedicated to enhancing learning of the Sámi language, through engaging children in the activities that the language is part of, such as reindeer herding, duodji, hunting, fishing and gathering activities, and storytelling of local Sámi histories. In the *PL case*, several educational activities are used to enhance skills and knowledge, to strengthen local identity and to safeguard memory and heritage: museum lessons (e.g. Operation CITY) and museum exhibitions for pre-schoolers, primary and secondary schools; museum lectures on architecture, people and other angles and perspectives of Podgórze's history targeted to the wider public. The Mann museum (*IT case*) has implemented various educational activities to enhance access to the museum collections, such as laboratories for children (3–4 years and 5–12 years) and their families, educational videos for YouTube and comics centred on the archaeological works.

Source: HERIWELL Consortium based on HERIWELL case studies

**CH digitisation** is also particularly used in the HERIWELL case studies (5 out of the 8 cases) with the aim to both increase accessibility of CH and enhance its preservation.

### Box 7.4. Examples of CH digitisation in HERIWELL cases

In HERIWELL cases, digitisation occurs through: apps (e.g. *Arquitecturas de la Memoria in Garrovillas, ES case*); gamification (e.g. *Father and Son in the Mann, IT case*); the creation of specific websites for mapping and documenting CH (e.g. digitalmuseum.no, in the *NO case*) and for communicating with the public (e.g. <https://www.straznickymodrotisk.cz>, in the *CZ case*); the design of digitally connected modular and moveable places in the *BE case* (e.g. Café Europa, a network of digitally connected modular and moveable containers across Europe for revisiting the collective identity). In the *CZ case*, digitisation occurs in particular through e-commerce services regarding the blueprint.

Source: HERIWELL Consortium based on HERIWELL case studies

**Cultural tourism promotion** is another relevant strategy adopted in the HERIWELL case studies (5 out of 8 cases).

### Box 7.5. Examples of cultural tourism promotion in HERIWELL cases

The promotion of cultural tourism is a relevant objective in the *BE and DE cases*. Furthermore, cultural tourism is also part of the valorisation strategies of the blueprint ICH in the *CZ and NO cases*. In the *CZ case*, blueprint workshops provide guided tours, visits to the workshops and practical activities targeted to both residents and tourists. These activities are also part of the offer from travel agencies. In the *NO case*, traditional cultural practices are used to develop sustainable tourism-related initiatives (e.g. a company focuses on showing Sámi traditional activities, reindeer herding, fishing, spending a night in turf huts or a lavvu, a Sámi tent, making use of the museum). In the *IE case*, the pilot CTCHC aimed to develop an innovative town centre-led retail, cultural heritage and tourism baseline.

Source: HERIWELL Consortium based on HERIWELL case studies

**Increasing the accessibility of CH** is particularly important for unlocking the potential of CH to societal well-being. Accessibility strategies are used in half of the HERIWELL cases to enhance access to, and active participation in CH. Accessibility is multifaceted, focusing on the physical, cognitive and economic access to CH. Furthermore, to enhance access to CH, accessibility strategies also focus on the quality of CH

<sup>98</sup> It is a traditional Sámi handicraft that combines functionality with art. It can refer to various types of objects (e.g. clothes or books). For further details see <https://www.norwegiancrafts.no/articles/duodji-as-part-of-philosophy-and-cosmology>

surroundings (e.g. streets, neighbourhoods) to enhance access to CH. Various types of interventions are used to enhance accessibility: renovation of buildings and their adaptation to people with disabilities; adaptation of the CH infrastructure (exhibitions, information panels, etc.) to people with disabilities; refurbishment of surrounding areas (e.g. neighbourhoods); improved transport connections; decentralisation of CH events; use of digital technologies; use of artistic tools (e.g. videos, podcasts) to communicate CH and engage with a specific audience (e.g. youth); openings at nights or during the weekend; use of activities targeted to a specific audience (e.g. children, people with disabilities); free or reduced-price entrance fees.

### Box 7.6. Accessibility strategy in the Mann case study

In the *IT case*, *physical accessibility* has been enhanced through a range of interventions of restoration of the building and renovation of the exhibits, which more than doubled the exhibits area. *Economic accessibility* includes free entrance on specific days, openings at night on specific days and special ticketing for tourists through the Campania regional 'Artecard', and to people living in the surroundings of the museum through the OpenMann card (€12), a special yearly pass dedicated to the. Free ticketing amounts to 50 % of the total visitors. The museum also promoted the quality label 'MANN's friend' awarded to the shops guaranteeing high standards and mutual promotion, to ensure an integrated offer for the growing numbers of visitors to the museum. *Cognitive accessibility* aims at strengthening the social and institutional relations of the museum, and the bottom-up participation. Attention is paid to the *extra moenia* social impact of the museum, with particular regard to the MANN's neighbourhoods characterised by social uneasiness, fostering occasions of socialisation, economic relief for their inhabitants to access culture, and support to people with disabilities. The cognitive strategy foresees specific activities targeted to people with disabilities (e.g. 'The accessible laboratory' targeted to people with visual challenges), specific signage, maps, videos, podcasts, physical and digital installations, videogames.

Source: HERIWELL Consortium based on Mann case study

Other valorisation strategies are used in the HERIWELL case studies even though on a smaller scale:

- **Knowledge production and research on CH** includes various activities: e.g. creation of research centres on CH (Artothèque centre for archiving, researching, restoring and studying the heritage of Mons created within the *ECoC Mons framework*, *BE case*); producing books and other publications on CH (e.g. in Lule Sámi, *NO case*).
- **Social inclusion and cohesion** strategies are used in the *ES case* to enhance local cohesion through the design and delivery of intergenerational dialogues. These involved mediation through contemporary creators of music, visual and performing arts, with the different generations of the community, women and disabled people gathering collective memories. Social inclusion and cohesion strategies are also used in the *IT case*. In 2018, the Mann (*IT case*) museum promoted the project 'Discover Naples from the museum', targeting 700 students at risk of social exclusion. In 2019, it started the triennial project 'Caterina' (Costruire e Animare i Territori Educativi) to fight the problem of educational poverty.
- **Territorial regeneration through CH** strategies are particularly used in the *IE case* through the design of Village Design Statements aimed to support collaborative territorial regeneration driven by CH. Village Design Statements start with a baseline analysis of the distinctive features of the respective territories, in particular landscape, including protected habitat and important buildings that can be affected by development. Following the analysis, the statements also include guidelines on how the distinctive features of the territory should be taken into account in the development process. In the *PL case*, the Podgórze Museum had a decisive role in the refurbishment of the neighbourhood where it is located, being the force behind the efforts to create the 'Park Under the Railway Flyover'.
- **Construction of CH infrastructure** occurred both in the context of large cultural programmes, such as *ECoC (Mons and Weimar)* through, for instance, the creation of new museums (e.g. Musée du Doudou in Mons, *BE*), and in the context of community cultural participation initiatives (Podgórze Museum in Kraków, *PL*).

### 7.3 Societal well-being outcomes of CH strategies in the HERIWELL case studies

In all case studies, limited or missing quantitative data on the outcomes of CH represent a relevant issue. However, qualitative data and ad hoc surveys implemented in the context of the HERIWELL project provide evidence on the main outcomes achieved by the analysed CH strategies.

An initial relevant result regards the **increased participation of citizens in CH** (IT, ES, CZ, BE, PL, IE), both as users of CH and as active contributors to CH. Participation by active contributors is particularly relevant for triggering well-being, as participation contributes to citizens' empowerment, enhancing their sense of belonging and the community, and their feeling of self-efficacy and responsibility for their community (Sacco et al., 2019). Conversely, the lack of inclusivity of decision-making processes in the heritage field is considered a relevant barrier to engagement with CH (BOP, 2018; Historic England, 2019).

In the HERIWELL cases, increased **participation in CH is triggered by the following**.

- **Accessibility of CH**, which makes CH easier to access for those already engaged in CH and those new to CH, thanks to accessibility, digitisation, education and training CH strategies. When it comes to accessibility, specific attention is paid to the **digital CH 'mediation' tools** used to valorise CH.

#### Box 7.7. Accessibility strategies in HERIWELL cases

The *IT*, *ES* and *NO* cases show the *relevance of using digital technologies* (e.g. apps, videogames) as well as *new forms of CH communication* (e.g. videos, podcasts, social media) in triggering increased participation in CH. Such '*mediation*' tools make the heritage experience pleasant and fun, and trigger emotions and curiosity as well as bonding and pride, which increases interest in engaging in CH. Furthermore, they also make heritage accessible at any time and from everywhere, which makes engagement with CH easier for specific categories (e.g. women, migrants, tourists), stimulating people's interests (i.e. those that live abroad) in exploring the city and its heritage in person (as shown by the *IT* case). Digital tools and communication forms are particularly relevant for *digital natives and skilled people*, as pinpointed by the *ES* case. The *IT* case shows that, to produce SWB effects, *digital technology and communication* needs to be included in a wider framework for increasing the physical, cognitive and economic accessibility of heritage. The *BE* case shows that *physical* (e.g. decentralisation of CH contents close to people's homes) and *economic accessibility* (e.g. free entrance or entrance at a lower price) *contribute extensively to favour participation in CH*. Increasing the variety of CH activities/contents can also make CH more accessible to a wider audience, which favours increase in participation in CH (e.g. as in the *NO* case).

Source: HERIWELL Consortium based on HERIWELL case studies

- **Sense of ownership and identification with CH** (infrastructure/contents/etc.). *Participatory strategies* allow citizens to take over a significant amount of decisional power in the design and delivery of CH contents and favouring their identification with the tackled CH, making them feeling responsible for the respective CH initiative and more in general for CH and enhancing their active participation in CH.

#### Box 7.8. Sense of ownership and identification in participatory strategies implemented in HERIWELL cases

In the *BE* case, increased sense of ownership of and identification with CH deriving from participatory strategies, allowed citizens to assume an active role in the maintenance of CH activities (e.g. 'Le Jardin Suspendu'). This was introduced after the end of the ECoC Mons event in the absence of a specific financial support from the municipality. Participatory strategies have the power to enhance CH active participation, only if meaningful co-creation processes are put in place (i.e. processes that engage citizens on an equal footing with the owner of the co-creation process, or are entirely led by them with their input included in the final initiative). Where such conditions do not occur, citizens' active participation in CH remains limited. This is, for instance, the case of *Podgórze Museum in Krakow (PL)*. The museum has been created with a strong participation of the residents of Podgórze and has continued to foster citizen's engagement in the co-creation of exhibitions. However, such involvement was considered insufficient by both museum staff and interviewed citizens, which limited their engagement in the life of the museum.

Source: HERIWELL Consortium based on HERIWELL case studies

- **Recognition of CH value.** As pointed out by the CZ case, the inscription of the blueprint in the national heritage list and in UNESCO intangible heritage promoted an increased recognition of the blueprint value. This triggered citizens' high interest in the blueprint and enhanced feelings of pride of both blueprint buyers and workers, favouring their participation in strengthening the valorisation of CH and involvement of new family members (intergenerational transmission).
- **Bandwagon.** As pinpointed by the CZ case, the overall trends in society such as interest in traditional and sustainable techniques and products favoured citizens' participation in the blueprint. This is due to the activation of the bandwagon mechanism, meaning that people have the tendency to adopt specific behaviours because others do it. This also confirms the findings of the HERIWELL deliberative debate, i.e. the fact that CH is dynamic over time, being continuously reinterpreted by communities. However, this may pose risks for CH, if changes in society values and trends determine a new interpretation of CH which is not always positive, as shown by the many cases of contested heritage.

The analysis of HERIWELL cases shows that **CH contributes to all the three dimensions of SWB** identified in the HERIWELL conceptual framework.

### 7.3.1 Cultural heritage and quality of life

A contribution of cultural heritage to the **quality of life dimension** of well-being can be **noted in all HERIWELL cases, but for Weimar memories (DE).**

The table below details the main linkages between CH and quality of life dimensions in the HERIWELL cases.

**Table 7.2. Contribution of CH to quality of life in HERIWELL cases**

Quality of life sub-dimension	BE	CZ	DE	ES	IE	IT	NO	PL
Education and skills, including digitisation and digital skills	√	√	-	√	√	√	√	√
Contentment	√		√					
Health*	NA	NA	NA	NA	√	NA	NA	NA
Happiness and life satisfaction	√	√	-				√	√
Quality and sustainability of the environment		√	-		√		√	√
Knowledge and research			-	√			√	

Source: HERIWELL Consortium based on HERIWELL case studies. \*Health was not specifically analysed within the HERIWELL project, considering the extensive literature showing the contribution of cultural heritage to health.

As underlined in Table 7.2, heritage contributes in particular to education and skills, including digitisation. In HERIWELL cases, heritage contributes first to **enhancing participants' knowledge of their heritage as well as their territory and environment.**

#### Box 7.9. Increase in citizens' knowledge and skills: examples from HERIWELL cases

In the IE case, participatory strategies focused on CH-driven territorial regeneration contributed to enhancing a community's knowledge and understanding of their unique landscape, environment and the heritage features of their village.

In the ES case, heritage contributed to increasing awareness of the environment and territory. In the NO case, CH contributed to:

- increasing citizens' knowledge of the Sámi heritage and rediscovering invisible intangible Sámi heritage, by training locals as registrars;
- enhancing children's knowledge and skills in the Sámi language, through CH activities focused on the Sámi language targeted to children;
- building on the acquired skills (through specific educational activities on Sámi crafts) to develop new economic activities.

The third point is also present in the CZ case focused on the blueprint, in which valorisation activities enhanced people's knowledge about the blueprint and triggered a development in the blueprint professionals' skills. This allowed them to use these skills for further developing their blueprint laboratories, contributing to the economic development of their business. This also points out that there is a **linkage between the education and skills sub-dimension, and jobs and growth (material conditions well-being dimension).**

Heritage also contributes to enhancing learning about the past, traditions, language, identity, for example. For instance, in the IT case the *Father and Son* videogame allowed participants to improve their knowledge of the past.

Source: HERIWELL Consortium based on HERIWELL case studies

As pointed out by *the IT and NO cases*, **improving knowledge of heritage and rediscovering the past triggers pride which results in the development of a sense of community and identity (societal cohesion well-being dimension)**.

**CH** can also contribute to **the development of social and digital skills**, such as creativity (*CZ case*), intercultural communication (*ES case*), strategic thinking (*NO case*), self-efficacy (*CZ, NO, ES cases*) and digital skills (*ES case*). While some of these skills are integrated in the school curricula, others are not. *The ability of CH to improve social skills can contribute to the fulfilling of the EC [LifeComp objectives](#)*. According to this, all EU citizens should possess the following social skills: communication, collaboration, empathy, well-being, self-regulation, critical thinking, growth mindset and managing learning.

As revealed by the *CZ and NO cases*, improvement in skills triggers **pride in a person and hence increases their self-esteem, which makes them feel content or satisfied**. Such feelings of self-efficacy are even more relevant in the case of vulnerable groups (e.g. older people, people with disabilities).

**Increase in life satisfaction is also associated with people's feelings of having learnt something and having spent well their time in participation in heritage activities** (e.g. *PL case*). 'People derive life satisfaction and a sense of happiness from many aspects of their actions. Certainly, one of them is the feeling of time well spent or gaining knowledge. This is precisely the case of the visitors of the Podgórze Museum with survey results showing that the most answers (45.6 %) indicate the importance of broadening knowledge (16.1 % acquiring new skills) as well as the feeling of time well spent (41.0 %).' (Jagodzińska, Sanetra-Szeliga and Purchla, 2022: 39).

**Life satisfaction and happiness is also associated with the ability of CH to fostering social relations and feelings of belonging (societal cohesion well-being dimension)**. For instance, in the *PL case*, visitors to the Podgórze Museum associate the museum with an opportunity to spend time with people, meeting new ones and relaxing. The experience of the museum as a meeting place is also detected in the *NO case*. This perception regards not only material heritage (i.e. museums), but also intangible heritage, as pointed out by the *CZ case*. 'The respondents often refer to the feeling of satisfaction or fulfilment enticed by the blueprint technique. The technique "requiring handicraft" also "provides an experience" and "allows people to meet", (...) bringing "mental satisfaction".' (Petrová, 2022: 25).

The *BE case* shows that **improvement in citizens' quality of life is also triggered by the cultural and economic development (material conditions well-being dimension)**, to which CH contributes (i.e. through the ECoC Mons 2015 in this case).

**Linkages between CH and the environment** are present in particular in three HERIWELL cases (*CZ, PL and NO*). In the *CZ and NO cases*, they are related to traditional techniques fostering sustainability as in the blueprint (*CZ*) and duodji (*NO*). In the *PL case* they are related to the active engagement of the museum in the sustainable urban refurbishment of the surrounding area through the creation of a park.

**Knowledge and research** seem to be **less impacted** in the analysed cases, with the exception of the *ES and NO cases*. In these two cases, participatory strategies were targeted at producing collective knowledge on local heritage. The value of collective knowledge produced by the project goes beyond the scientific aspect, being more aligned with CH participatory governance and the social role of universities in local communities. The two cases show the *potential of CH for producing citizen science*.

### 7.3.2 Cultural heritage and societal cohesion

As noted in Table 7.3, in HERIWELL cases, CH contributes to **all dimensions of societal cohesion**.

**Table 7.3. Contribution of CH to societal cohesion in HERIWELL cases**

Societal cohesion	BE	CZ	DE	ES	IE	IT	NO	PL
Community engagement, volunteering and charitable giving	√			√	√	√	√	√
Place identity and symbolic representation	√	√	√	√	√	√	√	√
Community awareness, civic cohesion and sense of belonging	√	√		√	√	√	√	√
Integration and inclusion of minorities, migrants and disadvantaged groups, social inclusion, inclusive growth	√	√		√		√	√	
Trust							√	

Source: HERIWELL Consortium based on HERIWELL case studies

HERIWELL cases reveal that CH has a **strong link** with **place identity and symbolic representation**, triggered in particular by **activating positive memories and emotions and pride**.

#### **Box 7.10. Memories, emotions and pride triggered by CH: some examples from HERIWELL cases**

In the *BE* case, 67% of the respondents surveyed by the KEA (2016) study reported that ECoC Mons had helped them to develop a greater sense of pride and belonging. Around 80% declared themselves proud of the city attractiveness as a cultural and tourist venue after ECoC. A feeling of pride in heritage is also noted in the *CZ* case (*blueprint*). The blueprint elicits emotions, and the feeling of pride and togetherness, which strengthen connections between people and places. In the *ES* case, activities using CH raised awareness of the common heritage and the intimate linkage between the urban historic built landscape, the territory and the collective memories. This is also noted in the *NO* case. The return of the Sámi heritage to Sámi people has involved a high level of emotions, also triggering a sense of pride that contributes to building identities. In the *ES*, *IT* and *NO* cases, digitisation of CH strengthens migrants' identity through reconnecting them to their origin communities and places. In the *PL* and *IE* cases, feelings of identification with a place and belonging were cultivated by the active participation in CH. This made people aware of the value of their heritage as well as feeling proud of it. In the *PL* case, interviewees claim that thanks to Podgórze Museum, they are 'better rooted in Podgórze' and understand their identity better.

Source: HERIWELL Consortium based on HERIWELL case studies

However, CH may also produce **contrasting memories and emotions**, as shown by the *DE* case. While generally, people in Weimar feel proud of living in a place with a strong cultural and historic identity, one interviewee reported feeling ashamed of the Nazi and Soviet heritage. While this was a single voice, it pinpoints the difficulties in identifying with the narratives of a city (i.e. Weimar) that bears so many layers of meaning.

HERIWELL cases unveil that there is a **mutual connection between place identity and sense of belonging**. Many of the HERIWELL cases presenting a relation between CH and place identity also show a linkage between CH and the sense of belonging.

#### **Box 7.11. Place identity and sense of belonging: some examples from HERIWELL cases**

As mentioned previously, in the *BE* case over half of the surveyed people reported an increase in the feeling of belonging. In the *CZ* case, engaging in the blueprint triggered a feeling of togetherness. In the *PL* case, residents' engagement in building the Podgórze collection awakened and fostered their awareness of connections with the district and community. For almost half (46%) of the visitors to the museum surveyed by the HERIWELL team, the museum is a platform for dialogue on issues related with the district, a safe space to exchange views and to act together. In the surveyed people's view, the museum as a platform of dialogue makes them feel connected with the district and its problems. In the *NO* case, the engagement of children of all ages in Sámi CH contributed to the sense of community and built healthy self-esteem, strongly connected to a grounded sense of identity, individual well-being and societal support. Furthermore, in the *NO* case, as in the *PL* case, Sámi museums have become a shared meeting place, building relations among people and cultivating a strong shared identity.

Source: HERIWELL Consortium based on HERIWELL case studies

The HERIWELL cases also point to an *intertwined relation* between *sense of belonging, place identity and community engagement, including in CH, charitable giving and volunteering*. On the one hand, active engagement in CH contributes to increasing a sense of belonging and place identity, as described previously. On the other hand, a higher sense of belonging and identification with a community or place also triggers a higher engagement of the community in CH.

### Box 7.12. Relation between sense of belonging, place identity and community engagement: some examples from HERIWELL cases

One of the interviewees of the Podgórze Museum case noted that feeling connected with the Podgórze district played a role in citizens' contribution to the creation of the Podgórze Museum: '*the inhabitants of Podgorze, who embody the identity of being here for generations, were happy about such a place and wanted to contribute something to its operation*' (Jagodzińska et al., 2022: 37). This intertwined relation is also noted in the CZ case, which shows that the feeling of pride in CH is an important feature for engaging in CH, also from a professional point of view. Indeed, pride in a long family blueprint tradition is an important element for workshop workers and intergenerational transfer.

Source: HERIWELL Consortium based on HERIWELL case studies

HERIWELL cases also show that **CH contributes extensively to societal cohesion** through fostering the *acknowledgement of cultural diversity, inclusion of disadvantaged groups, gender equality, reconciliation and restoration of harm as well as through building intergenerational dialogue and solidarity*.

### Box 7.13. CH contribution to societal cohesion: some examples from HERIWELL cases

In the CZ case, cultural diversity is represented on a wide scale through the variety of traditions associated with folk and art groups that are closely connected with the blueprint. Furthermore, in the CZ case, blueprint workshops involve different vulnerable categories in blueprint creation (e.g. older people in retirement homes, people with disabilities). It is a contribution to their integration in the community and relieves them of feelings of loneliness and, for people with disabilities, to their labour market integration. In the BE case, 68% of the people surveyed by the KEA study (2016) believe that ECoC Mons was beneficial to social inclusion. In the ES case, the creation of collective memories, through intergenerational dialogue and storytelling, fostered solidarity through enhancing empathy and the adherence to other people's causes, favouring social cohesion in the community. In the PL case, 60% of visitors surveyed by the HERIWELL team consider that the Podgórze Museum integrated the residents in the district. However, not all interviewees fully agree; they consider this result as not yet entirely achieved, and the museum still needs to undertake further actions to be seen as an integrator agent in the community. In the IT case the digital tools, and in particular social networks, adopted by the Mann museum improved gender balance in the access to cultural resources. The NO case shows that CH can foster societal cohesion also through healing past wrongs and reconciling minorities and majorities. The case of the Arran Heritage Museum shows that a strong cultural institution can help renegotiating traumatic histories, by providing a space for the community to speak about trauma and to renegotiate the past. Some of the interviewees consider that the return of the Sámi CH entails a recognition and respect between the Norwegians and the Sámi culture. This should include a recognition of equality between the Sámi Norwegian minority and the Norwegian majority, which is reconciliatory.

Source: HERIWELL Consortium based on HERIWELL case studies

Although to a lesser extent, HERIWELL cases (in particular the NO case) also show that CH contributes to **building trust in people and institutions**.

### Box 7.14. CH contribution to building trust in the Sámi case

The Arran Heritage Museum has been carrying out ongoing work to rebuild trust, to enable the Sámi community to have faith and trust in each other and in our culture, as well as to rebuild dignity.<sup>99</sup> The museum has also successfully secured funding for a position dedicated to the building of trust, within the community, and between community and public services, police and social services, called *Jasska*, or ‘safe’.<sup>100</sup>

Source: HERIWELL Consortium based on HERIWELL Sámi Cultural Institutions as a Source of Societal Well-Being in Norway case study, 2021

HERIWELL cases show that **emotions**, **repeated interactions** and **dialogue** between people as well as **empathy** with others play a relevant role in achieving societal cohesion (see Section 7.4 for further details). Furthermore, digital tools and contemporary creations play a significant role in triggering these mechanisms. HERIWELL cases also point out a **strong connection between societal cohesion and happiness, and life satisfaction**. This is due to the fact that strong social relations, equality in society and acknowledgement of diversity contribute to individual well-being and satisfaction.

### 7.3.3 Cultural heritage and material conditions

A contribution of CH to material conditions is present in all cases, but for the *IT* case which did not focus on investigating the role of the museum as an attractor for economic development. As shown in Table 7.4, CH impacted on both jobs and earnings, and on territorial attractiveness and branding.

**Table 7.4. CH contribution to material conditions in HERIWELL cases**

Material conditions sub-dimension	BE	CZ	DE	ES	IE	IT	NO	PL
Jobs, earnings and business development	√	√	√	√	√	NA	√	
Territorial attractiveness and branding	√	√	√		√	NA	√	√

Source: HERIWELL Consortium based on HERIWELL case studies

The HERIWELL *BE*, *DE* and *CZ* cases show that CH can contribute to local economic development through an increase in investments, the creation of jobs, the visibility of existing and new enterprises, and the attractiveness of the territorial area valorising it.

### Box 7.15. CH contribution to material conditions: examples from HERIWELL cases

In the *BE* case, ECoC Mons acted as a leverage for the development of economic activities related to tourism and contributed to increase the visibility for local enterprises. The project stimulated the creation of new businesses and the development of a more competitive environment (KEA, 2016). In addition, ECoC Mons generated around 380 jobs full time equivalent per year in the period 2005–2015 and around 2000 jobs in 2015. The resulted was an economic impact of EUR 77 million a year, with a peak of EUR 400 million in 2015. The impact study of *ECoC Mons* shows that for 1 euro invested in the ECoC Mons the city had a return of 5.74 euro, spread over a period of 10 years. A similar result was registered in the *DE* case. ECoC Weimar brought 7 million visitors to Weimar (compared to 4.2 million in Berlin in the same year). Even though the number of visitors decreased after the ECoC, it remained stable to a level that does not put pressure on the city infrastructure and services. In terms of economic impact, in 2013 the budget of the city for tourism amounted to around EUR 454 000, while total turnover from tourism amounted to EUR 208 800 000 (Weimar GmbH, 2014). In the *CZ* case, the blueprint contributes to attracting locals and tourists, favouring job creation and earnings in the region. Traditional practices are also used to generate new jobs in the tourism sector in the *NO* case. In the *PL* case, over half of the HERIWELL people surveyed consider that the museum has contributed to making the district prettier and more attractive (56%) and the museum provides a chance for positive change of the neighbourhood (67.5%). In the *IE* case, CH acts as a focus for investment, stimulating social and economic regeneration. Differently from the other cases, in the *ES* case ICH contributes to economic development through stimulating technological development. Here, ICH acts as a booster for contemporary creativity generating the creation of a digital app that has been further developed and used in other areas of ES.

Source: HERIWELL Consortium based on HERIWELL case studies

<sup>99</sup> [Den store skammen – Museumsnytt](#)

<sup>100</sup> [‘Tillitsbygging’ \(arran.no\)](#)

To summarise, the HERIWELL cases point out that **territorial attractiveness and branding** as well **technological development in CH** contribute extensively in **generating investments, jobs and earnings** (i.e. economic development). In addition, HERIWELL cases reveal a series of factors that favour the contribution of CH to economic development:

- **improvement** in and **development of CH infrastructure**;
- increased **accessibility of CH**, also through digitisation;
- **pride** in CH that stimulates entrepreneurship in the CH field;
- **salience of CH valorisation initiatives** as well as their novelty and ability to offer an **authentic experience**, which trigger an increase in the number of tourists;
- **reputation of CH**, contributing to increasing the number of tourists;
- **participation in cultural heritage** (see IE case study, Annex VII);
- **improvement in the urban quality of areas** where CH is located.

When it comes to **touristic development** of a certain destination, the *DE* case shows that **CH narrative strongly influences it**. As noted in the *DE* case, heritage exists through narratives. If there are no narratives to direct attention, heritage remains only old practices, buildings, ideas. A consistent and appropriate narrative affects the success of a heritage location. In the *DE* case, the CH narrative affected the number of visitors, the likelihood of their returning or their verbal communication with other potential visitors. Narratives thus have an impact on the success of the tourism industry and, as pointed out in the *DE* case, they can shape the mental infrastructure of the inhabitants. However, the relation between narratives and economic development triggered by increase in the touristic potential of a destination cannot be described as a straight cause–effect relation. Specific narratives of a certain area of heritage are embedded into the larger frames of master narratives, that is, the ways in which certain areas and epochs see themselves. Narratives on a heritage site have to fit into the master narrative, and they have to make a difference to make a site a special location. A policy of narratives, a deliberate effort to tell the appropriate and the understandable story for a set of heritage, is thus crucial for a site.

## 7.4 Mechanisms favouring the contribution of CH to well-being

The HERIWELL cases allow the detection of the main mechanisms that favour the contribution of CH to well-being.

All the considered cases point out that the contribution of CH to SWB, in all its dimensions, depend firstly on the adopted **valorisation strategies**. While CH is important per se, its contribution to SWB depends on the existence of valorisation strategies that purposely make use of its individual and collective well-being potential. The **narrative of CH** embedded in the valorisation strategy is also particularly important for the contribution of CH to SWB. As shown in the Weimar case (*DE*), the narrative of CH should pay particular attention to power structures in society with the aim to avoid reproducing them and to ensure openness and inclusivity.

**Quality and accessibility of CH** are also particularly relevant for ensuring the valorisation and, hence, the contribution of CH to SWB.

In terms of accessibility of CH attention should be on:

- physical accessibility, through, for instance, increasing access of people with disabilities to CH places, collections, practices, decentralising CH activities, bringing CH activities in non-traditional CH settings (e.g. hospitals, retirement homes), digitising CH collections, adapting schedules to the needs of the people;
- cognitive accessibility, through, for instance, contemporary creation of CH, integration of CH with other cultural or leisure activities (e.g. films, sport), digitisation of CH, including the use of social media, designing CH activities embedding the needs of people with different backgrounds (e.g. people with disabilities, people with different levels of education and skills, migrants);
- economic accessibility, through, for instance, the reduction or elimination of fees in particular for vulnerable categories.

When it comes to quality of CH, HERIWELL cases reveal that the **conservation and preservation state of CH** is important for ensuring the valorisation and the contribution of CH to SWB. Equally important is its **capacity to provide safe, peaceful and inclusive spaces and opportunities for interaction** with it and between people. Particular attention should be paid to the **preservation and conservation of ICH**. As noted by ES, NO and CZ cases, often ICH traditions and practices are dependent on intergenerational transmission. Therefore, specific strategies should be adopted to foster it (e.g. creation of collective memories of ICH – also digital; embedment of ICH in education and training; valorisation of traditions and practices within TCH settings, such as museums, libraries, archives; inscription of ICH in special registers, labels.).

**The quality and accessibility of areas where CH is located or experienced** are also particularly relevant for maximising the CH well-being potential (e.g. *PL case*). Attention needs to be paid to the physical accessibility and the urban quality of neighbourhoods where CH is located.

**'Making heritage alive'** is equally important. Evidence from the HERIWELL cases shows that it can be achieved through contemporary creations, including digital; turning CH spaces (e.g. museums, libraries) into multifunctional spaces to make them attractive also for people not directly interested in heritage (e.g. as in the *PL* and *NO* cases).

The **governance structure of CH** is also an important element for fostering the potential of CH to contribute to SWB, in all its dimensions. HERIWELL cases reveal various aspects that should be carefully considered in order to enhance the individual and collective well-being potential of CH.

- Activation of *participatory CH decision-making and implementation*. As emphasised by the *NO* and *ES* cases, participatory strategies should be adopted not only in CH decision-making and implementation processes, but also in research on CH, opening spaces for citizen science in this area. As previously mentioned, such strategies contribute extensively to societal well-being benefits of CH. However, their contribution to SWB depends on a number of factors. First, their *intensity* (co-creation and co-production contribute more than consultation), *embedment in the community* (participation should be led by locals and not by external consultants). Second, the *power structures of CH organisations* (participatory strategies should be embedded in the daily life of the organisations). Third, *openness and inclusivity of participatory processes* and the *implementation of the decisions taken within them*, the *capacity of CH institutions to implement and govern such processes*, and the *flexibility and rapidity of administrative procedures*. While electronic participation has developed extensively in recent years, the *ES* case points out that physical meetings are still significant for maintaining citizens engagement over time, and for ensuring the inclusivity of the engagement process. Therefore, a *mix of physical and digital participatory strategies should be ensured* to reach various groups of the population (youngsters, migrants, women, etc.).
- *Transversal political support* to ensure funding and continuity of CH strategies over time. In the *ECoC Mons* case, *ECoC 2015* enjoyed strong political support from the mayor of Mons and other municipalities and public bodies, which ensured smooth governance and management of the programme and the institutionalisation of its legacy. However, while the legacy of *ECoC Mons 2015* continues, with the change in the political lead of the municipality in 2018 the cultural policy, including heritage, has been downsized compared to the previous period.
- *Multilevel and multisectoral governance of CH, involving public and private actors*. CH decision-making and implementation processes have to be based on a continuous dialogue and cooperation between the various levels of government. This should include between various policy fields to allow for integrated CH strategies that can maximise its SWB potential (e.g. *IE case*).
- *Adequately equipped and continuous teams* that can ensure the implementation of the strategies on the ground as well as their continuity over time. In addition, the *IE* and *BE* cases also point out that *staff* engaged in CH strategies should be *both rooted locally* (or with a good knowledge of the local heritage and context) and *internationally connected*. For instance, in the *BE* case the involvement of local artists was particularly relevant both in terms of knowledge and connection with the community.

- *Institutionalisation of CH projects and interventions* to ensure their sustainability over time as well as their scalability. Besides institutionalisation, the creation of sustainability plans of CH initiatives also proved useful to ensure their continuity over time, as revealed by the ECoC Mons case.

**Also related to governance is the embedment of CH strategies within wider social development strategies**, particularly significant for fostering the contribution of CH to SWB and for ensuring its continuity over time. HERIWELL cases show that *for the design of integrated strategies the acknowledgement of the SWB potential of CH is needed both at institutional and community level*. However, *such an acknowledgement is hard to obtain in the absence of monitoring and evaluation systems and their communication*. In all the HERIWELL cases, monitoring and evaluation systems are still limitedly developed or lacking completely.

**Adequate and continuous funding** is also relevant in fostering the SWB potential of CH, as pointed out by all HERIWELL cases. This is even more important in the context of Covid-19 that has hit the CH sector strongly. Funding of CH should also consider innovative forms (e.g. crowdfunding).

HERIWELL cases also point out a series of social mechanisms<sup>101</sup> that favour the contribution of CH to societal well-being, as described in Figure 7.5.

**Table 7.5. Social mechanisms favouring CH contribution to SWB**

Mechanisms in HERIWELL cases	Brief definition	SWB dimensions and sub-dimensions fostered in HERIWELL cases	Triggering design or context features in HERIWELL cases
<b>Emotions</b> DE, ES, IT, NO	Strong feelings towards an object or issue that fosters changes in people's behaviours	Societal cohesion: place identity, sense of belonging and community engagement	CH interventions recalling memories of a person's history or past, practices and traditions, tangible heritage (e.g. collective memories creation, education)
<b>Pride</b> BE, CZ, IT, NO, PL	Feelings caused by own or another's achievement linked with self-esteem and positive image	Societal cohesion: place identity, sense of belonging Quality of life: life satisfaction and happiness	
<b>Amusement</b> IT, CZ	Emotion that has the power to catch our attention and memory, and to influence our moral assessment of others	Quality of life: education and skills, including digitisation; happiness and life satisfaction It also contributes to enhancing participation in CH.	CH gamification (e.g. Father and Son), interactive CH experiences (e.g. blueprint workshops) that make learning of CH engaging and attractive
<b>Entertainment</b> IT, ES, PL, NO	Connected to amusement, it makes people feel part of a specific 'fictional' situation at a point where their behaviours are shaped more by the 'fictional' situation than by the reality they live in	Quality of life: education and skills, including digitisation; happiness and life satisfaction Societal cohesion: place identity, sense of belonging	CH gamification (e.g. Father and Son), digitisation (e.g. Architetturas della Memoria app), CH places as multifunctional spaces including entertaining activities (e.g. broadcasting films, walks accompanying exhibitions)
<b>Repeated interactions</b> ES	Continuous meeting and dialogue between people, improving trust, which fosters cooperation among them	Societal cohesion: sense of belonging	Meeting and dialogue opportunities around CH (e.g. intercultural dialogue)
<b>Certification</b> CZ, BE	Validation of an object or person by an external authority, which increases recognition of value	Material conditions: jobs and earnings through increasing visibility of CH and people's interest and participation in it, and safeguarding its value	Subscription of CH in specific lists (e.g. inclusion of the blueprint in the UNESCO list); setting specific CH awards (e.g.

<sup>101</sup> Mechanisms are causal explanations of why the context features combined with process features shape the behaviours of some policy actors and trigger some kind of change.

Mechanisms in HERIWELL cases	Brief definition	SWB dimensions and sub-dimensions fostered in HERIWELL cases	Triggering design or context features in HERIWELL cases
<b>Bandwagon</b> <b>CZ</b>	People tend to adopt certain behaviours, beliefs, etc. because others do it	Favouring SWB dimensions, through enhancing participation in CH deriving from current trends in society; may also decrease participation if current trends change	ECoC award); specific CH label or trademark  Current society trends focused on getting back to the roots, slowing down, preferring local products and sustainable consumption enhancing participation in CH (i.e. the CZ blueprint case)
<b>Self-efficacy</b> <b>BE, ES, IE, PL, NO</b>	People's trust in their capacity of influencing events that affect their lives	Quality of life: life satisfaction and happiness; education and skills, including digitisation  It also fosters the other SWB dimensions through enhancing participation of CH deriving from a stronger sense of ownership of and care for heritage.	Co-creation and co-design of CH
<b>Performance feedback</b> <b>IE</b>	Providing information on results achieved compared to the set expectations	It favours SWB in all its dimensions by enhancing people's participation in CH, especially in interventions whose results are not immediately visible to the whole community	Monitoring and evaluation of CH interventions shedding light on results obtained
<b>Financial incentives</b> <b>BE, CZ</b>	Provision of financial incentives that determine changes in behaviour	Material conditions: jobs and earnings deriving from financial incentives stimulating investments in CH or ensuring continuity of CH activities, especially in crisis periods  It favours the other dimensions through strengthening participation in CH, in particular for people with limited access to financial resources.	Free or low-cost access to CH activities; subsidies targeted to CH organisations; financial prizes  Its functioning is conditioned by the existence of a wider social and territorial development framework that embeds CH.
<b>Saliency</b>	The capacity of certain things to stand out and attract people's attention	It favours SWB in its dimensions through enhancing people's engagement in CH.	CH interventions that put CH at the forefront of the public agenda (e.g. prizes, subscription to CH lists, ECoC)

Source: HERIWELL Consortium based on HERIWELL case studies

## 8 Cultural heritage and societal well-being in EU investments

### Key findings

- According to the **ESIF** categorisation data, EUR 5.4 billion of ERDF 2014–2020 funds were invested up to 2020 in cultural heritage assets and services (2.4 % of total allocated ERDF funds). The highest incidence of CH allocations out of total ERDF allocations are in Malta (15.2 %), Portugal (6.5 %) and Cyprus (4.3 %). Portuguese regions show the highest level of allocations per inhabitant.
- National databases show that overall, 6595 projects related to CH have been funded under ERDF (excluding ETC projects), while 449 CH projects have been funded by the ESF.
- An additional EUR 1.14 billion has been invested by ERDF in 1085 CH projects under the ETC objective, and the EAFRD has financed projects in the field of cultural heritage in 19 countries, for a total amount of EUR 8.03 million.
- The correlation analyses between total planned ESIF allocations in CH and a subset of the SWB indicators available at regional level show positive, although low, correlations between CH allocations and SWB indicators.
- According to the European Commission's project database for the **Creative Europe** Culture sub-programme, 4451 projects in the cultural and creative sectors have been funded in the programming period 2014–2020. Out of these, 224 are related to CH investments. According to a qualitative assessment, out of the selected 224 CH-related projects, 64 % had a potential impact on societal cohesion, 57 % on quality of life and 30 % on material conditions.
- In the programming period 2014–2020, eight **ECoCs** have had a specific focus on the promotion, preservation or valorisation of CH (TCH, ICH, combined and digital): Umeå, Rīga, Mons, Wrocław, Paphos, Valletta, Matera and Plovdiv. In all of them ECoC investments improved accessibility and a higher engagement of citizens in heritage and cultural activities.
- All eight analysed ECoCs present linkages between CH and SWB.
- The potential of CH in achieving SWB was fostered by several factors: continuous funding and equality in accessing it; the decentralisation of CH initiatives and use of innovative cultural resources; and long-term, integrated and participatory strategies, based on a multilevel governance approach.

Various types of EU programmes and investment funds (e.g. European Structural and Investment Funds – ESIF; Horizon 2020–H2020; Creative Europe; Erasmus+; and European Neighbourhood Instrument – ENI) and international funds (e.g. EEA and Norway grants) have addressed cultural heritage in the programming period 2014–2020, supporting the protection, conservation and valorisation of cultural heritage.

The HERIWELL analysis focuses on a selection of these investments, i.e. ESIF, Creative Europe and the European Capitals of Culture programme. ESIF investments are considered due to the significant amounts invested in cultural heritage, especially under the ERDF, as also reported by the European Court of Auditors (2020). The Creative Europe programme has been selected because it is the main EU programme specifically and entirely dedicated to culture, including cultural heritage. Finally, the European Capitals of Culture programme allows the exploration of the interplay between cultural heritage and societal well-being in the context of this major event.

EEA and Norway grants, presented in Box 8.1, are not analysed as they are not funded by EU institutions. These grants have an important role in supporting cultural heritage protection, conservation and valorisation in Eastern Europe countries (BG, CZ, HR, HU, RO, SK, SI), Baltic countries (EE, LT, LV), Central Europe countries (PL) and Mediterranean countries (CY, EL, MT, PT).

## Box 8.1. EEA and Norway grants in cultural heritage

EEA and Norway grants are funded by Iceland, Liechtenstein and Norway, with the aim to strengthen the collaboration between these countries and the 15 EU MS benefiting from the grants. While the EEA grants are mostly funded jointly, the Norway grants are funded only by Norway. During the 2014–2020 programming period, the EEA grants amounted to EUR 1.5 billion, of which 95.8 % was provided by Norway, 3 % by Iceland and 1.2 % by Liechtenstein.

Cultural heritage is tackled within the *'Culture, civil society good governance, and fundamental rights and freedoms'* topic. The EEA and Norway grants acknowledge the potential contribution of cultural heritage to local and regional development, capacity development, social inclusion, fighting discrimination and violent extremism, promoting cultural diversity and strengthening intercultural dialogue, and democracy.

In the period 2014–2020, EEA and Norway grants invested EUR 170 million in culture programmes, including cultural heritage. With the support of these investments, 176 CH buildings have been restored, 42 CH buildings and sites have been opened to the public, 12 new museums have been created, 274 358 CH items have been digitised and 11 funded projects received an EU Award for Cultural Heritage or Europa Nostra Award.

Source: <https://eeagrants.org/>; [https://eeagrants.org/sites/default/files/resources/EEA\\_Culture\\_leaflet\\_Final\\_web.pdf](https://eeagrants.org/sites/default/files/resources/EEA_Culture_leaflet_Final_web.pdf)

## 8.1 ESIF investments in cultural heritage and linkages with societal well-being

### 8.1.1 Methodology

The ESIFs are the main direct source of EU funding for investments in CH. Examples of the type of projects supported by the different ESI Funds are provided in Annex VIII.A (Table 1.11-1.14). They show that all the different forms of CH are supported, with a prevalence of tangible and digital CH supported by the ERDF. Intangible CH is supported by the ESF, tangible and mixed CH by the European Territorial Cooperation (ETC) projects, and the EAFRD.

This section provides insights on the financial allocations of ESIF programmes and funds to investments in CH that could contribute to societal well-being.

A mixed quali-quantitative methodology approach is adopted, based on the following three main steps illustrated in Figure 1.1 in Annex VIII.A:

- Collection of data and mapping of ESIF investments in cultural heritage at national and, whenever possible, regional level. Data and indicators include those available in EU data sources (e.g. ESIF Open Data Platform<sup>102</sup> for ERDF allocations, and the keep.eu online portal<sup>103</sup> for the European Territorial Cooperation), and national ERDF and ESF data sources on financial allocations and number of funded projects collected and analysed by the HERIWELL country experts using keywords.
- A selection of SWB indicators available at regional level are used as proxies of the three societal well-being dimensions identified in the HERIWELL Conceptual Framework.
- Correlation analyses between the ESIF investments in CH (measured as per capita allocations) and SWB indicators. In addition, the ERDF per capita allocations have been included as an explanatory variable in the econometric estimation of the relation between tangible CH, and the quality of life and social cohesion dimensions of SWB (see Chapter 2).

In the following sections allocations and projects on CH by fund are mapped out, then Section 8.1.3 presents the results of the correlation analysis.

<sup>102</sup> <https://cohesiondata.ec.europa.eu/2014-2020/ESIF-2014-2020-categorisation-ERDF-ESF-CF-planned/9fpg-67a4>

<sup>103</sup> <https://keep.eu/>

## 8.1.2 Overview of ESIF investments in CH

### 8.1.2.1 ERDF investments in CH

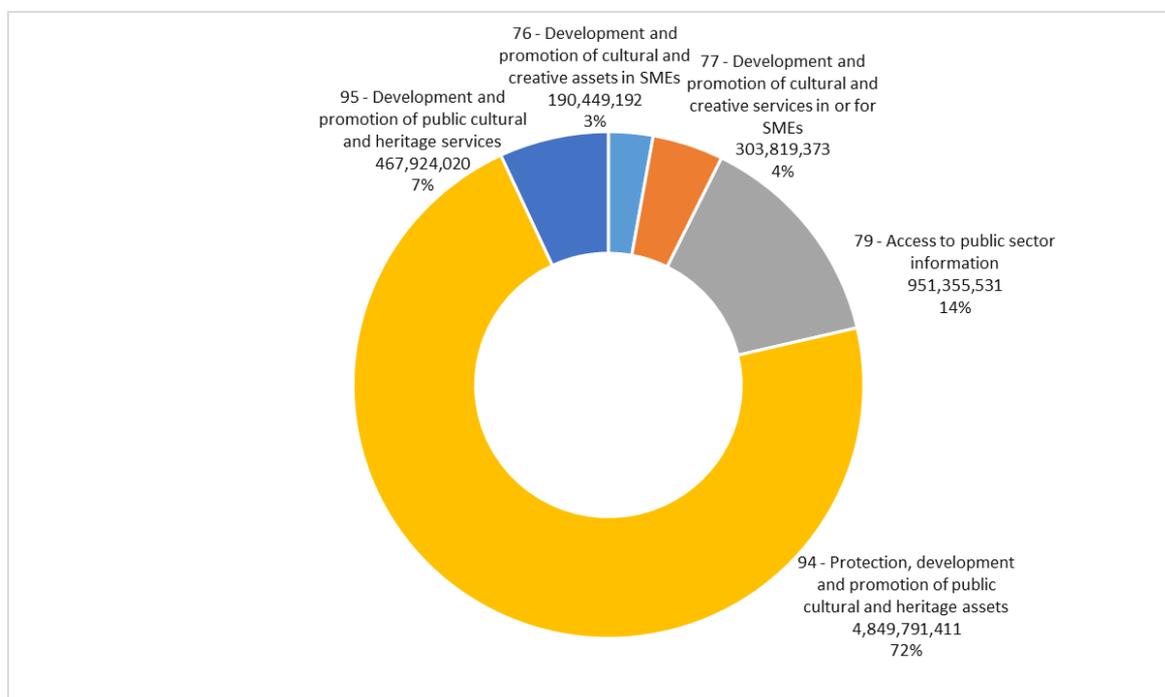
The ESIF Open Data Platform categorisation system allows an analysis of the EU financial allocations for ERDF on intervention fields related to the cultural heritage sector<sup>104</sup>.

According to these data, about EUR 6.8 billion of ERDF funds (equivalent to 3.1 % of total allocated ERDF funds) have been invested up to 2020 in the sector of culture in the 2014–2020 programming period.

As shown in Figure 8.1, **the largest part of these funds (79 %) is allocated to CH**<sup>105</sup>. About EUR 4.8 billion is under the specific investment field 94–*Protection, development and promotion of public cultural and heritage assets* (72 % of total planned allocations under ERDF). EUR 468 million (7 %) is under the intervention field 95 – *Development and promotion of public cultural and heritage services*.

An additional EUR 81.7 million has been allocated to the intervention field related to cultural heritage under the I&P Afrique Entrepreneurs (IPAE) fund for territorial cooperation.

**Figure 8.1. Distribution of total planned allocations by intervention fields related to the cultural sector in the EU – euro and % – cumulative 2014–2020**



Source: HERIWELL Consortium based on ESIF Open Data Platform, accessed January 2022

<sup>104</sup> In the 2014–2020 programming period, 5 out of 123 intervention fields in the ESIF categorisation system are related to the cultural sector and two specifically to cultural heritage (CH): 76 – Development and promotion of cultural and creative assets in SMEs; 77 – Development and promotion of cultural and creative services in or for SMEs; 79 – Access to public sector information (including open data e-Culture, digital libraries, e-Content and e-Tourism); 94 – Protection, development and promotion of public cultural and heritage assets; 95 – Development and promotion of public cultural and heritage services. ESIF 2014–2020: *EUR allocation by main categorisation codes by fund. ESIF Open Data Platform*, updated 24 January 2022.

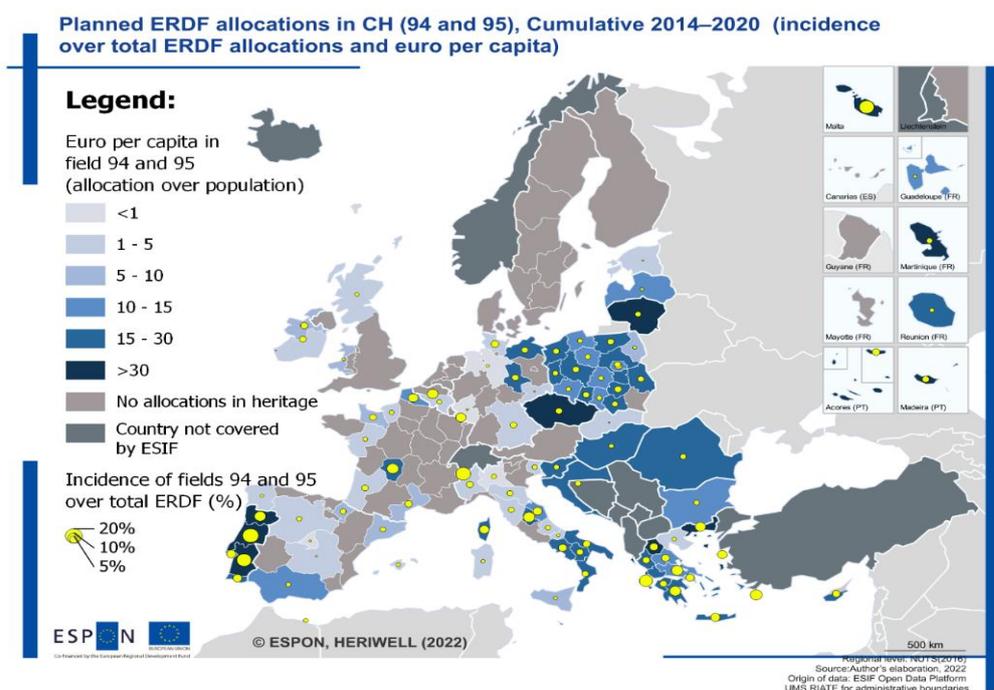
<sup>105</sup> Using the ESIF Open Data Platform it is possible to consider the cumulative planned ERDF allocations 2014–2020 in CH in terms of: (i) incidence % of CH allocations over total ERDF planned allocations; (ii) ERDF CH allocations per inhabitant (using data on population by region from Eurostat); and (iii) ERDF CH allocations on GDP (annual average). The ESIF categorisation data do not provide information on the total number of projects related to CH.

Allocations related to CH are reported for 21 MSs, plus the UK, while no specific allocations on CH are recorded for AT, DK, FI, LU, NL and SE. The data are provided for each regional and national programme allowing the calculations of allocations at NUTS 2 level for 10 Member States. BG, CZ, HR, HU, LT, RO, SI, SK have programmes only at national level, while BE, DE, IE, UK are at NUTS 1 level.

The analysis of ERDF planned financial allocations (excluding ETC) in CH (cod\_94 and cod\_95) across countries and regions shows the following evidence (see Map 8.1 and 8.2, and Figures 1.2 and 1.3 in Annex VIII.A).

- EU Member States (MSs) with the highest allocations (absolute amount) are PL (EUR 993.8 million), PT (EUR 802.6 million), IT (EUR 678.7 million), CZ (EUR 408.3 million) and RO (EUR 312.6 million). EUR 648.2 million has been allocated under specific ERDF programmes for territorial cooperation.
- Compared to 2.4 % of the EU average, MSs with the highest incidence of CH allocations over total ERDF allocations are MT (15.2 %), PT (6.5 %) and CY (4.3 %). In Poland and Italy, CH accounts for 2.5 % and 2.7 % of total ERDF allocations, respectively.
- Regions with the highest incidence in CH allocations over total ERDF allocations are: *Centro*, PT (18 % – EUR 326 million); Malta (15.2 % – EUR 48.2 million); *Valle d'Aosta*, IT (15.2 % – EUR 4.6 million); *Alentejo*, PT (14.6 % – EUR 131.6 million); *Ionian Islands*, EL (12.5 % – EUR 16.4 million); Continental Greece, EL (9.7 % – EUR 5.2 million); *Limousin*, FR (9.5 % – EUR 12.6 million); *Umbria*, IT (9.3 % – EUR 18.5 million); South Aegean, EL (9.1 % – EUR 5.9 million); *Norte*, PT (8.9 % – EUR 249.6 million), Peloponnisos, EL (8.8 % – EUR 12.2 million) and *Région de Bruxelles-Capitale*, BE (8.2 % – EUR 7.8 million).
- Portuguese regions also show the highest level of allocations per inhabitant: the CH allocation per capita is more than EUR 100 in *Alentejo* (EUR 183), the *Autonomous Region of the Azores* (EUR 147) and *Centro* (EUR 145). *Malta* and the *Ionian Islands* (EL) also register high levels of per capita allocations for CH, equivalent to EUR 104 and 80, respectively.
- The annual average of CH allocations is equal to EUR 59 per million of GDP (Map 8.2); in Portuguese regions the annual average of CH allocations per million of GDP exceed EUR 1000 in *Alentejo* (EUR 1512), *Centro-PT* (EUR 1288) and the *Autonomous Region of the Azores* (EUR 1269); other regions with highest CH allocations compared to GDP are *Ionian Islands-EL* (EUR 749), *North Aegean-EL* (EUR 685), *Malta* (EUR 618), *Eastern Macedonia and Thrace-EL* (EUR 493), *Warminsko-Mazurskie-PL* (EUR 483) and *Swietokrzyskie-PL* (EUR 469).

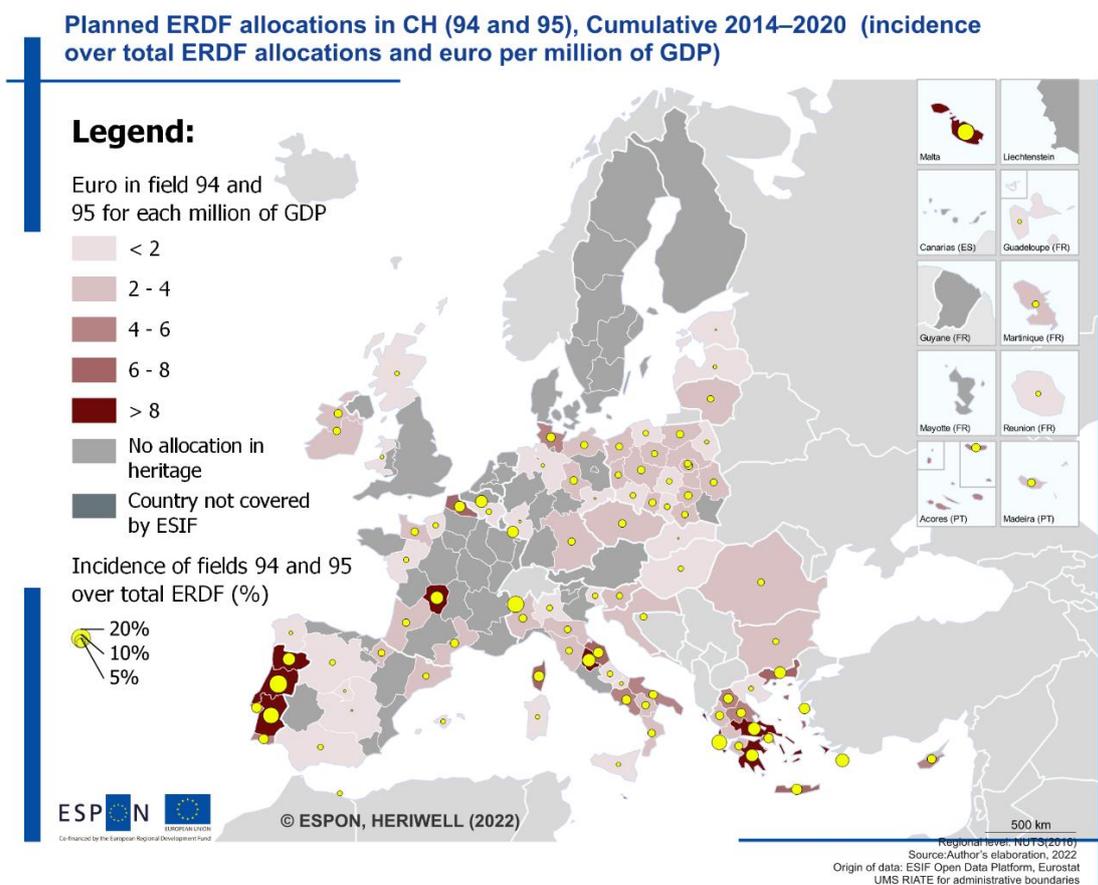
### Map 8.1. Planned ERDF allocations (excluding ETC) in intervention fields related to CH (94 and 95), cumulative allocations 2014–2020 (% incidence over total ERDF allocations, and euro per capita)



Source: HERIWELL Consortium based on ESIF Open Data Platform and Eurostat data for 2014–2020 average population. Accessed January 2022

Note: NUTS 0 for BG, CZ, HR, HU, LT, RO, SI, SK; NUTS 1 for BE, DE, IE, UK; NUTS 2 in all other MSs.

## Map 8.2. Planned ERDF allocations (excluding ETC) in intervention fields related to CH (94 and 95), cumulative allocations 2014–2020 (% incidence over total ERDF allocations, and euro per million of GDP)



Source: HERIWELL Consortium based on ESIF Open Data Platform and Eurostat data. Accessed January 2022  
Note: NUTS 0 for BG, CZ, HR, HU, LT, RO, SI, SK; NUTS 1 for BE, DE, IE, UK; NUTS 2 in all other MSs.

As managing authorities classify interventions discretely, some interventions on cultural heritage may be classified under other categories than 94 or 95, in addition, investments in CH may be financed under other ESIF funds (e.g. ESF or EAFRD). To address this issue and the lack of data on the number of CH projects, the HERIWELL country experts have been asked to carry out a mapping of the data available at national level, using keywords<sup>106</sup>. The mapping covers the number of projects and financial investments funded under ERDF – with the exclusion of ETC projects – and ESF and EAFRD in the national sources.

**The analysis of the national databases shows that overall, 6595 projects related to cultural heritage have been financed under ERDF (excluding ETC projects) in the 2014–2020 programming period. This is for total planned allocations of EUR 5.9 billion, equivalent to 3% of the total planned allocations.<sup>107</sup>**

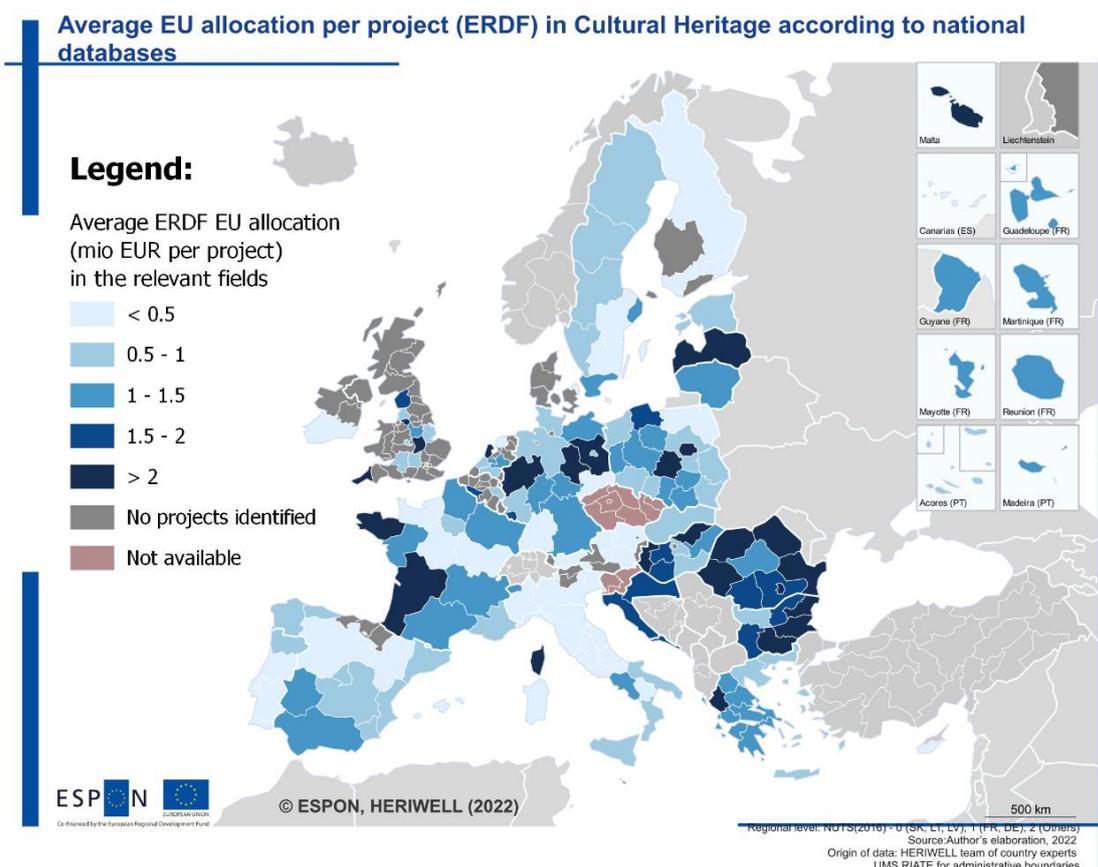
<sup>106</sup> Table 1.6 in Annex VIII.A (Chapter 1.2.2) presents evidence of the recognition conducted by the HERIWELL country experts on national databases available in their countries. The recognition shows that, while for ESF and ERDF information is available in most of the EU MSs, less information is available regarding the EAFRD.

<sup>107</sup> Some countries expert have provided data on planned allocation or on committed allocations, while other countries retrieved data on paid allocations or total expenditure. As the funding period considered (2014-2020) was close to the end when national data have been collected by experts, we decided to consider paid allocations as planned, accepting the possibility of small discrepancies between the two measures may exists. See methodological note in Annex VIII.A (Ch. 1.2.2).

Therefore, in most countries (excluding CY, IE and PT), the sum (at national level) of ERDF allocations for projects involving CH are greater than those registered in the ESIF Open Data Platform database under the 94 and 95 categories. This is because many projects dealing with CH are classified by managing authorities under other codes (see Table 1.7 in Annex VIII.A). In five countries (AT, DK, FI, NL and SE) some projects have been identified in national databases and none in the ESIF Open Data.

Average ERDF allocations per cultural heritage project, as identified by the country experts from national databases, are presented in Map 8.3 below, while Annex VIII.A presents maps on the number of projects and total allocations<sup>108</sup>.

### Map 8.3. ERDF (ETC excluded) average EU allocations per CH project according to national databases, cumulative allocations 2014–2020 (million EUR per project)



Source: HERIWELL Consortium based on data provided by the HERIWELL team of country experts

*Note: In Finland, in addition to NUTS 2 values, one project was identified at level of the region of MANNER-SUOMI (NUTS 1) for a total of EUR 77 314. In Italy, in addition to NUTS 2 values, eight projects were identified at national level for a total of EUR 44 886 112.50. In Bulgaria, in addition to NUTS 2 values, two projects were identified at national level for a total of EUR 55 765,993.19.*

*In AT, BE, DE, FI, HR, LT, LV, MT EU financing allocations have been estimated by multiplying total allocation (including national and regional contribution) by an average coefficient of EU financing.*

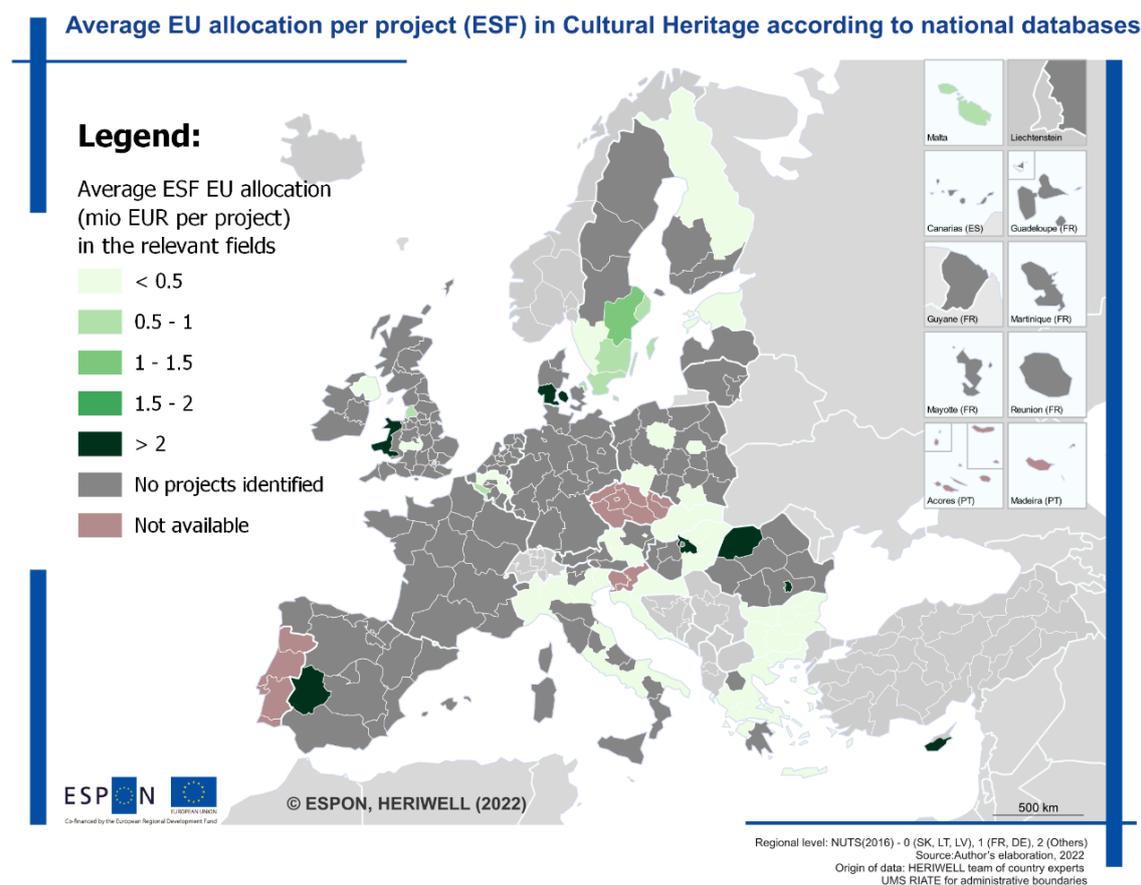
<sup>108</sup> While for the majority of countries it has been possible to collect information at NUTS 2 level, for France data are available only at NUTS 1 level. For Latvia, Lithuania and Slovakia, this is only at national level. Furthermore, in four countries (FI, IT, BG, SE), a number of projects related to cultural heritage have been identified in National Operational Programmes without any indication on how allocations have been distributed at regional level (for example, in Italy the NOP Culture and Development, and the NOP Metropolitan Cities).

### 8.1.2.2 ESF investments in CH

Some CH projects have also been funded under the ESF. The analysis of national databases by country experts shows that overall, **449 CH projects have been financed by the ESF in the 2014–2020 programming period. This is for total planned allocations of EUR 128 million, equivalent to 0.15 % of the total planned allocations on this fund.**<sup>109</sup>

Average allocations per project under the ESF in the relevant fields of cultural heritage, as identified by the national experts from national databases, are presented in Map 8.4. Annex VIII.A presents maps on the number of projects and total allocations.

#### Map 8.4. ESF average EU allocations per CH project according to national databases, cumulative 2014–2020 (million EUR per project)



Source: HERIWELL Consortium based on data provided by the HERIWELL team of country experts

Note: In Finland, in addition to NUTS 2 values, seven projects were identified at level of the region of Manner-Suomi (NUTS 1) for a total of EUR 1 335 533. In Sweden, in addition to NUTS 2 values, one project was identified at national level for a total of EUR 723 344. In Bulgaria, in addition to NUTS 2 values, eight projects were identified at national level for a total of EUR 1,139,114.499.

In AT, BE, DE, FI, HR, LT, LV, MT EU financing allocations have been estimated by multiplying total allocation (including national and regional contribution) by an average coefficient of EU financing.

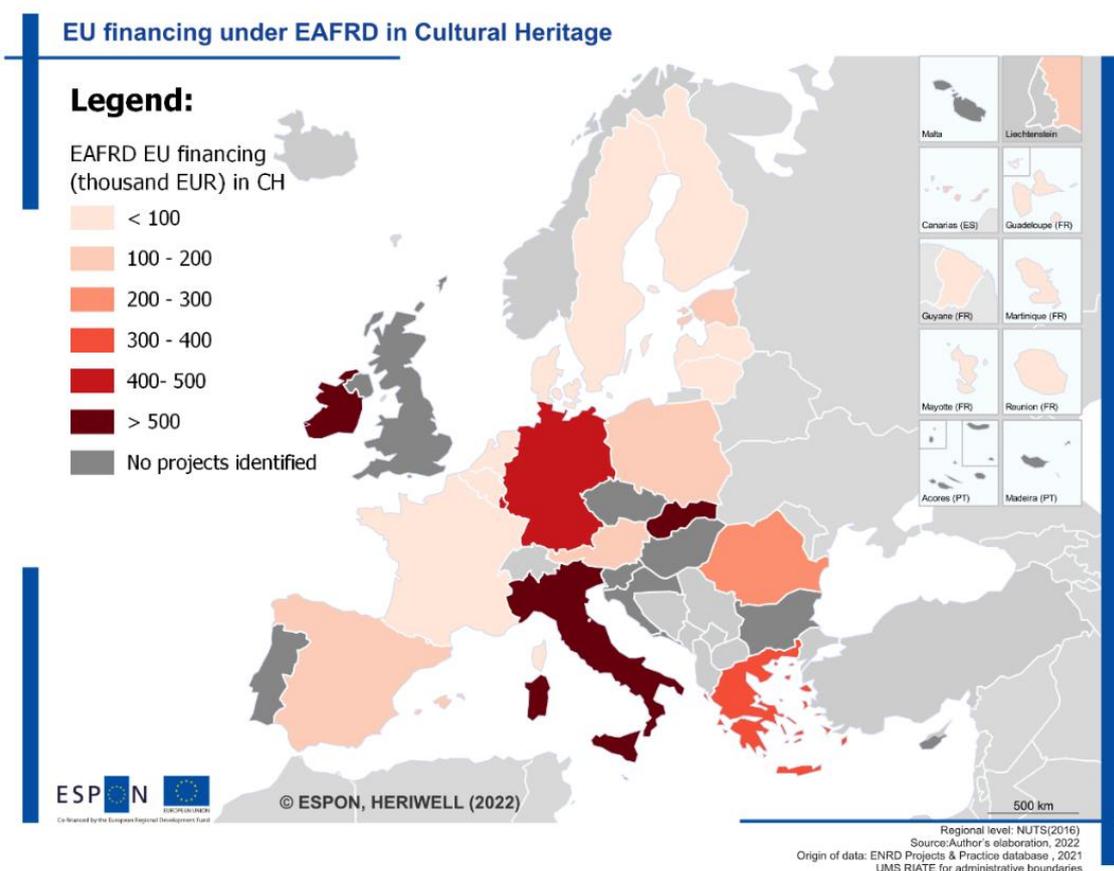
<sup>109</sup> Some country experts have provided data on planned allocation or on committed allocations, while other countries retrieved data on paid allocations or total expenditure. As the funding period considered (2014–2020) was close to the end when national data had been collected by experts, a decision was made to consider paid allocations as planned, accepting the possibility of small discrepancies between the two measures may exist. See methodological note in Annex VIII.A.

### 8.1.2.3 EAFRD investments in CH

The analysis of CH-related projects funded by EAFRD has been conducted on the basis of the database available on the ENDR online portal, in the section 'projects & practice'<sup>110</sup>, which provides data only at the national level.

The following map provides an overview of the allocations under EAFRD in the relevant fields of cultural heritage. EAFRD has financed projects in the field of CH in 19 countries, for a total amount of EUR 8.03 million. The countries with the largest allocations are Ireland (EUR 2.71 million), Italy (EUR 2.01 million) and Slovakia (EUR 830 494).

**Map 8.5. EAFRD planned allocations for CH-related projects, cumulative 2014–2020 (thousand EUR)**



Source: HERIWELL Consortium based on [https://enrd.ec.europa.eu/projects-practice\\_en](https://enrd.ec.europa.eu/projects-practice_en) Accessed in July 2021

Note: The ENDR database does not specify national allocations for multinational projects. To include multinational projects in the map, the total financed amount has been divided by the number of partners.

<sup>110</sup> It is available at [https://enrd.ec.europa.eu/projects-practice\\_en](https://enrd.ec.europa.eu/projects-practice_en) The ENRD Projects & Practice database only contains a limited number of selected EAFRD funded projects: hence, the total value of allocations in CH is underestimated. The methodology used can be described as follows: 1) Using the filters provided by the online portal, a first research was conducted to identify the projects that were classified under the keyword 'Culture'. Results of the research were then examined by reading the project summary sheets in pdf (available on the ENDR portal) to verify if they fell within the scope of the agreed definition of Ch. 2) The same procedure was followed for a second research, this time using a list of other relevant keywords (cultural heritage; museum; library; monument; protected building; church; religious buildings; archaeological site; archives; industrial heritage; cultural/historical event; rituals; festivities; traditional crafts; digital heritage; digital collections; digitisation of libraries, museums and archives). 3) A database with the relevant projects was created.

#### 8.1.2.4 ETC investments in CH

We also identified projects funded under the **European Territorial Cooperation** programmes (including interregional, cross-border and transnational programmes). To avoid duplication problems between the participating regions, it was decided to consider data registered in the online portal [keep.eu](http://keep.eu)<sup>111</sup>. This provides aggregated data on projects and beneficiaries of European Union cross-border, transnational and interregional cooperation programmes among Member States, and between Member States and neighbouring or pre-accession countries.<sup>112</sup>

Using the information available in the [keep.eu](http://keep.eu) portal on the partners' localisation (information is available at NUTS 3 level), it has been possible to sum up budget data at regional (NUTS 2) level. The following map provides an overview of the total allocations under ETC in the relevant fields of cultural heritage (as defined in the methodology described in Annex VIII.A).

**A total of 1085 projects in CH have been identified, for an eligible budget/expenditure of EUR 1.144 million for the 2014–2020 programming period.**

The countries involved in the selected ETC projects in CH include the 27 Member States, the UK, the four EFTA, the five Western Balkans countries and Turkey<sup>113</sup>. The analysis shows that overall, 264 regions (NUTS 2 level) have been involved.

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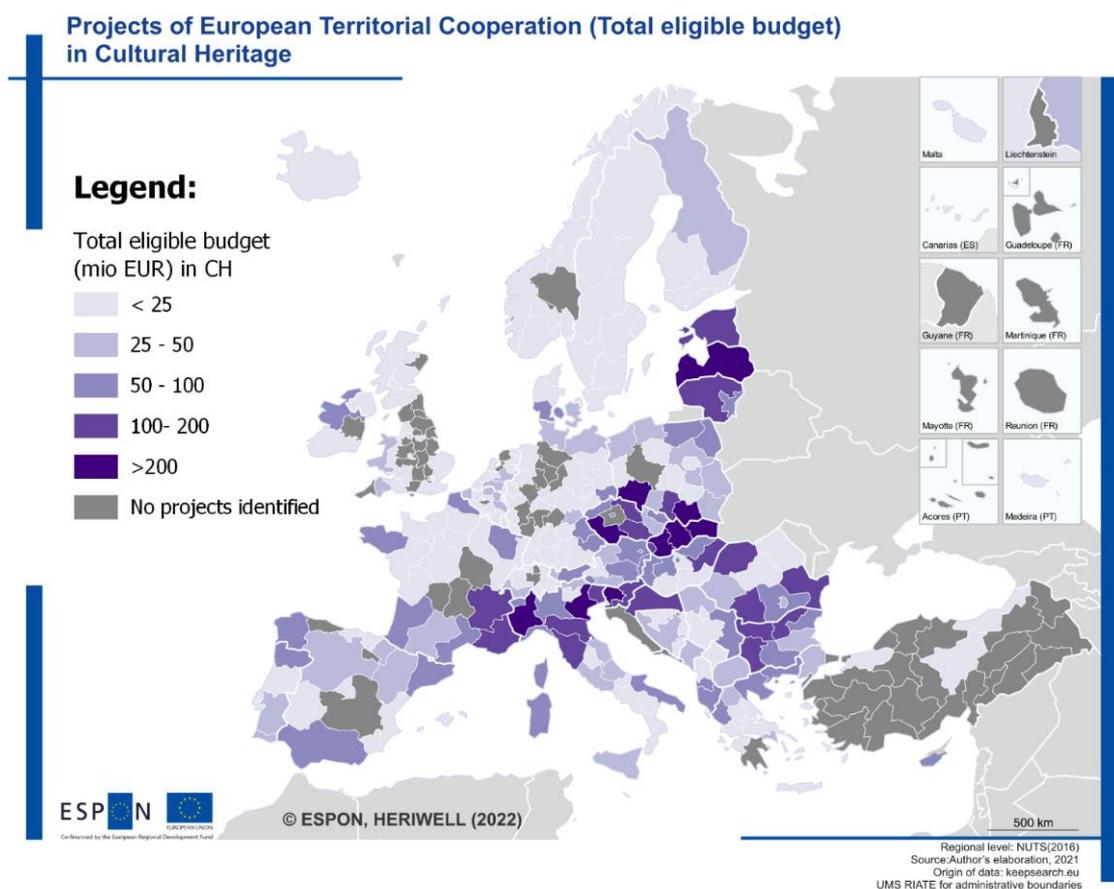
<sup>111</sup> The portal was queried with the following steps. **Step 1:** extrapolation of the projects for 2014–2020 classified under the theme cultural heritage and arts. **Step 2:** use of the keywords adopted for the ERDF/ESF mapping to double check if the database extracted in the first step was complete or not. **Step 3:** The database has been checked and cleaned to avoid duplications. **Step 4:** Checks have been made on selected additional projects (using keywords) to ensure they are linked to cultural heritage as framed in the HERIWELL project.

For the database, it is possible to make three types of selection: the list of lead partners, the list of partners and the list of calls. The list of partners, in particular, contains the following information: programme; acronym; project partner; lead partner; street; postal code; town; country; website; department; legal status; country code; NUTS 1 (or equivalent); NUTS 2 (or equivalent); NUTS 3 (or equivalent); total eligible budget/expenditure; ERDF budget; ENPI/ENI budget; IPA II budget; ERDF equivalent budget.

<sup>112</sup> The Interact Programme – with the support of the European Commission and the remaining Interreg, Interreg IPA cross-border, ENPI/ENI, and IPA-IPA cross-border programmes – built this database and maintains it, as part of its mission.

<sup>113</sup> We excluded countries such as Andorra, Armenia, Belarus, Canada, Egypt, Faroe Islands, Georgia, Greenland, Jordan, Lebanon, Moldova, New Zealand, Palestine, Russia, Tunisia and Ukraine.

## Map 8.6. European Territorial Cooperation: Total eligible budget in CH, cumulative 2014–2020 (million EUR)



Source: HERIWELL Consortium based on data provided by <https://keep.eu/> Accessed in June 2021

It is important to underline that the variable 'Total eligible budget/expenditure' includes both EU funding and other funding. To proceed with the analysis on the linkages between ESIF funding in CH and SWB, we considered only those projects also financed by the ERDF (in some cases they have also ENPI/ENI budget and IPA II budget). Among the 1085 CH projects mentioned above, 653 have received an ERDF contribution and have been considered for the analysis that follows<sup>114</sup>.

Using information available in the keep.eu portal on the partners' localisation at NUTS level, it has been possible to sum up the ERDF budget at regional (NUTS 2) level. The countries with at least one region with ERDF allocation on ETC projects in CH include the 27 Member States, the UK and five Western Balkans countries (with the exclusion of Kosovo).

Overall, 224 regions (NUTS 2 level) have been involved in ETC projects on cultural heritage with ERDF total allocations of EUR 779 million in the 2014–2020 programming period.

### 8.1.3 Interplay between CH and SWB in ESIF investments: results of a correlation analysis

The objective of this section is to explore the existence or absence of any relationships between EU investments in CH and SWB dimensions considered in the analysis.

A correlation analysis has been carried out considering ERDF allocations in cultural heritage for the period 2014–2020 resulting from ESIF Open Data Platform data in terms of (i) incidence % of CH allocations over

<sup>114</sup> For computing the number of projects mentioned, the list of partners database was used.

ESIF planned allocations, and (ii) ERDF CH allocations per inhabitants and a subset of the SWB indicators available at regional level (Annex VIII.A, Table 1.9).

Although the analysis, detailed in Annex VIII.A, shows a general low level of correlation, the correlation signs show a positive relationship between CH allocations and SWB. The low correlations are expected, due to the complexity of the relationship and the difficulty of grasping it at macro level. In addition, it is too early to detect significant results so that a stronger correlation could emerge over time.

For quality of life indicators, *ERDF allocations in CH are slightly positively correlated with the tertiary education attainment indicator (0.23<sup>115</sup>), the adult participation in lifelong learning indicator (0.37) and the good health indicator (0.19)*. However, there is also a positive, although low, correlation with air pollution, that may be related to the fact that investments in tangible heritage might be associated with high tourism attractiveness and increased pollution. This is underlined, for example, in some of the ECoC cases considered in Section 8.3 below, and also in the literature (e.g. Policy Learning Platform, 2020).

Considering the societal cohesion dimensions, *ERDF allocations in CH are slightly positively correlated with indicators on freedom over life choices (0.30), job opportunities (0.25), making friends (0.17) and volunteering (0.31)*. A slightly stronger positive correlation emerges in relation to the *quality of institutions (0.35)*. The analysis also shows that a *higher incidence of ERDF allocations in CH is associated with lower poverty risks (-0.20), severe deprivation (-0.31) and inequality (NEET rate -0.29 and employment gender gap -0.29)*.

As for material conditions, results show a low positive correlation between ERDF allocations in CH and the employment rate (0.24). The *correlation with GDP per capita is negative (-0.29)*, likely related to the ERDF allocation rule, with higher ERDF allocations in less developed regions.

Similar correlation results are obtained when considering the ESF and the ETC per capita allocations, according to the data collected by national experts (see Table 1.10 in Annex VIII.A).

## 8.2 Creative Europe investments in cultural heritage and linkages with societal well-being

### 8.2.1 Creative Europe investments in CH: methodology

The Creative Europe programme funds some special actions targeting CH. According to the Commission's mid-term evaluation of the Creative Europe programme, in the period 2014–2016 it delivered an estimated 4 200 activities. Around 89 % of these focused on common creation of artworks, and reached an estimated 8.83 million people. They contributed strongly to transnational mobility of creative and cultural players as well as enabled cooperation between EU and third-country cultural organisations. Even though Creative Europe is a secondary source of funding for CH investments, it includes some special actions and regular funding that target CH and foster impacts on some dimensions of societal well-being.

According to the European Commission's project database for the Creative Europe Culture sub-programme, 4 451 projects in the cultural and creative sectors have been funded in the programming period 2014–2020. The database contains descriptions of all projects funded under the Creative Europe – Culture sub-programme and some of the projects financed under the Creative Europe – MEDIA sub-programme. Relevant available information for each project is: funding year, start date/end date, project summary, coordinator's country, partners' countries and expected funding. **Only the Creative Europe Culture sub-programme** has been considered in this study. The **database does not provide any information on the investments by type of sector or topic (e.g. cultural heritage) and does not allow a categorisation of projects** according to their topic(s) or investment sectors. Therefore, to identify the projects related to CH

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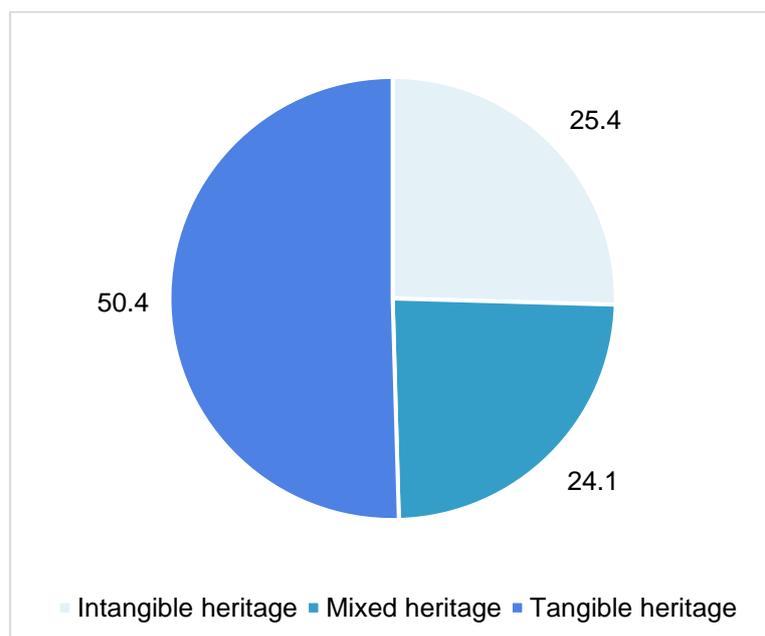
<sup>115</sup> This is a measure of linear correlation between two sets of data. It is the covariance of two variables, divided by the product of their standard deviations; it is essentially a normalised measurement of the covariance, such that the result always has a value between -1 and 1

investments, a **manual search of the database was made first through selected keywords**<sup>116</sup>. A **qualitative data cleaning** was then carried out to avoid duplicate projects, or to include projects not dealing with CH or not relevant for the aim of this study<sup>117</sup>. Each project in the final list to be analysed was then **associated to one of the HERIWELL macro-categories of CH** (tangible, intangible, digital). All projects were analysed in terms of number and funding, taking into account the project's coordinator. Finally, the selected projects were qualitatively assessed according to the potential impact on the SWB dimensions (quality of life, societal cohesion and material conditions) identified in the HERIWELL Theory of Change.

### 8.2.2 Creative Europe investments in CH: main findings

Following the above methodology, it was possible to select **224 projects related to CH investments**<sup>118</sup>. As shown by the following figures, half of them are linked to investments associated to tangible heritage (50.4 %), while the remaining half is equally divided between intangible and mixed heritage.

**Figure 8.2. Number of projects by CH typology (%)**

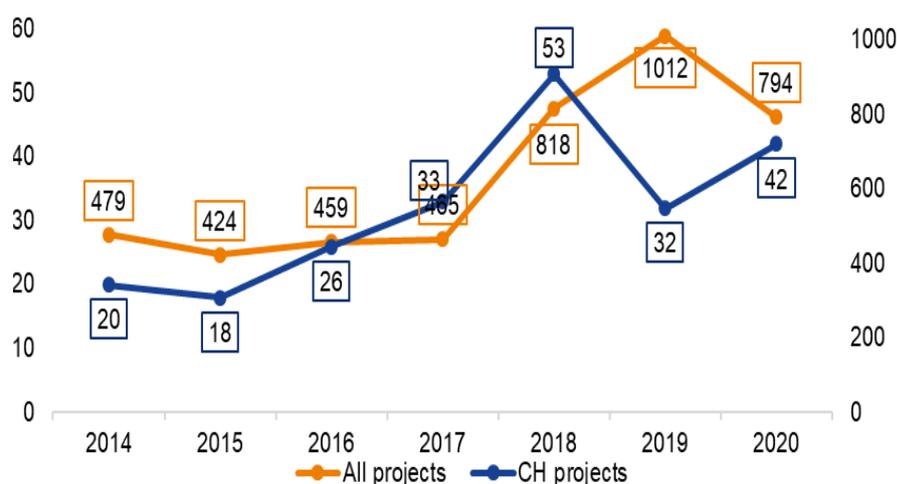


Source: HERIWELL Consortium based on Creative Europe data

<sup>116</sup> To include the largest amount of potentially relevant projects, the keywords 'heritage', 'archaeological site', 'archives', 'cultural events', 'digital collections', 'digitisation of libraries', 'digitisation of museums', 'historical events', 'library', 'monument', 'museum', 'religious building', 'rituals', 'traditional arts', 'traditional crafts', were used. The terms were searched among the following actions: networks, platforms, cooperation projects and translations.

<sup>117</sup> For example, using the key term 'heritage' in the automatic extraction, also extracted files including the keyword 'heritage' to signal that 'This project does not focus specifically on cultural heritage'. The manual data cleaning allowed the deletion of these projects from the final list of the projects to be analysed.

<sup>118</sup> The automatic search based on keywords led to the extraction of 1189 projects. The automatic search based on keywords led to the extraction of 1189 projects. Following data cleaning, 224 projects were finally selected. Lead partners cover the following countries: UA, GE, MT, LU, BG, LV, RS, LT, MK, PL, SE, DK, FI, PT, CZ, RO, IE, EL, HR, SI, HU, NO, UK, IT, NL, ES, AT, FR, BE, DE. Data extraction refer to 30 of June 2021.

**Figure 8.3. Number of CH projects, by year of concession**

Source: HERIWELL Consortium based on Creative Europe data

Out of this sample of 224 projects, the number of funded projects across the years went from a minimum of 18 projects in 2015 to a maximum of 53 projects in 2018, coinciding with the European Year of Cultural Heritage with some specific calls.<sup>119</sup> The number of funded CH projects shows a similar trend with the other projects financed by the Creative Europe programme, with the exception of 2019.

The 224 projects' duration varied according to the nature of projects: 26.8 % lasted less than 12 months, 33.9 % between 13 and 24 months, and around 40 %, more than 24 months.

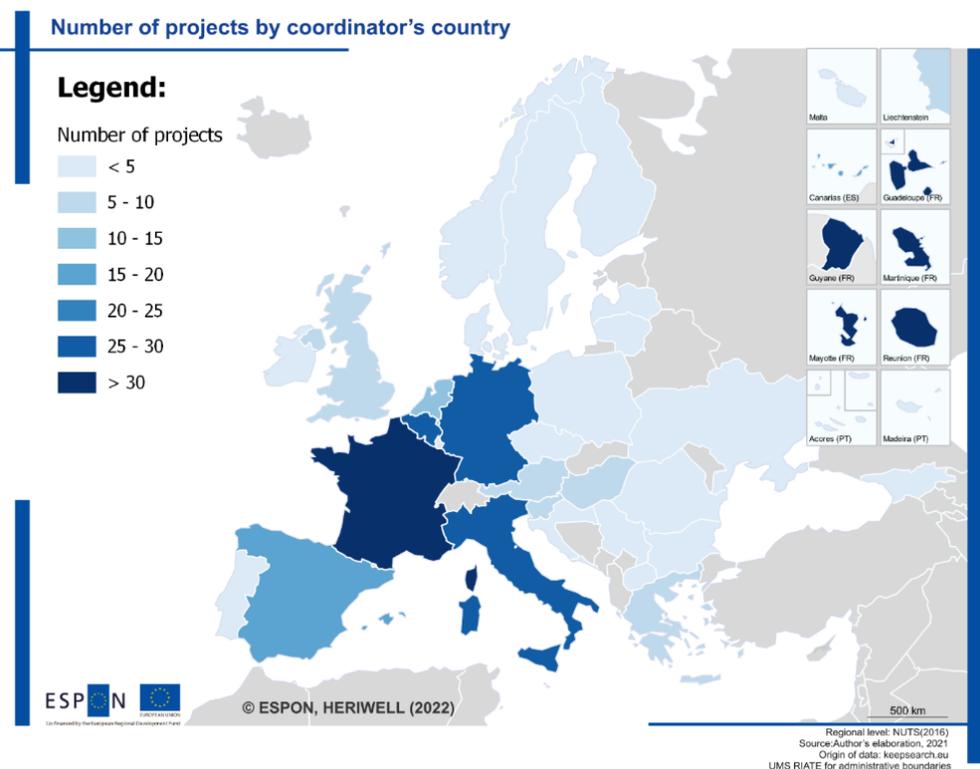
Projects financed under different actions imply a different partnership asset and different funding timing and modalities. However, the maps below provide a picture of the capacity of specific countries in leading projects, showing the distribution of projects and the total amount of expected funding by the coordinator's country. This provided a **proxy** for where the Creative Europe financing might have had a greater impact in financing CH.

As can be seen, FR (36 projects), BE (29 projects), IT (28 projects) and DE (26 projects) are the countries in which coordinators and network, platform or association are located for the highest number of the projects associated with CH. They are also (with the exception of Italy) those where the project were expected to receive the highest amount of financing (FR, BE and DE) with more than EUR 6 million in the 2014–2020 period<sup>120</sup> (Maps 8.8 and 8.9). Taking into account all the selected projects, the average funding per project is EUR 327 047.37.

<sup>119</sup> [https://www.eacea.ec.europa.eu/grants/2014-2020/creative-europe/support-european-cooperation-projects-2018-and-support-cooperation-projects-related-european-year\\_en](https://www.eacea.ec.europa.eu/grants/2014-2020/creative-europe/support-european-cooperation-projects-2018-and-support-cooperation-projects-related-european-year_en)

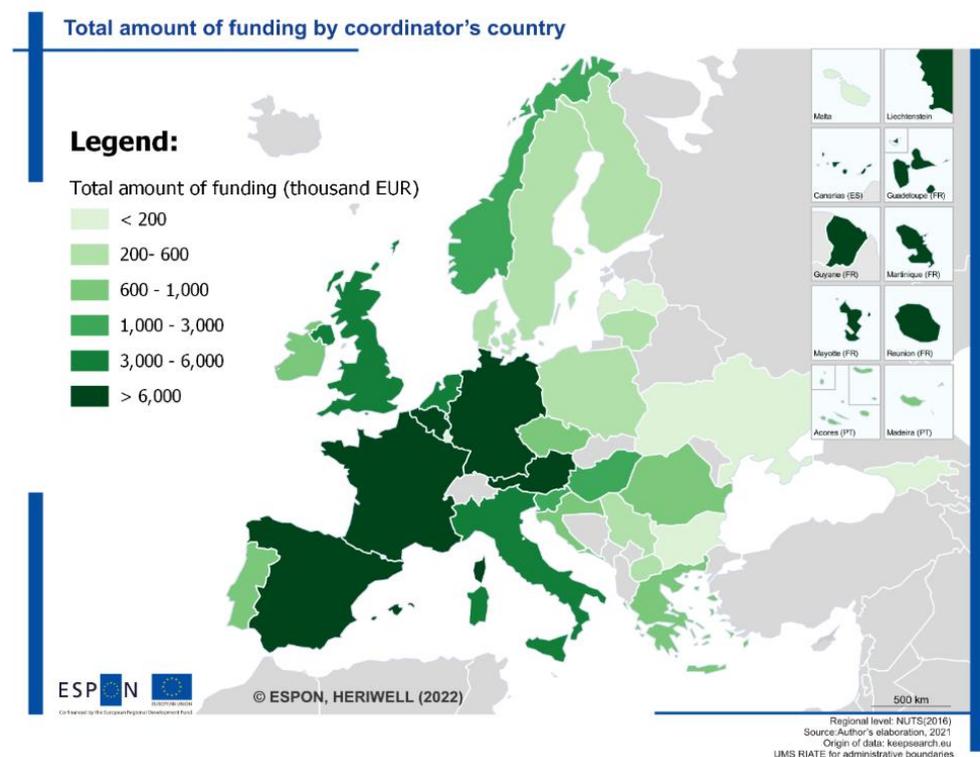
<sup>120</sup> Calculations are made with regard to the expected funding of the project coordinators.

**Map 8.7. Number of projects by coordinator's country**



Source: HERIWELL Consortium based on Creative Europe data

**Map 8.8. Total amount of funding by coordinator's country**



Source: HERIWELL Consortium based on Creative Europe data

Unfortunately, the available data do not allow a disaggregation by project partners, nor do they establish the effective amount of received funding. However, the selected projects can be classified according to CH

investments by the number of partner countries (size of consortia)<sup>121</sup> and by the overall amount of expected funding<sup>122</sup>.

Larger projects (in terms of funding and size of the partnership) are expected to have a higher probability of producing wider impacts in terms of territorial coverage. This does not mean, however, that projects with relatively low budget or number of partners are less relevant than the larger projects.

Taking into consideration the intensity of the funding and the size of the partnerships, the selected 224 projects can be classified into: those with potential narrow impact (135 projects with low-medium amount of financing and low-medium consortium dimensions); those with potential medium impact (60 projects with high financing but with small–medium consortium dimensions); and those with potential wide impact (21 projects with high amount of financing and medium-high consortium dimensions) (See Table 8.1). It must be underlined that this classification is referring to the 224 selected projects which were funded under different typologies of actions. Thus, it could be, for example, that some projects with a small dimension and a low amount of financing belong to recurring programmes carried out by networks.

**Table 8.1. Classification of the selected projects by financing and consortium dimensions**

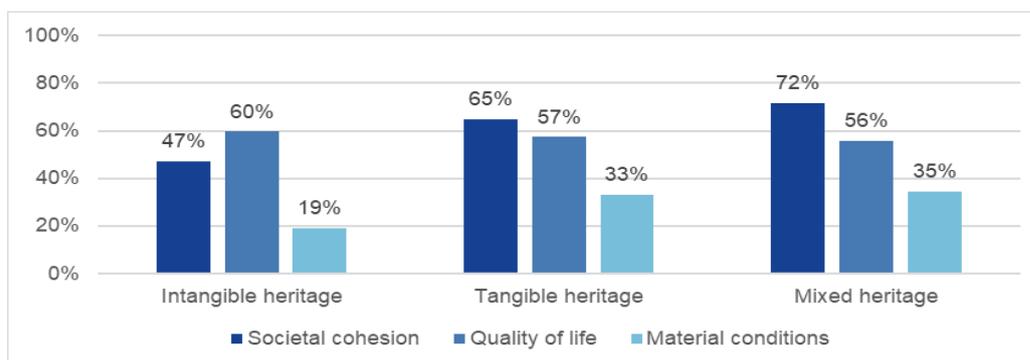
		Amount of financing			Total
		low	medium	high	
Consortium dimensions	Small	21	41	62	124
	Medium	73	2	3	78
	Large	4	2	16	22
	Total	98	45	81	224

Source: HERIWELL Consortium based on Creative Europe data

Finally, the selected projects were associated with one or more of the potential impacted macro-dimensions of social well-being: societal cohesion, quality of life and material conditions. This was done on the basis of a **qualitative assessment** of the information included in the project description.

According to this qualitative assessment, out of the selected 224 CH-related projects 64 % had a potential impact on societal cohesion, 57 % on quality of life and 30 % on material conditions<sup>123</sup>. As Figure 8.4 shows, the dimension of material conditions is the least potentially impacted by Creative Europe projects. On the contrary, most of the projects might have positively impacted the societal cohesion dimension, in the context where they were implemented.

**Figure 8.4. Percentage of projects impacting on SWB macro-dimensions, by typology of heritage**



Source: HERIWELL Consortium based on Creative Europe data

<sup>121</sup> Identified as small (projects involving partners from at most three countries), medium (projects involving from four to six partners), large (projects involving partners from more than six countries).

<sup>122</sup> Independently from the threshold to which projects should refer, for this analysis we identified as low-scale projects those receiving less than EUR 50 000, as medium-scale those receiving between EUR 50 000 and EUR 100 000, and as high-scale, projects receiving more than EUR 100 000.

<sup>123</sup> A project might impact on more than one dimension, so the shares are not summing up to 100.

## 8.3 Investments in cultural heritage and societal well-being in the European Capitals of Culture

### 8.3.1 Methodology

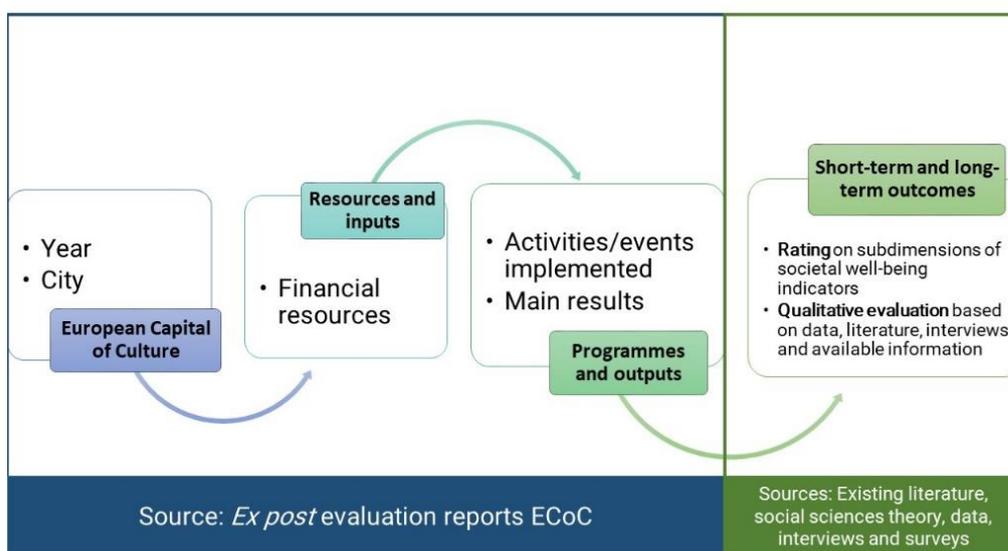
The ECoC initiative aims at promoting and celebrating Europe's rich cultural diversity and heritage, mutual understanding and intercultural dialogue, and to put cities at the centre of cultural life across Europe. The ECoCs receive various types of funding, e.g. national funding, ESIF funding and Creative Europe funding (such as the Melina Mercouri International Prize for the Safeguarding and Management of Cultural Landscapes).

The initiative includes several types of interventions, among which are the refurbishment and valorisation of CH.

The full analysis of the contribution of CH investments to SWB is hindered by the limited comparable quantitative data on its effects. The evaluation reports available for the 2014–2019 period often contain only narrative information and lack a benchmark of achieved results against the ex ante situation. Therefore, a **qualitative meta-analysis** has been carried out to shed light on ECoC's CH objectives and results, and to assess their potential impacts on SWB.

The qualitative meta-analysis started from the identification of the **overall financial resources received by the ECoC during the title year**, and the **main events, actions and activities implemented**. Particular reference was made to CH, and the **main results** reported to the extent possible considering only the activities related to CH<sup>124</sup>. According to the information available on financing resources, events and activities implemented, and observed outputs, an **evaluation framework** was defined. This provides an **overview of how the three dimensions of SWB** (quality of life, societal cohesion and material conditions) are potentially valorised by the ECoC actions.

**Figure 8.5. Methodology for evaluation of European Capital of Culture programme under the Theory of Change**



Source: HERIWELL Consortium

The qualitative assessment used data included the ECoC evaluation reports, covering the capitals financed between 2014 and 2019. Eight ECoCs were selected, which proposed in their application a specific focus on CH: **Umeå, Riga, Mons, Wrocław, Paphos, Valletta, Matera and Plovdiv**. More details on the motivation for the choice of these eight capitals of culture are provided in Annex VIII.B.

<sup>124</sup> Due to the narrative structure of the reports, the information is not available in terms of quantitative indicators. However, any available quantitative data is documented in addition to qualitative information.

The information collected through the desk analysis was complemented by information and data collected through interviews with ECoC representatives at local level. The findings were validated through an online workshop with experts and representatives of some of the analysed ECoCs. In addition, the workshop provided information on the **main strengths** of the programme, **main obstacles** encountered and **policy implications** for replicability.

### 8.3.2 Main findings

In the following paragraphs the main results emerging from the evaluation reports, interviews and the online workshop are presented; further details on the outputs, results and inputs are provided in Annex VIII.B.

The analysis of ECoC collected data allowed the identification of the main CH outputs and results achieved by the eight selected cities. It also showed the potential linkages between CH and SWB in these cities. Even though the analysis focuses on CH, the results and SWB outcomes should be interpreted in the context of the wider cultural strategies pursued by the ECoC cities. The workshop participants underlined how the **success and effectiveness of ECoC programmes were strictly linked to city-specific strategies and plans**, taking into account territorial needs and potentialities, as well as the role of local communities.

**All of the considered capitals used the opportunity of being ECoC to achieve important results, mainly related to tangible CH. Two out of the eight cities, Umeå and Paphos, focused more on ICH.** Among the eight cities, **Mons and Matera also paid particular attention to digital CH.**

In **Umeå**, the ECoC programme envisaged an active involvement of the Sámi community for the valorisation of their traditions and CH. In **Paphos**, attention was focused on the Cypriot cultural melting pot (e.g. the revitalisation of Cypriot ancient myths of Paphos with other European cultural stakeholders, as well as Egyptian, Israeli and the Turkish-Cypriot stakeholders). The **Umeå case** provides interesting indications on the conflicts that may arise when dealing with CH. Disputes over the use of the Sámi ICH emerged in this case initially from the Sámi minority, which felt left out of the decision-making process. They also felt exploited for territorial branding reasons, and subsequently the Swedish majority felt that the Sámi heritage was over-represented. Even if contested, the ECoC Umeå allowed for a recognition of the Sámi heritage as a place in the identity of the city, and for questioning the power relations in the city. As a result of these conflicts, some moves towards 'widening the democratic processes towards the greater inclusion of Sámi interests and respect for Sámi culture' (Hudson et al., 2019: 576) have been made. This has relevant implications for the quality of democratic processes and active citizenship of all citizens.

In **Mons**, the 'digital' approach of the programme aimed to find new ways to use the technology. This was in the context of reducing the social and digital divide, empowering citizens, creating new forms of artistic expression and new economic models, and bringing people together. The digital projects such as Café Europa related directly to the overall development strategy of the city based on growth of culture and the development of hi-tech enterprises. Investments in digital CH are part of the wider framework 'Digital Innovation Valley' for hi-tech development in Mons.

In **Matera**, the I-DEA (Institute of Demo-Ethno-Anthropological Archive) project aimed to digitise the existing archives of the Basilicata region in Italy and make them publicly available and easily accessible for all. The archive collected a large number of public documents, but also material from private collections and cultural associations. The project also mapped oral memories from the city and the region, which contributed to documenting the cultural (TCH and ICH) aspects of the region. In practical terms, the institution did not physically centralise these collections but instead linked them to a central network working as a point of access for all citizens.

In the other cities, outputs and results were mainly related to the revitalisation and promotion of ancient buildings, including cases of contested heritage. For example, in **Rīga** one of the success stories is the reinvigoration of Stūra māja (ex-KGB building) and its filling with cultural content (e.g. exhibition by the Museum of the Occupation; guided tours of the KGB cellars). The building created extensive public debate on historical issues and attracted record interest (85 645 visitors). In addition, many events were held outside traditional cultural venues and outside the city centre, which was considered by stakeholders as one of the most significant achievements of the Rīga 2014 ECoC. The sustainability of these benefits was ensured by the Rīga City Council through the 'Co-funding programme for Creative Quartals and Territories'. Furthermore, in 2017 the 'Mobile Cultural Space Beehive' was created to ensure the further decentralisation of cultural activities, in particular in neighbourhoods not disposing of cultural venues.

In a similar way, in **Plovdiv** the main funded activities focused on CH preservation and promotion through, for example, the restoration of the Bishop's Basilica of Philippopolis and the Late-antiquity mosaics of Plovdiv. Also noteworthy is the renovation of the central city square as a seat of all cultural heritage periods of the city of Plovdiv, including the Roman Forum of Philippopolis.

In **Valletta**, one of the most significant targets achieved in CH promotion and valorisation was the 'Valletta Design Cluster'. This has shed light on the importance of requalifying built heritage into contemporary uses that are true to their original function. Another relevant result was the increase in the capacity of cultural heritage stakeholders.

In **Wrocław**, a number of interventions in infrastructure were only possible because of the ECoC funds. In addition, Wrocław devoted a whole strand in its programme to architecture, which, according to interviewed experts, was particularly relevant for dealing with the city's identity, narrative and heritage. Another legacy of the Wrocław ECoC regards the decentralisation of cultural activities and CH through the creation of cultural points around the city, managed by NGOs and supported by the municipality.

In **Mons**, five museums and the Beffroi (closed down for 30 years) opened or re-opened on the occasion of ECoC 2015.

Two other results can be identified in all analysed capitals: **improved accessibility and a higher engagement of citizens in heritage**. These effects were also reported by all the participants in the online workshop, who noted the importance of ECoC year in attracting citizens usually not engaged in cultural activities.

Concerning the **accessibility of places**, some significant results were achieved in **Valletta** through the increased accessibility of cultural venues and CH for people with disabilities. Furthermore, interviewees point out that, in Valletta, future ideas emerged on increasing the accessibility of CH through making it part of the living and walking routes people use (e.g. use of the MUŻA museum as an access between two key areas in Valletta).

The quality of buildings was also tackled (e.g. in **Paphos, Rīga, Valletta and Mons**), through refurbishment processes, also ensuring their accessibility.

**Accessibility for socially disadvantaged groups** was addressed in different ways:

- targeting cultural and heritage activities to social groups that were previously never engaged in the cultural life of the city in **Plovdiv, Rīga, and Mons** (i.e. the Roma minority, young people from deprived neighbourhoods, older people from smaller towns and villages, prisoners, people with disabilities, and in Rīga people not attending cultural activities);
- moving culture outdoors and outside traditional cultural spaces to bring them closer to people and also to 'tame' unknown heritage in the **Wrocław** case;
- increasing free access to cultural and heritage activities in **Rīga**;
- use of traditional (TV and radio) and digital communication channels to make cultural and heritage activities accessible to people in **Rīga and Plovdiv**;
- connecting cultural heritage to existing local networks to increase its accessibility in **Matera**;
- combining entertainment and educational activities to make cultural and heritage activities more interesting in **Plovdiv and Matera**.

**With regards to citizens' and stakeholders' engagement in cultural activities**, interviews show that ECoC contributed to enhancing citizens' participation as co-creators in cultural and heritage activities. In Rīga ECoC one in four events saw the participation of citizens as co-creators; in Valletta ECoC citizens were engaged as co-creators through several specific initiatives; in Paphos ECoC, CH was instrumentalised to create culture through the interaction between the visitors and local inhabitants – citizens' active engagement was deemed essential for the effectiveness of ECoC; in Wrocław ECoC, the 'participatory approach to the issue of creating cultural policy seems to be a process internalised by a large part of the cultural sector in Wrocław' (Sanetra-Szeliga et al. 2020: 167). In Matera, around 57 000 citizens have been directly involved in cultural production. According to interviewees, co-creation and co-production are particularly relevant for achieving SWB outcomes. For instance, a study on co-creation in **Matera** ECoC reveals that 'the participatory processes in the context of MCEC 2019 have, overall, generated significant positive effects,

both in terms of involvement and of participatory awareness, positively affecting the psychological well-being of citizens' (Sacco et al., 2020). In particular, Sacco et al. (2020) underline that co-creation in Matera ECoC has resulted in an increased interest in actively participating in cultural activities, personal growth, confidence in others and increased collaboration among participants in the co-creation processes, feelings of pride and increased life satisfaction.

However, the **Umeå** case reveals that for cultural participation to produce SWB outcomes the following aspects should not be neglected: active participation of under-represented groups (e.g. the Sámi minority); active involvement of participants from the design of the policy agenda phase; ensuring equality between the owner of the participatory process and the engaged participants; and embedding of the decisions taken during participatory processes in the policymaking process (Hudson et al., 2017). Participatory processes are aimed to democratise the decision-making processes and, hence, question power relations in society. In the Umeå case almost half of the projects (40 projects out of 83) involved the use of co-creation in the cultural and heritage field to bring people together and foster social capital (34 projects out of 83) (Hudson et al., 2017). Only in 9 projects (out of 83), was it used to change power relations in the city, revealing the need for a further meaningful use of co-creation in the cultural policy arena (Hudson et al., 2017).

### 8.3.2.1 Interplay between CH and SWB in the ECoC cases

As noted in figure 8.6, in the analysed cities **CH presents linkages with all the three dimensions of SWB**. In particular, a **strong link between CH and societal cohesion** can be noted. CH seems to affect almost all the sub-dimensions of societal cohesion in nearly all eight capitals, but for trust showing a relation with heritage only in Rīga and Matera.

**Figure 8.6 Linkages between cultural heritage and societal well-being in a sample of eight ECoCs**



Source: HERIWELL Consortium based on ECoC evaluation reports and interviews, and workshop with ECoC representatives, 2021

As detailed in Box 8.2, **the valorisation of CH resources for SWB purposes is not free of conflicts**, as the Umeå ECoC case shows. Thus, particular attention should be paid on the one hand to **what and whose heritage is valued, and on the other hand to the active engagement of all citizens**. According to the participants in the workshop, the first element is particularly relevant for ICH, which is usually harder to be defined and valorised.

The online workshop with ECoC representatives confirmed the links between the ECoC programme and societal cohesion, highlighting the **role of the programme in building ‘community’ in its broader sense**. This happened especially through the involvement of people in volunteering activities and in co-creation processes. In **Umeå**, great attention was given to the issue of gender equality, with the inclusion of women’s performances and representation in culture. In addition, the programme combined CH with sport and physical activity, as drivers of inclusivity and cohesion. **Paphos** as well benefited greatly from the cultural model of openness that ECoC promoted.

## Box 8.2. Linkages between cultural heritage and societal cohesion in the eight selected ECoC cities/towns

Interviews and workshops with ECoC representatives point out the relevant effects of heritage on *community engagement and volunteering*. In **Plovdiv**, more than 2000 volunteers were involved in activities implementation, especially young people and people with marginalised backgrounds; the role of volunteers was also fundamental in Mons. **Paphos ECoC** mobilised 350 local and international volunteers; **Matera ECoC** engaged 600 volunteers; **Valletta** devised a specific volunteering scheme that attracted several non-Maltese participants; **Rīga ECoC** engaged 3700 volunteers. In addition, in **Matera**, the ECoC year resulted in a connector between people from central and marginalised areas. The latter are usually excluded from the cultural production and participation, which made them more aware of and responsible towards CH.

ECoC triggered a *sense of identity and belonging* in particular through the discovery of unknown CH. In one case (**Umeå**), identity was strengthened within a conflicting process over the valorisation of intangible heritage of minorities (Sámi). Umeå ECoC participants in the online workshop identified this conflict as 'productive' rather than 'disruptive'. A similar conclusion is also reached for **Matera ECoC**, where the 'staging' of past ways of urban living in the area risks displaying elements of staged authenticity (MacCannell, 1973; Ponzini et al., 2019) and 'Disneyfication', ignoring different 'narratives of the Sassi, for example the values and meanings that younger generations attribute to them' (Politecnico di Milano et al., 2020: 52). In **Paphos**, the survey undertaken within the ECoC evaluation reveals that 43.7% of those who attended ECoC activities showed a desire to interact more with other cultures, compared to only 24% of those who did not attend ECoC activities. In **Wrocław**, an important contribution of CH to creating identity and sense of belonging occurred through the rediscovery of its unknown CH (e.g. German material heritage), as, for many years, Wrocław inhabitants had 'a memory prosthesis' (ECoC interviewee). It has also contributed to changing the perception of contested heritage in Wrocław, which is increasingly reevaluated. In **Valletta**, a 2018 survey shows that the ECoC contributed to the feeling of proudness of Valletta residents more than of those living outside Valletta (Valletta 2018, 2018). In **Mons**, 67% of the KEA surveyed respondents believed that Mons 2015 helped to develop a greater sense of belonging and pride among the people of Mons (KEA, 2016).

CH also contributed extensively to *fostering inclusivity* in both the heritage field and, more generally, in society. For instance, in **Umeå** the rediscovery of its colonial past and the Sámi heritage provided an opportunity for fostering the inclusion of the Sámi minority. **Paphos ECoC** transformed the 'openness' concept of ancient Greeks into a model of modern cultural development. In **Rīga**, the ECoC programme had an impact on social integration, according to the interviewees. In **Valletta**, the ECoC contributed to fostering social inclusion, in particular for people with disabilities (Valletta 2018, 2018). In **Mons**, 68% of the surveyed people consider that ECoC Mons was beneficial to social inclusion of disadvantaged categories (KEA, 2016).

Source: HERIWELL Consortium based on data gathered by country experts

Heritage seems to also have a **significant relation** with **material conditions**. Heritage contributes to **enhancing territorial attractiveness** in all analysed ECoCs and to **jobs and earnings** in five out of the eight considered ECoCs. This is not a surprise as the value of CH for the regeneration of urban and rural territories as well as for economic growth has been extensively acknowledged in the literature (OECD, 2021; ESPON, 2019; European Parliament, 2019). However, as detailed in Box 8.3, the **valorisation of heritage for economic development purposes is ambivalent**. In the absence of a social and environmental sustainability-led strategy, it may create negative effects for residents (e.g. increases in housing prices and shortage of housing, concerns over the 'faking' of the identity of a territory, pollution). To mitigate such effects, policymakers should take into consideration that 'social life in public spaces is a fundamental contributor towards individual and social quality of life' (Valletta 2018, 2018: 155). In addition, 'renewal of heritage through restoration and recuperation and its integration in today's cities should take place in the wider context of changing demographic and societal realities.' (ECoC interviewee).

### Box 8.3. Linkages between heritage and material conditions in the analysed ECoCs

ECoC contributed to *increasing employment and business opportunities* in the ECoC areas. In **Valletta**, stakeholders point out that funding received for the ECoC had a multiplier effect, attracting other investments: e.g. following ECoC Valletta, 8000 jobs were created in different sectors; an economic impact exceeding EUR 325 million was produced, resulting in a GDP growth of 2.23 in 2018 (Valletta, 2018). However, interviewees underline that an improvement of CH linkages with the other economic sectors (e.g. ICT, primarily services, advertising, marketing research) is needed, as well as the provision of domestically produced competitive inputs. In **Wrocław**, heritage projects contributed to ‘the search for a new basis for city development’ (EccT01, Wrocław 5 June 2019) and the need to modernise (Sanetra-Szeliga et al., 2020: 147).<sup>125</sup> In **Mons ECoC**, the estimated economic return was EUR 5.50 for every EUR 1 invested by the regional authorities (Mons 2015 Foundation). Furthermore, ECoC had positive economic consequences for the local economy (KEA survey of the Mons 2015 Entreprises Club). This was linked to different factors such as increased visibility for local enterprises, new business settlements and a more competitive business environment. In **Plovdiv**, each euro invested in CH brought back up to EUR 10 in businesses (HERIWELL ECoC workshop, 2022). ECoC also contributed to *territorial attractiveness and branding*. This has occurred in almost all analysed capitals, in particular through urban refurbishment, revival of peripheral and neglected areas including heritage sites and places, and the development of new cultural attractors (e.g. museums, arts centres). In **Wrocław**, ECoC brought about a relevant increase in the number of tourists (five million tourists during the ECoC) and in the positive perception among Polish people of Wrocław and the investments made in cultural heritage (ECoC interviews). ECoC is thus considered an asset of local development. In **Rīga ECoC**, neighbourhood activities resulted in improvements in territorial attractiveness, especially of some neglected areas. The ECoC legacy continued after ECoC Rīga with the support of the City Council, which has since resulted in a significant improvement of Rīga. **Valletta ECoC** opened opportunities for the valorisation, restoration and reintegration in the built fabric of Valletta for a number of heritage assets that were marginal to the dominant and mainstream heritage narrative. Valletta also benefited from a considerable increase in tourism, although this brought *several negative effects* (e.g. concerns about the loss of the identity of the city, increases in property and rental prices which exacerbated concerns over the displacement of Valletta residents, in particular those from marginalised groups) (Valletta 2018, 2018). Ambivalence of the contribution of cultural heritage to territorial attractiveness and branding are also expressed in the ECoC **Umeå** case, where grassroots organisations had concerns over the squeezing out of the counterculture identity of Umeå due to a high focus on culture’s role in generating economic growth and city development (Hudson et al., 2018). Furthermore, the renovation of buildings has also resulted in increased rental prices, making their use more difficult for youth entrepreneurs in the cultural sector, including heritage. In **Mons**, 86 % of the surveyed residents of Mons felt that the ECoC had been a positive event, triggering the transformation of Mons (KEA, 2016). ECoC Mons also put Mons on the national and international touristic destinations. An increase in territorial attractiveness has also been noted for **ECoC Matera**, and also for in **ECoC Plovdiv**, along with tourism. In ECoC Plovdiv, cultural tourism was particularly relevant for the development of the creative industries sector (HERIWELL ECoC workshop, 2022).

Source: HERIWELL Consortium based on data gathered by country experts

During the HERIWELL ECoC workshop cultural tourism, its importance for the territory and the issue of tourists as ‘temporary citizens’ was reported by everyone as a significant consequence of the ECoC title. However, implies a controversial effect, if not supported by adequate funding, sustainable city planning and coordination among different levels of governance.

**Light and shadows emerge in the relation between CH and quality of life.** While all the sub-dimensions considered by the quality of life seem to be impacted by heritage, the intensity of the impact varies extensively among the sub-dimensions.

In all eight selected capitals, heritage has a *relevant relation in particular with education and skills*, including digitisation and digital skills, and with contentment and happiness. The relation with the other quality of life sub-dimensions seems to be weaker. However, this might be due not only to the absence of a linkage, but also to these sub-dimensions not always being specifically considered in the ECoC monitoring and evaluations. This makes their assessment more difficult for interviewees. Where such dimensions have been specifically considered, as for instance in the case of ECoC **Matera**, the studies conducted show a positive

<sup>125</sup> ‘ECoC has shown very clearly that the monuments and heritage, historical objects and so on, that they are the real value in this city, which directly translates into money, tourist traffic, are the actual attractors. And when we work with them and bet on them, there will be tangible benefits’ – WroCons01, Wrocław 5 June 2019 in Sanetra-Szeliga et al., 2020: 161.

contribution of ECoC to individual well-being. For Matera, ECoC contributed to increasing perception of physical and psychological well-being (71 % of the surveyed people reported a feeling of positive well-being compared to 58.3 % in the following year) and increase in life satisfaction (for 57.6 % of the surveyed people compared to 50.3 % of the benchmarking coming from ISTAT) (Sacco et al.).

A relation with knowledge and research seems to be present in half of the analysed ECoCs. For instance, in ECoC **Valletta** the research capabilities were considered one of the main legacies of ECoC.

The relation with the environment is ambivalent as pointed out previously. While heritage and culture in general can provide opportunities for learning about and acting for urban sustainability, it can also have negative effects (e.g. increased pollution, gentrification), which could downgrade citizens' quality of life.

#### Box 8.4. Linkages between heritage and education and skills and contentment

Interviews with ECoC representatives underline the role of heritage in providing learning opportunities for participants (both tourists and residents) and for staff in the cultural and heritage sector. In **Valletta** ECoC, according to interviewees, the main strength of the ECoC is rooted in the opportunities for knowledge, research and employment. However, as pointed out by Valletta 2018 (2018), a further professionalisation of the cultural and heritage sector is needed to ensure positive impacts. In **Wrocław**, an increase in competence and skills has been detected in particular for cultural managers and cultural organisations (Sanetra-Szeliga et al., 2020). An increase in the skills and competence of cultural and heritage professionals has also been detected for **Rīga**, with potential positive effects on the improvement in the quality of the cultural offer of the city. In **Umeå**, the valorisation of the Sámi heritage provided a learning opportunity for residents and other participants of the colonial past of the Swedish people and the heritage of the Sámi minority. For digital skills, the **Plodvív** case shows that higher attention should be paid to the overcoming of the digital divide in the cultural sector, including heritage. In **Matera**, 40 % of the surveyed people consider that ECoC provided them with the opportunity to challenge their knowledge and experience, while 60 % believe that it contributed to improving their skills (Sacco et al., 2020).

For contentment, in **Rīga** 40 % of the surveyed ECoC event organisers attest that the Rīga 2014 ECoC has improved the quality of life for the citizens of Rīga neighbourhoods, through grassroots projects, decentralisation of culture and focus on citizens' quality of life. In the **Valletta** case, more than half of the surveyed Valletta residents report that the ECoC made them feel enthusiastic, while lower percentages were registered by participants from areas outside Valletta (Valletta, 2018).

Source: HERIWELL Consortium based on data gathered by country experts

#### 8.3.2.2 Factors fostering the potential of cultural heritage in contributing to societal well-being

Regarding **factors that foster the potential of CH in achieving SWB**, the following emerged from ECoC interviewees, studies and workshop.

- Continuous funding and equality in accessing funding. Ensuring access to continuous public funding is particularly important for small grassroots organisations that do not have the necessary capacities to access private market funding or large public funding opportunities. As shown by the Wrocław case, particular funding tools can be created (e.g. micro-grants). Furthermore, interviews point out the need for long-term funding. ESIF investments can prove particularly useful to this end, and most of the ECoCs analysed have benefited from substantial ESIF resources, in particular from ERDF.
- Long-term, integrated and participatory strategies, as well as coordination between different levels of governance. ECoC representatives engaged in the HERIWELL ECoC workshop underlined that effectiveness of CH strategies, in terms of contribution to SWB, is influenced by their integration in the city urban planning policy. Integration in wider strategies addressing quality of life, urban and rural renewal, social inclusion, education, employment and business creation also increases effectiveness. The issue of designing projects coherent with the territorial needs and potentialities was also underlined as crucial by ECoC representatives. Furthermore, the coordination between various levels of government is fundamental for generating a positive impact of CH strategies. However, it remains a critical aspect. For example, the representatives of the ECoCs involved in the HERIWELL workshop reported mismatches between the central government and the local administrations about the typologies of heritage to invest in. This was especially important where there were minority and marginalised groups, when shaping the heritage policy agenda in this area.

Decentralisation of cultural initiatives (e.g. creation of cultural access points, creation of mobile cultural venues) and use of innovative cultural resources (e.g. industrial heritage), proved particularly useful for increasing accessibility to and participation in culture and heritage, in particular for marginalised groups.

Citizens' engagement not only as passive users, but also as co-creators of cultural activities, including heritage, proved highly relevant for enhancing interest and participation in culture and heritage. Engagement of citizens as equal partners also proved particularly relevant for engaging marginalised groups, and community-building.

## 9 Conclusions and policy recommendations

This chapter focuses on policy recommendations to enhance the contribution of cultural heritage to social well-being. The recommendations draw on the conclusions of the macro and micro analyses of HERIWELL and the reviewed international literature reviewed within the various HERIWELL activities.

### 9.1 Conclusions and policy indications in synthesis

#### 9.1.1 Key conclusions of the HERIWELL analyses

- A multimethod design has been adopted, based on empirical quantitative and qualitative analyses, including big data analysis at both macro and micro level. This allows the capture of the multifaceted and intertwined nature of the SWB outcomes of CH and to face data shortages due to limited harmonised data on CH.
- A relevant indicator of the relationship between CH and SWB is not only the endowment of cultural heritage assets, but also how accessible and accessed they are by people and whether true cultural engagement arises. While CH is important per se, its contribution to SWB depends on the existence of a valorisation strategy that purposely makes use of its individual and collective well-being potential.
- Cultural participation is not only an objective, but the main tool of all public policies aimed at enhancing cultural heritage and its potential positive effects on well-being.
- The place identity and sense of belonging related with participation is evident in the analysis of the HERIWELL case studies, the evaluation of ICH and the meta-analysis of the ECoC programme. A more 'integrated' view of the meaning and impacts of heritage objects, sites and traditional manifestations, as proposed by the European Parliament, deserves to become, more and more, a strategic public policy axis. Such a policy change is particularly important in rural and other areas at high risk of depopulation.
- In this context, dissonant or contested CH and related events can be negotiated. Issues can be settled on the basis of the inclusion of all stakeholders, as well as preparatory research, educational efforts and the willingness of policymakers to promote a mediation and partial restitution process. There is a greater awareness among youngsters of the possible negative effects of some forms of cultural heritage, together with a lower consideration of the value of CH. This shows that the value of heritage is not to be taken for granted.
- To activate involvement and therefore a 'qualitative' relationship with heritage and to facilitate a social impact, it is necessary to use participatory tools. For cultural participation to produce social outcomes, the following aspects should not be neglected: active participation of under-represented groups; active involvement of participants from the design phase of the policy agenda; ensuring equality between the leaders of participatory processes and engaged participants; and inclusion of the decisions taken during participatory processes in the policymaking process.
- Considering the difficulty to find common indicators to analyse the impact of cultural heritage on societal well-being, the use of big data, identifying the involvement in cultural heritage, can be useful for complementing the analysis of official data and for filling in data gaps.

#### 9.1.2 Synthesis of policy recommendations

The recommendations focus on three challenges stemming from the HERIWELL research:

- design of a common framework for the definition and measurement of cultural heritage and societal well-being;
- actions to maximise the potential of cultural heritage to contribute to societal well-being;

- strengthening the contribution of EU investments in cultural heritage to societal well-being.

## I. DEVELOPING A COMMON DEFINITION AND MEASUREMENT FRAMEWORK OF CULTURAL HERITAGE AND SOCIETAL WELL-BEING

1. Elaborate a common agreed framework for defining CH and SWB to improve their measurement and comparability across time and countries.
2. Define a common measurement system able to harmonise and weight the different forms of CH across countries, and to capture all dimensions of societal well-being as well as the impacts of heritage on SWB.
3. Improve data collection on CH and on its contribution to SWB.
4. Build the capacity of CH actors at all levels to gather data.

## II. FAVOURING HERITAGE POSITIVE IMPACTS ON QUALITY OF LIFE, SOCIETAL COHESION, MATERIAL CONDITIONS

5. Undertake actions to safeguard and valorise both TCH and ICH for SWB.
6. Mainstream the heritage dimension in all socio-economic and development policies including territorial planning, training, education and research, regional development, welfare, environmental and mobility policies and strategies.
7. Actively engage citizens in the design, delivery and evaluation of valorisation strategies through co-creation, co-production and co-evaluation processes.
8. Increase accessibility to CH from a physical, cognitive and economic perspective and of CH surroundings.
9. Harness the potential of digital tools to ensure accessibility of, and participation in, CH and enhance its SWB contribution.
10. Ensure multilevel and multisectoral governance of heritage policies.
11. Ensure continuous and adequate resources (political, legal, financial, human, etc.) for the design, delivery, monitoring and evaluation of CH.
12. Implement a continuous monitoring and ex ante, ongoing and ex post evaluation of CH strategies and initiatives, and their contribution to SWB.
13. Pay attention to specific social mechanisms in the design of CH strategies.
14. Increase inclusion and diversity in the heritage sector.
15. Change the approach in the valorisation of CH resources, enhancing social and environmental sustainability.
16. Build a participatory, open and inclusive CH narrative that considers the multifaceted nature of heritage.

## III. ENHANCING EU-FUNDED HERITAGE INVESTMENTS IN SOCIETAL WELL-BEING

17. Strengthen EU investments in CH.
18. Improve the data collection system on EU investments in CH.

## 9.2 Developing a common definition and measurement framework of cultural heritage and societal well-being

### 9.2.1 HERIWELL main conclusions

#### a. Defining and measuring cultural heritage

**Cultural heritage evolves continuously** due to its strong interdependence with socio-cultural values and norms that evolve over time, and within and across communities and societies. The HERIWELL project adopted a definition of cultural heritage relying on the one hand on the Faro Convention (2005), which promotes a broad understanding of cultural heritage. On the other hand, it relies on the work of the EU JPI

initiative and UNESCO (see Annex I) that further classifies CH in various categories: tangible, intangible and digital. Consultation with HERIWELL stakeholders and research activities on the ground indicate that **the distinction between the various forms of heritage is not always clear-cut, therefore they should be considered jointly in measuring and defining cultural heritage policies**. In addition, digital heritage came out as a typology, bridging tangible and intangible, and deserving a closer understanding.

**Measuring cultural heritage in all its forms is particularly difficult.** Regarding TCH, the diversity in the definitions adopted by international, national and local authorities in their registers of TCH and available indicators makes comparative analyses difficult. Most ESPON countries, taking as a reference the 'national heritage community', measure the size of their national heritage by counting the objects that constitute their CH by typology to create an inventory of the protected heritage. This measurement is based on the strong assumption that quite different objects (in relation to history, function, size, etc.) can be added as they are all considered as being part of the CH of a given community. These lists are however not comparable across countries (in some cases not even among themselves), being selected with different criteria. In addition, the notion of CH changes over time and may emerge as controversial or contested notions of heritage, which have to be dealt with. As regards ICH, there is the sometimes-controversial question of an appropriate definition covering all European regions, possibly to be developed in the context of the Faro Convention Action Plan.

The **lack of a commonly agreed framework on the definition of CH implies that data collected on CH differ from one country to another**. Furthermore, at EU level many of the data collected consider CH as part of the broader category of culture, making it difficult to disentangle heritage from other forms of culture.

To face these issues, HERIWELL adopted a **multimethod design considering CH** on the one hand **in a broad sense, encompassing all forms of heritage** (in the case studies, in the population survey and in the analysis of EU investments and programmes). On the other hand, it considers **specific forms of heritage through the use of proxies based on harmonised data at pan-European level**, in macro-level analyses.

#### **b. Defining and measuring societal well-being**

Similar to cultural heritage, **defining and measuring SWB is a challenging task. Not only is SWB both an individual and collective construct, but also different dimensions of well-being are intertwined**. The variety of frameworks for defining and measuring SWB reflects its different understanding across countries, but also across time. More recently, the Agenda 2030 sets a common basis for defining and measuring various dimensions encompassed in an overarching SWB concept. In addition, **cultural heritage is rarely considered as a well-being dimension** (only one framework includes CH; see Chapter 1).

The HERIWELL project developed a meaningful operational definition of SWB, starting from the literature. The **HERIWELL definition** of SWB reflects both its **individual and collective nature**, and includes the following three dimensions: **quality of life, societal cohesion and material conditions**.

The HERIWELL multimethod design considers all three dimensions of societal well-being in both macro- and micro-level analyses. However, **the absence of a commonly agreed framework defining the overarching concept of SWB triggers fragmentation and differences in data collection**. This implied an operationalisation of the societal well-being concept through proxies based on available harmonised data for a relevant number of ESPON countries (see Chapters 2 and 8).

### **9.2.2 Challenges and proposed courses of action**

#### **CHALLENGE 1.1**

*Lack of a commonly agreed framework on how to define and measure the dynamic and overarching concepts of cultural heritage and societal well-being*

#### **Proposed courses of action: HERIWELL recommendations**

- 1. Elaborate a common agreed framework for defining both cultural heritage and societal well-being that can improve their measurement and comparability across time and countries.**

🎯 *Target audience: EU and national policymakers, stakeholders and experts*

Based on the HERIWELL experience and findings, additional research and consultations with both cultural heritage and societal well-being policymakers, stakeholders (including citizens) and experts should be

enabled. This needs to further clarify the CH and SWB concepts, in particular from a measurement point of view, and to include cultural heritage among the well-being dimensions.

When it comes to CH, previous studies have pointed out the relevance of adopting a common definition in particular for statistical purposes, providing similar indications in this area (see ESPON, 2019). In the creation of such a definition, the following elements should be considered.

- *Ontologies*: definition and application of a common cataloguing system (ontology) to reorder the cultural heritage objects into main homogeneous classes comparable between countries. Currently, the glossaries are derived from the terms used to refer to legal categories that appear in national or regional heritage laws. Indicators derived from these statistics are usually constructed using information contained in official registers or collected via questionnaires completed by the heritage institutions that are listed. Although CH statistics are suitable for national statistical plans, a more general glossary should be defined, including national and regional classifications in common categories for all countries.
- *European Heritage Label*. The label, which started in 2013, is assigned to those sites that ‘celebrate and symbolise European ideals, values, history and integration’. Since 2013, the list of these sites has expanded. It could be further expanded and defined, considering the results of surveys conducted over time (e.g. Special Eurobarometer 466: Cultural Heritage) to identify the heritage belonging to the European ‘heritage community’.
- *Role of heritage communities*. Among the issues to be addressed in this process is also a clearer and practicable definition of the meaning and roles of ‘heritage communities’. So far, this has not been provided in either the UNESCO ICH Convention or the CoE Faro Convention.
- *Combined forms of heritage*. Combined forms of heritage should be specifically considered. Consolidated approaches, such as the Historic Urban Landscape proposed by UNESCO, and the new proposals of Baukultur, as defined in the Davos Declaration, could be fruitful frameworks to overcome traditional divides.
- *Controversial heritage*. Heritage is not free of controversial effects. Such effects altogether with mitigation measures should be considered in defining CH.

From a process point of view, the identification of CH has to be based on a *participatory process*, involving policymakers, experts in the field, stakeholders and citizens, etc.

A similar process should be put in place for the definition of SWB and especially for the inclusion of CH among the well-being dimensions.

The reaching of an agreement on a common framework for defining and measuring CH and SWB may be a long process. Therefore, *important European research projects should not take vaguely defined terms for granted in their terms of reference*.

## **2. Define a common measurement system able to harmonise and weight the different forms of CH across countries and to capture all dimensions of SWB as well as the impacts of heritage on well-being.**

🎯 *Target audience: EU and national policymakers, experts and stakeholders*

To compare CH across countries and to verify and quantify the existence of a causal relationship between CH and SWB, it is necessary to have detailed territorially homogeneous qualitative and quantitative data. These data need to be defined and collected in the same way in all territorial areas of reference (NUTS 1, 2 or 3). Several methods and techniques have been proposed to this end. For instance, the UK DCMS proposes to *value*, and not just count, the *heritage assets* using the methodologies developed in the social cost benefit analysis. Eurostat, in its experimental statistics, proposes not only to count the number of sites registered in each country in the World Heritage List, but to value them according to their popularity or cultural consumption. It will use Wikipedia page views as a weight.

The following paragraphs detail the HERIWELL proposals.

- *Revision of NACE-REV.2 and ISCO codes relating to CH*. NACE-Rev.2 (Nomenclature statistique des Activités économiques dans la Communauté Européenne) and ISCO codes (International Standard Classification of Occupations) are strongly correlated with each other. Therefore, the

change of one must correspond to a consistent change in the codes of the other. A revision of the codes is required to fully grasp the impacts on employment and businesses (material conditions) of the conservation and enhancement of heritage. Some proposals for change have been made so far, such as the proposal of DG for Education and Culture This reflects the structure used for the Blueprint call for the CH sector, in coherence with the recommendations of the Final Report of the European Statistical System Network on Culture (2012). Other organisations (e.g. the European Confederation of Conservator-Restorers' Organisations) consider that the 'NACE Codes reflect a somewhat anachronistic model of a sector dominated by public institutions when in fact the majority of today's practitioners work in the private sector' (Marçal et al., 2020: 23–31).

- *Expenditure on the preservation, protection and conservation of cultural heritage.* The category of expenditure – public and private – on CH proposed by UNESCO with Target 11.4 is an economic indicator. However, it could be taken as an expression of the size of the sector only if assuming that the amount of per capita expenditure is directly related to the size of the heritage. It could also be argued that the amount of per capita expenditure for CH is an indicator of the identity value that the 'heritage community' attributes to its heritage. The stronger the feeling of CH belonging to the community, the greater is its 'willingness to pay' for conservation and enhancement activities. Ultimately, this is a partial indicator (it only captures the economic dimension) and difficult to measure since the number of sources to be consulted and homogenised is, in many countries, very high.
- Concerning *controversial CH*, HERIWELL mapping shows that a majority of stakeholders is aware that CH can be controversial or needs to be reinterpreted from time to time. However, for a more in-depth picture of popular views of contested CH or even feelings of 'bad-being' caused by certain CH objects and practices, a more comprehensive survey should be carried out. Such a survey could be either in the context of a *Eurobarometer survey dealing with CH* or in a *special survey staged by professional bodies such as EUROPA NOSTRA*.
- *Harmonised approaches are also needed to identify heritage at risk*, as the UNESCO or national delegates of *EUROPA NOSTRA's Red Lists* appear to be understaffed to cover all the potential cases.
- *Integration of ad hoc modules in the Income and Living Conditions Survey (Eurostat EU-SILC).* At defined time intervals (the same as the ad hoc modules on quality of life), a specific module could be introduced to grasp the impacts of cultural heritage, both local and European, on the monitored indicators by EU-SILC. The questions introduced could be in line with the Special Eurobarometer 466: Cultural Heritage.
- *Use a multimethod design to capture the impact of all forms of heritage on all dimensions of well-being.* The type, range and spheres of cultural heritage-generated societal well-being impacts are multifaceted and require diverse evaluation methods and indicators. Thus, a measurement system of CH should include *both qualitative and quantitative aspects as well macro- and micro-level analyses to provide evidence to policymakers on heritage as a vector for societal well-being*.
- *Create platforms to aggregate and share evaluation methodologies and data* from different case studies and contexts. This can support the comparison of diverse experiences, knowledge sharing and capacity building, and the *development of aspirational evaluation models*.
- *Use a participatory process to define the measurement system.* The definition process should engage cultural heritage policymakers and national statistical offices, cultural heritage institutions at all levels, cultural heritage experts and stakeholders.

## CHALLENGE 1.2

*Fragmented and different data on cultural heritage and societal well-being across ESPON countries*

### Proposed courses of action: HERIWELL recommendations

#### 1. Improve data collection on cultural heritage and on its contribution to societal well-being

🔄 **Target audience: EU, national, regional/local policymakers and stakeholders**

Data collection on CH and its impacts on SWB can be improved in various ways.

- *Two strategies can produce the necessary data at EU, national and regional or local level.* The first is to build a long-term strategy based on publicly produced and managed CH open data systems. The second is to develop long-term partnerships between public authorities at EU and national level and big data providers. Ethical and managerial questions associated with the use of information collected can be addressed, and made available by private commercial providers. To this end, it is important that their use in the heritage field, as in other fields, is based on ‘smart’ and sustainable strategies.
- *Use of big data to complement current data on cultural heritage.* Big data may be used for analysis of the stock and popularity of sites or territories at the NUTS 2 and NUTS 3 levels, using different sources to answer different problems. *At the regional level, or at a more micro territorial level, TripAdvisor data can provide an estimate of both the popularity and the number of objects that make up the CH of that territory.* The use of a sentiment analysis applied to TripAdvisor allows for the analysis of the CH sites users’ preferences (utilities) and for the drawing of a ‘sentiment’ map of the cultural assets of the different territories. Understanding users’ characteristics, preferences and behaviour is also important for CH institutions (e.g. HERIWELL Mann museum case). The repeatability of the analysis over time would account for the changes that occurred in these preferences as a result of policies pursued or investments made, or the communication processes activated. *Wikipedia data can also be used to analyse the popularity and dynamics of the virtual cultural demand for a territory’s heritage,* specifying the sites to analyse. Considering the different languages through which Wikipedia can be queried, the levels and dynamics of the demand of the selected sites can also be analysed on the basis of the residence of the Wiki users. *An annual publication could summarise and communicate the relative popularity of sites or territories,* and the changes that have occurred, monitored respectively through Wikipedia or TripAdvisor.
- *Increase the availability of data on public and private CH funding.* To this end, detailed reports on expenditure in terms of ESA2010 categories (better classification for the creation of new assets – gross capital formation – or compensation of employees) are needed. As private donations represent one of the most important sources of funding for CH, a homogenous data collection system on private funding should be implemented. Some data may be derived by the Eurobarometer survey for the European Year of Cultural Heritage, which includes information on the donation rates of European Union countries in terms of money and time. Another possibility is to consider the financial dimension of tax allowances or incentives available for private CH objects.
- *Integrate data on heritage employment, outputs and outcomes currently collected.* More data and information are needed on employment in CH, as well as monitoring data on outputs and outcomes of EU, national and local programmes related to CH.
- *Explore the possibility to collect data on CH participation* such as: evidence of community involvement during the process of identifying and registering/ inventorying heritage elements (TCH and ICH); number of heritage properties with a management plan including a formalised framework for community participation; number of training programmes targeted at communities, groups and individuals by year; evidence of policies and measures supporting diversity and encouraging community programming for marginalised groups.

## 2. Build the capacity of cultural heritage actors at all levels to gather data

### 🌐 Target audience: EU, national, regional/local policymakers and stakeholders

The effectiveness of data collection processes depends not only on the existence of a homogenous data system, but also on its collection in a continuous and correct way. To this end, the capacity of both public and private actors engaged in data collection processes is of paramount importance at all levels of the system (i.e. from the local to the national and European one). Particular attention should be paid to building the data collection capacities of small CH organisations that often do not have the necessary resources for adequate data collection on CH and its impacts on SWB. To build data collection capacities, various tools can be used: i) design of specific toolkits and guidelines indicating data to be collected, collection methods and resources; specific training at all territorial levels; ii) peer learning between CH policymakers and stakeholders with advanced knowledge and capacity and less skilled or equipped heritage actors; iii) exchanges of experiences between CH actors; iv) twinning between large and small CH organisations; v) creation of digital platforms including information on data to be collected and how to collect it and examples of good practices, etc.

## 9.3 Favouring heritage positive impacts on quality of life, societal cohesion and material conditions

### 9.3.1 HERIWELL conclusions

HERIWELL analyses show that cultural **heritage impacts transversally on quality of life, societal cohesion and material conditions**. When it comes to quality of life, HERIWELL macro and micro analyses point to a strong link with education and skills. This includes digitisation, contentment and happiness, and life satisfaction, while the relation with knowledge and research and quality of the environment is less intense. The latter is probably also due to the limited consideration of these dimensions in existing measurement frameworks. It is significant that TCH, however measured, positively influences the subjective perception of well-being at all territorial levels. The pan-European aggregated analysis shows that TCH has a greater impact in countries and regions with better economic and social conditions of the population.

Concerning societal cohesion, the analyses underline a contribution of CH to all dimensions of societal cohesion. HERIWELL evidence has also emphasised the contribution of CH to reconciliation of community relationships following social conflicts.

CH also impacts on material conditions, contributing to making places more attractive for residents, tourists and businesses and to developing new businesses and new jobs.

HERIWELL analyses also show that **CH can have both positive and controversial effects** (e.g. pollution, gentrification, social conflicts), and that there is a **strong interdependence of societal well-being dimensions**. For instance, happiness and life satisfaction is strongly related to material conditions, but also to societal cohesion (i.e. place identity, sense of belonging and social inclusion). Life satisfaction is impacted also by education and skills, and place identity and sense of belonging are mutually related.

HERIWELL macro and micro analyses pinpoint that the **above-mentioned positive contribution to SWB is generated on condition that cultural heritage is accessible, valorised and that people engage actively with it**. It is particularly the engagement with heritage that proves decisive not only for the generation of SWB, but also for the safeguarding of CH, especially intangible CH. **Digitisation of CH** is also **decisive** not only for **increasing the accessibility to and participation** in CH, but also for **producing well-being** (e.g. education and skills, place identity, sense of belonging). **Contemporary creation of heritage** is likewise important for increasing accessibility of and engagement with heritage.

A number of additional drivers influence the contribution of CH to societal well-being. **Political support jointly with multilevel and multisectoral governance** are of paramount importance for:

- ensuring the continuity of heritage valorisation strategies over time, also through their institutionalisation;
- guaranteeing equal consideration of all forms of heritage;
- mainstreaming CH in sustainable local development policies and social and economic policies, human rights and social justice policies to strengthen its potentialities in contributing to societal well-being;
- designing, implementing and coordinating participatory valorisation strategies of CH.

Equally important is also **providing the necessary resources, both human and economic**, for supporting the planning, delivery and monitoring and evaluation of heritage valorisation strategies.

HERIWELL analyses on the ground reveal a series of **design mechanisms of valorisation strategies that enhance both participation in heritage and individual and collective well-being**: amusement, entertainment, pride, self-efficacy, certification, salience, performance feedback and financial incentives.

### 9.3.2 Challenges and proposed courses of action

#### CHALLENGE 2.1:

*How do we maximise the potential of cultural heritage to contribute to societal well-being?*

#### Proposed courses of action: HERIWELL recommendations

1. Undertake actions to safeguard both tangible and intangible cultural heritage

🌐 *Target audience: national, regional and local policymakers and stakeholders*

While preservation strategies are equally important for both TCH and ICH, HERIWELL case studies (e.g. ES, NO, CZ cases) and consultations show that they are particularly significant for ICH. Often, ICH traditions and practices are dependent on intergenerational transmission. Therefore, specific strategies should be adopted to foster it, such as:

- creation or recreation of collective memories of such traditions and practices (e.g. through contemporary creations, digitisation, intergenerational dialogues, celebrations);
- education and training measures (e.g. through the creation of academies of traditional practices, the provision of informal learning opportunities, the embedment of traditional practices in the school curricula);
- valorisation of traditions and practices within TCH settings (e.g. museums, libraries, archives);
- their accreditation or certification (e.g. inscription in special registers, trademarks, labels).

**2. Undertake actions to valorise cultural heritage for societal well-being purposes**

🌐 *Target audience: EU, national, regional and local policymakers and stakeholders*

HERIWELL analyses show that while CH is significant per se, its contribution to SWB depends on the capacity of policymakers and stakeholders to put in place policies that purposefully valorise its SWB potential. HERIWELL analyses show that valorisation strategies can take various forms (e.g. refurbishment of CH infrastructure and building new CH infrastructure, territorial planning driven by CH, education and training, contemporary creations, digitisation, cultural tourism, cultural heritage businesses development, social inclusion through heritage, therapeutic strategies). All valorisation strategies analysed by HERIWELL are equally important, as cultural heritage can produce effects transversally on all dimensions of well-being. The selection of one or another strategy depends on the societal well-being effects that policymakers and stakeholders would like to obtain. Thus, it is particular relevant that in the planning of CH strategies specific outcomes are identified and all forms of heritage are mobilised to achieve the respective outcomes.

**3. Mainstream the heritage dimension in all socio-economic and development policies including territorial planning, training, education and research, regional development, welfare, environmental and mobility policies and strategies**

🌐 *Target audience: EU, national, regional/local policymakers and stakeholders*

HERIWELL micro analyses show that *valorisation strategies of CH* should not be limited to heritage policies, but *should be mainstreamed in wider policy frameworks at all territorial levels to produce SWB effects*. This is also pointed out by the [Council of Europe European Heritage Strategy for the 21st Century](#). For instance, the inclusion of CH investments in the wider *urban regeneration and local development policies* can favour their effectiveness. The [New European Bauhaus](#) can represent a relevant opportunity to enhance a heritage-based territorial planning process. The *inclusion of cultural heritage in training, education and research* is also paramount as CH can contribute to the development of a number of social skills envisaged by the [European Commission LifeComp](#) objectives. Moreover, the mainstreaming of CH in vocational training can support the safeguarding of both TCH and ICH through the development of competences in traditional practices. The *inclusion of cultural heritage within environmental sustainability policies* is particularly important for developing more sustainable places. Various approaches can be adopted to enhance sustainability through CH:

- education to environmental sustainability through CH;
- CH institutions as promoters and implementers of environmental strategies at local level (e.g. adapting traditional handicraft practices to current environmental regulation, implementing energy efficiency strategies);
- promotion of ICH practices that can trigger sustainable behaviours.

Mainstreaming heritage policies into wider policy frameworks requires a collective effort across different policy fields to understand CH, and in more general culture and arts, as '*ways of enrichment, value, opportunities for professionalisation*' (ECoC interviewees). It also requires a greater capacity of actors from various policy fields (e.g. education, regional development, welfare, environment, mobility) to include heritage in broader societal well-being strategies.

The new ESIF programming period and the Recovery and Resilience Plans represent an opportunity in this respect. In planning and delivering CH interventions (especially in the framework of the new ESIF programming period and the Recovery and Resilience Plans), particular attention should be paid to the [European Quality Principles for EU-Funded Interventions with Potential Impact upon Cultural Heritage](#) defined by ICOMOS (2018). Furthermore, particular attention should be also paid to [CEN TC 346 Conservation of Cultural Heritage](#).

#### 4. Actively engage citizens in the design, delivery and evaluation of valorisation strategies through co-creation, co-production and co-evaluation processes

🌐 *Target audience: EU, national, regional and local policymakers and stakeholders*

Public policies and strategies in the heritage field often miss a crucial step of the cultural heritage value chain, namely access and participation. When planning or implementing CH policies, public authorities do not often understand or consider the importance of the process towards the creation of societal well-being. As underlined by the Council conclusions on the Work Plan for Culture 2019–2022 (2018/C 460/10), participatory governance of cultural heritage ‘is an innovative, people-centred and forward-looking approach, introducing a real change in how cultural heritage is managed and valued’. HERIWELL analyses confirm this position, showing that active participation of citizens in CH policies is particularly important for both the achievement of individual and collective well-being, and the safeguarding and further development of cultural heritage.

However, *not all participatory strategies are equally effective in producing well-being and care for heritage. Their effectiveness depends on the intensity of the participatory process:*

- higher engagement processes (e.g. co-creation, co-production, co-evaluation) and throughout the entire policy cycle (from agenda definition to the evaluation phase);
- *inclusion of the results of the participatory process in the final policy decision;*
- *their capacity to question unequal power relations in society, bringing forth the voices of marginalised groups in the design and delivery of the respective strategy.*

*Citizens’ active engagement in cultural heritage also depends on a number of other factors that should be considered in the design and delivery of participatory strategies. Accessibility of cultural heritage (see next paragraph) and recognition of the value of cultural heritage (i.e. valuation) by societies depends on CH certification processes (i.e. recognition of the value of heritage by reputable actors). Other factors are inclusion of cultural heritage on the UNESCO lists, national prizes awarded to cultural heritage actors, and social trends in society and family structures.*

The latter factor indicates that participation in CH is deeply rooted in social structures and family practices, which suggests that *people who are deprived from such contacts could be less motivated to participate in heritage activities*. From this perspective, the inclusion of CH within education strategies from an early age seems particularly relevant for ensuring equal access to CH. This applies equally to people from vulnerable groups. *The sense of ownership and identification with cultural heritage is also important for enhancing participation.* Feeling in charge of deciding their own heritage increases people’s responsibility over heritage as well as their identification with the initiatives they are engaged in. In addition, citizens’ active engagement is influenced by *context factors* (e.g. trust in institutions and civic cohesion level).

#### 5. Increase accessibility to cultural heritage from a physical, cognitive and economic perspective and cultural heritage surroundings

🌐 *Target audience: national, regional and local policymakers and stakeholders*

HERIWELL analyses have pointed out that *accessibility of cultural heritage is crucial for ensuring participation in CH and consequently favour societal well-being effects*. Accessibility should be ensured from a threefold perspective: physical, cognitive and economic.

Accessibility of cultural heritage can be reached in various ways, as also pointed out by the CoE European Cultural Heritage Strategy for the 21st century (2017). Among the accessibility strategies analysed in the HERIWELL case studies and in ECoC investments in cultural heritage, the following seem particularly relevant:

- *Target heritage opportunities and accessibility to marginalised population groups* (e.g. the poorly educated, people with disabilities, women, people from rural and remote areas, people from peripheral/neglected neighbourhoods, youth, institutionalised people).
- *Make heritage infrastructure* (in particular tangible and digital) *accessible to people with disabilities*.
- *Use digital tools to broaden the heritage audience* (see paragraph below).
- *Make heritage alive*. HERIWELL cases point out that contemporary creations using heritage (podcasts, events, etc.) as well as turning heritage spaces into meeting places (marathon through heritage sites, yoga in museums, debates in heritage settings, etc.) favour people's participation in heritage, including those not specifically interested in heritage.
- *Improve the aesthetics of cultural heritage buildings and potentiate reception and services facilities supporting participation in heritage*. The New European Bauhaus could represent a relevant opportunity in this direction.
- *Ensure economic accessibility of heritage* through the adoption of a pricing policy to eliminate or reduce cost barriers.
- *Decentralise cultural heritage opportunities* in areas close to inhabitants' living and working places or in non-traditional heritage places (e.g. retirement homes, hospitals).
- *Strengthen the dissemination of information on heritage and opportunities to engage with it*.
- *Pay attention to issues not directly related to heritage, but relevant for acceding to heritage*, such as the transport system and quality of spaces (e.g. cleanliness, safety, walkability) where heritage is located (in particular for tangible heritage). Also, ensure the adequacy of the digital infrastructure and digital skills of both heritage staff and citizens (in particular for digital heritage).

## 6. Harness the potential of digital tools to ensure accessibility of and participation in cultural heritage and enhance its societal well-being contribution

🌐 *Target audience: EU, national, regional and local policymakers and stakeholders*

As stated by the European Council Work Plan for Culture 2019–2022 'digital technologies are an asset for audience development and innovative methods of participation'. The HERIWELL analyses show the potential of digital tools for both ensuring accessibility to and participation in heritage, in particular for specific population groups (i.e. young people, migrants and women). Furthermore, it also contributes to favouring societal well-being (e.g. learning, sense of belonging, social inclusion). In the context of Covid-19 and the subsequent increase in the use of digital tools, a special mention should be made of the potential of digital CH in the educational area (see for instance [EHA Manifesto 2020](#)). However, the contribution of digital CH to societal well-being is conditioned by its inclusion within broader holistic strategies (e.g. as in HERIWELL Mann case study). This should be assessed and fine-tuned periodically, by strengthening the digital infrastructure and capacities in the heritage field and more generally in society. Furthermore, as revealed by the HERIWELL survey, not all citizens make use of digital technologies to experience heritage. Thus, digital strategies should be integrated into wider CH strategies combining in-person and virtual heritage valorisation activities.

### CHALLENGE 2.2

*How do we ensure the effectiveness of the above-mentioned actions?*

#### Proposed courses of action: HERIWELL recommendations

##### 1. Ensure multilevel and multisectoral governance of heritage policies

🌐 *Target audience: national, regional and local policymakers and stakeholders, including citizens and economic actors, from heritage and other fields relevant for well-being*

The effectiveness of the above-mentioned policy actions requires a strong coordination between the various territorial levels of CH actors (i.e. from the local to the European ones). It also needs it between actors from various policy fields as well as between public and private actors. This implies that a multilevel and a multisectoral governance strategy of heritage policies should be put in place. To this end, it is necessary to *create coordination mechanisms, tools and places where the different levels/sectors of government and stakeholders, including citizens, can interact* with each other. Furthermore, and in line with proposals of CH

organisations, a *particular focus should be dedicated to the empowerment of public administrations to enhance their capacity to advance meaningful participatory policies.*

Particular attention should also be paid to citizens' engagement as equal and long-term partners in the planning, delivery and monitoring and evaluation of CH policies. Furthermore, to ensure financial sustainability of CH strategies, attention should also be paid to the engagement of economic actors (e.g. companies, banks, foundations).

## 2. Build the capacities of stakeholders in the heritage and other societal well-being fields

- ✦ *Target audience: national, regional and local policymakers and stakeholders from heritage and other fields relevant for well-being*

The availability of skilled human resources is key for implementing innovative, quality and effective CH strategies. Specific capacity-building initiatives should be implemented by local, regional and national actors in charge of heritage policies, policymakers and stakeholders. Furthermore, regional or national and local public institutions and organisations should also pay attention to enhancing the skills of public and private actors in other areas of societal well-being (including heritage in broader well-being strategies). This can occur, for instance, through continuous exchanges and peer learning, mutual learning exercises or creation of mixed working groups.

## 3. Ensure continuous and adequate resources (political, legal, financial, human, etc.) for the design, delivery, monitoring and evaluation of cultural heritage

- ✦ *Target audience: EU, national, regional and local policymakers and stakeholders*

HERIWELL analyses and consultations underline that to ensure preservation and conservation, valorisation, accessibility and participation in cultural heritage, various types of resources are needed at all territorial levels (i.e. from local to EU levels).

In particular, mobilisation of political consensus towards the valorisation of CH and its inclusion into wider frameworks is crucial. Political consensus is also essential for ensuring the sustainability of cultural heritage strategies over time from both a content and financial point of view. Further attention should also be paid to increasing funding allocated to CH at EU, national, regional and local levels. HERIWELL analyses show that heritage public funding schemes play a role in the achievement of societal well-being outcomes. They act as an investment multiplier, attracting other investments in heritage. They often represent the only instrument for delivering complex projects that would not be implemented otherwise. They support small grassroots heritage organisations, crucial for the maintenance of CH at the local level. Often, such organisations are not able to attract investments from the private market or to accede to large EU and regional or national funding schemes. They allow free or low-cost access to heritage, in particular to disadvantaged categories, since high costs are one of the most relevant barriers for acceding to heritage, as confirmed by the HERIWELL population survey.

## 4. Implement a continuous monitoring and (ex ante, ongoing and ex post) evaluation of cultural heritage strategies/initiatives and their contribution to societal well-being

- ✦ *Target audience: EU, national, regional/local policymakers and stakeholders*

Monitoring and evaluation of cultural heritage strategies, in particular from a societal well-being perspective, are particularly relevant for pinpointing the contribution of cultural to societal well-being. The production of continuous and systemic evidence on the effects of cultural heritage on societal well-being triggers on the one hand a higher interest in further developing such strategies across territorial levels and types of actors, and on the other hand a higher funding of cultural heritage valorisation strategies. For instance, as can be seen in many examples of the '7 Most Endangered' campaign (Europa Nostra and partners), adequate information can also inspire heritage communities to lobby for endangered CH sites or even participate in safeguarding efforts. Moreover, feedback on performance of cultural heritage strategies is also essential for keeping actors engaged in such strategies, especially when their effects are visible over a long period (as in the case of the Irish Design Village Statements, Annex VII).

## 5. Pay attention to specific social mechanisms in the design of cultural heritage strategies

HERIWELL case studies reveal a set of **social mechanisms** triggered by the combination of design features with context features that have to be considered in order to **enhance the contribution of cultural heritage to societal well-being**. The following mechanisms stem from the analysis of cultural heritage strategies

implemented in HERIWELL case studies: *Emotions* (the strong feelings towards an object or issue that can foster changes in people's behaviours); *Pride* (feelings 'elicited by own or others' achievement and associated with self-esteem and positive self-image' (Lea, Webley, 1997)); *Amusement* (an emotion that has the power to catch our attention and memory and to influence (or be influenced) our moral assessment of others; *Entertainment* (makes people feel part of a specific 'fictional' situation at a point that their behaviours are shaped more by the fictional situation than by the reality they live in (Harris, 2001); *Self-efficacy* ('people's beliefs in their capacity to influence events that affect their lives' (Bandura, 1977: 191–215); *Repeated interactions* (repeated opportunities for meeting and dialogue between people, which fosters trust and cooperation, and societal cohesion); *Certification*, referring to the validation of an object or person by an external authority; *Saliency* (the capacity of certain things to stand out and attract people's attention; *Performance feedback*, referring to providing information on results achieved compared to the set expectations; *Financial incentives* (the provision of incentives that determine changes in behaviour).

### CHALLENGE 2.3

*How do we enhance the role of cultural heritage institutions as drivers for inclusivity?*

#### Proposed courses of action: HERIWELL recommendations

##### 1. Increase inclusion and diversity in the heritage sector

🌐 *Target audience: National and regional/local cultural heritage institutions*

Despite some improvements and interesting experiments aiming at more diversity in the heritage sector, especially in the museums field, there is still room for more efforts as regards e.g. staff composition and senior positions, educational programmes and opportunities for 'co-creation' as well as audience development. The issue of further mainstreaming gender equality within project design and implementation was also raised in the ECoC analysis, for example with respect to the need of including women performances and representation in culture and arts.

The following actions could be taken to promote cultural heritage institutions as drivers for inclusivity: efforts to address a perceived dominant male culture and power relations existing in society; ensuring a relevant representation of people with different backgrounds (e.g. ethnic minorities, migrants, people with disabilities) in the heritage sector and in heritage narratives and valorisation strategies; analysis of the social demand analysed to identify people's expectations, interests, likes and dislikes, as underlined also in the CoE European Cultural Heritage Strategy for the 21st century (2017).

### CHALLENGE 2.4

*How to mitigate the negative effects of cultural heritage on societal well-being?*

#### Proposed courses of action: HERIWELL recommendations

##### 1. Change the approach in the valorisation of cultural heritage resources enhancing social and environmental sustainability

🌐 *Target audience: national, regional/local policymakers and stakeholders*

CH can have negative effects on SWB. This may be found in the case of 'over-tourism' leading to degradation of tangible heritage, pollution, gentrification, increases in the price of houses in surrounding areas, or increases in the rent of spaces in the heritage field. It can also arise due to social conflicts over the use of the heritage of minorities or migrants, or contested heritage. HERIWELL local analyses show that many of these negative effects (for example, the increase of rental prices) especially affect marginalised groups. Therefore, attention should be paid to ensuring a social and environmentally sustainable valorisation of cultural heritage resources.

When it comes to social conflicts, as pointed out by Mouffe (2005), cultural activities including heritage should 'bring the voices of the "other" into an agonistic dialogue (...) where conflicting parties recognise the legitimacy of their opponents' (Hudson et al., 2017: 1541).

##### 2. Build a participatory, open and inclusive cultural heritage narrative that considers the multifaceted nature of heritage

🌐 *Target audience: national, regional and local policymakers, and stakeholders*

HERIWELL analyses (see Chapters 6, 7 and 8) point out that the valorisation of heritage resources for SWB purposes is not free of social conflicts. Therefore, particular attention should be paid to whose heritage is

narrated and how heritage is narrated. Narratives of cultural heritage should encompass both the ‘bright and dark’ sides of heritage and should be carefully designed through the engagement of the whole community.

## 9.4 Enhancing EU-funded heritage investments for social well-being

### 9.4.1 HERIWELL conclusions

Various types of EU programmes and funds (e.g. European Structural Investment Funds – ESIF; Horizon 2020-H2020; Creative Europe; Erasmus+; and European Neighbourhood Instrument – ENI) and international funds (e.g. EEA and Norway grants) have supported CH interventions in the programming period 2014–2020. HERIWELL analyses have focused on the ESIF, Creative Europe and the ECoC programmes. The analyses show the **relevance of EU investments in CH** and their **positive contribution to SWB**.

Concerning **ESIF investments**, according to the Cohesion Policy categorisation system, about 5.4 billion of ERDF funds were allocated to CH in the 2014–2020 programming period. The analysis of national data – including projects classified under codes not directly related to CH in the Cohesion Policy categorisation system – shows that 3 % of the total planned allocations ERDF resources were allocated to CH for 6595 ERDF projects. An additional EUR 1.14 billion has been invested by ERDF in CH projects under the ETC objective. The analysis of national datasets also shows the amount allocated by ESF to cultural heritage interventions: 0.15 % of the total planned ESF allocations were invested in 449 projects. When it comes to EARDF, the analysis of data available on the [ENDR online portal](#) reveals that EAFRD has financed projects in the field of cultural heritage in 19 countries, for a total amount of EUR 8.03 million.

Regarding the other considered programmes, **Creative Europe** contributed to funding CH in 224 projects, with an average amount of project of EUR 327 047.37. EU investments in **ECoC cities**, besides using ESIF funds, received the Melina Mercouri Prize amounting to EUR 1.5 million (2019 data).

### 9.4.2 Challenge and proposed courses of action

#### CHALLENGE 3.1

*How do we enhance the contribution of EU funding in cultural heritage to societal well-being?*

#### Proposed courses of action: HERIWELL recommendations

##### 1. Strengthen investments in cultural heritage

🔄 *Target audience: EU and national institutions, in the field of ESIF and cultural heritage*

Although EU investment in CH is particularly significant, *financing heritage can be further strengthened in all ESIF instruments and in particular, in the ESF*. Allocations in the ESF seem to be still limited, despite the role of heritage in education and social inclusion – two key objectives of ESF. Furthermore, considering the need to include the heritage dimension in other policies, particular attention should be paid to the heritage dimension in other funding schemes. This has already been undertaken in programme schemes such as the Erasmus+ programme, the Citizens, Equality, Rights and Values programme (strand 3 – Citizens' engagement and participation), H2020 and specific initiatives (e.g. European Year of Cultural Heritage). However, *a stronger consideration of the heritage dimension could be introduced in EU funding schemes dedicated to digitisation and digital skills* (e.g. Digital Europe Programme), *gender equality, integration of migrants, fighting social exclusion, health, etc.*

##### 2. Improve the data collection system on EU, in particular ESIF, investments in cultural heritage

🔄 *Target audience: EU institutions*

Available data on the ESIF provide some information on investments in cultural heritage. ESIF Open Data shows that ERDF allocates a significant amount of resources to investments related to CH; however, there are no data on ESF and EARDF CH-related allocations and on the projects implemented, with their outputs and outcomes. A mapping of national data sources on ESIF investments and projects carried out by the HERIWELL national experts shows many drawbacks in data collection at national and regional level. Therefore, it is necessary to: i) extend the categorisation system to projects and the other funds besides the ERDF; ii) provide data on number of projects and allocations at NUTS 2 level whenever possible, in particular

for national programmes; iii) provide data and indicators on outputs and outcomes of CH-related projects; iv) organise regional data on ESIF according to a common structure, to ensure comparability across European countries (e.g. the European categorisation of regions according to the NUTS system is a model that can be followed); include the English translation of CH projects' names and summaries in the ESIF Open Data Platform to allow keyword searches on specific themes.

Concerning the other funds, the link between CH and SWB is often implicit, making the identification of heritage impacts on well-being particularly complex. In addition, the EU funding lacks clear indications of the interventions dealing with CH and those tackling both CH and SWB, thus making it difficult to assess their linkages. Furthermore, particularly in the case of Creative Europe, EACEA data are not released for public use, while available data are not disaggregated by project partners, making it difficult to assess the distribution at national and sub-national level. In the case of the ECoC programme, evaluation reports are often based on a narrative structure, with information on quantitative indicators often lacking. Therefore, the following actions should be taken to improve the data collection process: i) codify cultural heritage interventions; ii) provide publicly available data disaggregated by type of investments and by project partner; iii) identify common societal well-being indicators and provide reporting on them.

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### Interviews

Representative of Valletta 2018 Foundation, interview conducted in August 2021

Representative of Valletta Cultural Agency, interview conducted in August 2021

Representative of the Municipality of Plodviv, interview conducted in July 2021

Representative of the University of Plovdiv, interview conducted in July 2021

Representative of the Regional History Museum of Plovdiv, interview conducted in July 2021

Representative of the Department of Political Science of the Umeå university, interview conducted in August 2021

Representative of the Municipality of Paphos, interview conducted in August 2021

Representative of the Foundation 'Rīga 2014', interview conducted in July 2021

Representative of the Cultural Administration of Rīga City Council, interview conducted in July 2021

Representative of Wrocław Culture Zone, former Wrocław 2016 agency, interview conducted in August 2021

### **Online workshops and deliberative event with cultural heritage policymakers and stakeholders**

Workshop targeted to HERIWELL country experts, November 2021

Deliberative event targeted to the HERIWELL EU Working Group, December 2020 and January 2021

Methodological workshop with experts in cultural heritage, September 2021

Workshop HERIWELL Population Survey 2021, October 2021

Workshop EU Regions Week cultural heritage, cohesion policies and well-being: a virtuous circle, October 2021

Workshop Contribution of cultural heritage investments in European capitals of culture to societal well-being: findings and debate, January 2022

Workshop Contribution of the Blueprint to societal well-being: findings of the HERIWELL Czech case study and debate, February 2022



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