



# REPORT ON STUDY VISIT MONTAGNANA - ITALY

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Subtitle

Version 1  
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## 1. Organisational information regarding the study visit

**Event:** SEMINAR AND STUDY VISIT AT MEDIEVAL FORTIFICATIONS OF MONTAGNANA

**Date:** 6<sup>th</sup> March 2018

**Place:** Montagnana (PD) Italy

**Venue:** “SALA AUSTRIACA” AT “SAN ZENO” CASTLE”

**Organized by the project partner** AICCRE VENETA FEDERATION

Participants from all the project partners attended the meeting/visit.



The agenda included both a knowledge exchange seminar and the fortified site’s study visit activity.



## 1<sup>st</sup> DAY - SEMINAR AND STUDY VISIT AT MIEVEAL FORTIFICATIONS OF MONTAGNANA (PD) - IT

*Organized by PP7 - AICCRE*

*6<sup>th</sup> March 2018*

**VENUE: "SALA AUSTRIACA" AT "SAN ZENO" CASTLE IN MONTAGNANA (PD) - IT**

### Agenda

**9.00 - 9.15: Participants registration**

**9.15: WELCOME SESSION**

*Loredana Borghesan - Major of Municipality of Montagnana*

*Bogusław Szmygin - Head of Department of Conservation of Built Heritage, University of Lublin (PL)*

*Giampolo Peccolo - AICCRE Veneto*

**9.30 - 11.00 - FIRST SESSION: knowledge exchange seminar**

**Venetian walled cities: history and opportunities**

*Loredana Borghesan - President of the walled cities of Veneto region association*

**Historical overview of Montagnana and its walls**

*Expert from the MURABILIA association*

**Conservation and re-use of Montagnana city's wall and castles**

*Massimo D'ambra - architect*

**The process of "sdemanializzazione" (transfer from state property to Municipalities) of the Rocca**

*Massimo D'ambra - architect*



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## Coffee BREAK

11.15-13.00 - SECOND SESSION: training on traditional and modern approach to management of ruins

Montagnana's castle and museum management

*Gian Antonio Lucca - representative of the "Center of studies on castles"*

Understanding the cultural heritage value of the medieval ruins

*Raffaella Lioce - expert of AICCRE*

Assessing the competitiveness of cultural heritage

*Camilla Ferri - expert of AICCRE*

Exploiting the potential of big data to assess CH attractiveness

*Dario Bertocchi - expert of AICCRE*

Round table: sharing the questionnaire to assess cultural heritage perception

*Coordinated by AICCRE's experts*

Steering Committee decisions

*Coordinated by LP*

13.00-14.00: Lunch

14.00-17.30: THIRD SESSION

Guided tour of Montagnana

Food Experience at the Prosciuttificio

Conclusions of the study visit in Montagnana



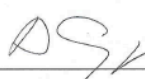
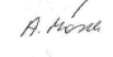
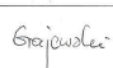
## Attendance list








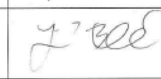
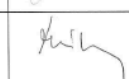
6<sup>th</sup> March 2018

SEMINAR AND STUDY VISIT AT MEDIEVAL FORTIFICATIONS OF MONTAGNANA (ITALY)

Attendance List - 1<sup>st</sup> Day


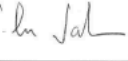

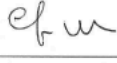
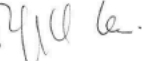

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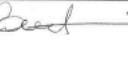



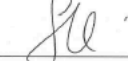

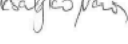
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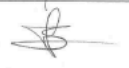
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## 2. History of the study visit site

**Contributor: Murabilia association**



The 2-kilometres-long walls surrounding the historical centre of Montagnana are the best preserved of all the town's defensive structures in the Veneto region. In ancient times, Montagnana's strategic position favoured settlements, as the town was located along the original road no. 10 Padana Inferiore at about 50 kilometres from important artistic cities like Padua, Verona, Vicenza, Mantua and Ferrara, and at 80 kilometres from Venice. The area was already inhabited in the late Neolithic Age and, in Roman times, Montagnana was the ideal location to control the entire region.

A military garrison was built to guard the bridge on the river Adige along the via Emilia Altinate (until 589 A.D., when the catastrophic flood known as the Rotta della Cucca destroyed it). In the 10th century, the frequent, devastating raids by the Hungarians prompted the construction of a fortification in Montagnana, probably around today's Castle of San Zeno. The small fortified village later became the feudal centre of the Marquesses Este (or Estensi) and participated in the struggle between the Papacy and the Empire. In the 12th century, the army of Ezzelino III da Romano, the imperial viceroy of Frederick II, fought against the Guelph League of the Marquesses Este, who supported the Pope. In 1242, after burning down the city, Ezzelino conquered it and acknowledging its strategic position, started its restoration by raising the Mastio (a medieval tower) which still bears his name. After a short period under the Empire, Montagnana first returned under the rule of the Estensi and,



in 1275, was included in the territory of the municipality of Padua. The portions of brick walls near the two fortified gates dates back to that epoch. In the 14th century, except for a short period (1317-1337) under the Della Scala family, Montagnana was part of the seignery of the Carrara family, lords of Padua. They built two new, imposing enclosures in brick and trachyte, with 24 sentry towers and fortified gate known as the Rocca degli Alberi. In 1405, weakened by the long-lasting wars against the Serenissima Republic of Venice, the city surrendered and gradually lost its military and strategic importance. However, its economic power grew thanks to the investments of Veneto aristocrats, who constructed sumptuous buildings and collected precious works of art.



### **THE WALLS**

In 1337, Ubertino da Carrara, the third seigneur of Padua, commissioned the construction of new, more imposing defensive walls, which ended when the fortification known as the Rocca degli Alberi was built in 1362 under Francesco the Elder. The enclosure commissioned by Ubertino is different from the first setoff walls built by the Municipality of Padua in that it is made of large blocks of Euganean trachyte alternating with layers of bricks. There are 24 polygonal towers which, being 17 metres high, offered safe sentry posts. In the Middle Ages, each tower had several wooden floors and roof, where the war machine was placed. Inside, an archway built along the Carrara enclosure served both as a wall walk for the sentries and,



below, contained built-in “cupboards” known as *cànipe*, in which the locals could store their farming tools. From the 15th century onwards, when the walls lost their defensive role, the towers were used as homes or storage rooms – functions that some of them preserve to this day. The surrounding moat (between 20 and 40 metres wide) was filled with water from Fiumicello, an artificial canal dug in 1277 to convey water from the river Frassine. The moat prevented both the projectiles of the war machines and the enemies on foot to reach the walls. The wall foundations were protected from water thanks to an embankment, the *motton*, which survived to nowadays.



### **CASTLE OF SAN ZENO, MASTIO OF EZZELINO AND CIVIC MUSEUM**

In the eastern part of Montagnana, the castle of San Zeno is the most ancient area of the city and dates back to the Estensi period, or perhaps even earlier. Except for a Venetian section and the corresponding Austrian raise, the castle was presumably built at the time of Ezzelino III da Romano (13th century). The main building has a rectangular plan with an impressive interior courtyard protected by sentry towers at each corner and by the Mastio of Ezzelino (40 m), which offers breath-taking views of the historical centre, the surrounding lush countryside and the Euganean Hills. Until the 19th century, to provide additional



protection, the castle was surrounded by a moat – even on the side facing the city. Under Venetian rule, the castle was known as the tana dei cànevi as it was used to store hemp, which was locally produced and employed on Venetian vessels. The castle also hosted the Venetian troops in winter.

As army barracks until World War II, the building of today’s Civic Museum was abandoned for years, restored between 1994 and 1996, and opened to the public. Today, its rooms host the Tourist Office, the local Centro di Studi sui Castelli (Castles Study Centre), the Municipal Library, the Municipal Historical Archive and Civic Museum. The Civic Museum “A. Giacomelli” has an archaeological division with findings dating from the late Neolithic Age to Roman times, and a medieval and modern division with frescoes, Veneto paintings and a large collection of pottery. The music section contains images, archive documents and the stage costumes of Giovanni Martinelli and Aureliano Pertile, two well-known tenors from Montagnana, both born in 1885.



**ROCCA DEGLI ALBERI**



Built by Francesco the Elder da Carrara between 1360 and 1362, this fortification reinforced the western walls facing the enemies from Verona. Originally, this section was weak both because it was made of brick and because it lacked sentry towers. The cleverly-designed military fortress was built in a very short time under the supervision of the architect Franceschin de' Schici. The Rocca stood on an island, surrounded by water both internally and externally, and its heart, the mastio (tower), could only be accessed through a complex series of drawbridges, portcullises and doors. The façades overlooking the town and the countryside are embellished by the coats of arms of Padua (the Crux Commissa), of Francesco the Elder (a crest with a winged, horned Moor), and of the Carrara family (a cart). Unfortunately, only the first one is still visible, because as soon as the Venetians conquered the town, they whittled the others away to erase all signs of previous dominations.

### **VILLA PISANI**

In the mid-16th century, the wealthy Venetian nobleman Francesco Pisani commissioned to the well-known architect Andrea Palladio the construction of a mansion to serve both as a holiday home and as a centre for the farming activities deriving from his real property in the surrounding countryside.

The villa was built next to the Castle of San Zeno, as if it intended to give visual emphasis of the power of the Serenissima in defeating the ancient seignury nobility.

The coat of arms of the Pisani family stands out on the main façade, which is divided by two orders of columns – one Ionian and one Doric. Overlooking elegant gardens, the back of the villa has an airy portico and overhanging loggia. An exquisite frieze with alternating triglyphs and metopes runs all around the four sides of the building. In the entrance hall, four statues by Alessandro Vittoria represent the four seasons.

### **DUOMO OF S. MARIA ASSUNTA**

The late Gothic façade of the Duomo (cathedral) is softened by a refined white marble portal traditionally attributed to Jacopo Sansovino.

As construction of the Duomo commenced in 1431 and ended in 1502, the result was architecturally different from the original design, and more in line with the new Renaissance style. The Cathedral contains historical and artistic masterpieces by well-known artists who contributed towards outlining the final aspect of the building. Two frescoes on the counter-façade represent two Biblical heroes: on the left is David, who has just defeated the giant Goliath, and on the right is Judith, who has just beheaded the Assyrian general Holofernes. Painted between the 15th and 16th centuries, these frescoes have been attributed to Giorgione, whose presence in the town is documented by his only sketch of the Castle of San Zeno (now in Rotterdam). The canvas depicting the Battle of Lepanto illustrates the famous victory of the Christian Holy League over the Ottomans (1571). Further left is the



small Cappella del Rosario (Rosary Chapel), whose symbolic frescoes date back to the late 15th century.

In the past its dome was a blue star-spangled sky with constellations: a “snapshot” of an eclipse in Leo, an extraordinary event that the people of Montagnana wanted to freeze in time and have immortalised in their Duomo. Proceeding along the nave, there are artworks like the altarpiece representing the Virgin and Child in a Throne Surrounded by Saints and St Catherine of Alexandria (right wall) enclosed by an elegant altar in Berica stone, both produced in the early 1500s by the Vicenza painter Giovanni Buonconsiglio, known as the Marescalco, who also painted the large fresco of The Assumption in the bowl-shaped vault of the apse.

In the middle of the apse is the high altar representing The Transfiguration (1555) by Paolo Veronese.

The apse also contains sixty carved stalls (1500s), which were decorated one century later with panels representing scenes taken from the Old and New Testaments.

### 3. Characteristics of the context

**Contributor: Loredana Borghesan, Major of the Municipality of Montagnana and President of the Association “Fortified Cities of the Veneto Region”**



The Veneto Region, the eight Italian Region per surface, has a territorial morphological variation: the level ground is prevailing (56,4%), similarly the mountain area (29,1%), while there is a minority of hills (14,5%).

The common feature of the Veneto territory is characterised by the presence of many rivers, including those from the Tagliamento outlet and Po delta river to the Adriatic Sea. These natural features also act as the cultural, economic and road network elements of the Region.

It is also peculiar for the great number of geographical areas characterised by microclimate and the presence of water springs. Surrounded by strategic transport nodes, our fortified cities are all around the territory, from the level ground, the piedmont area and the banks of the Garda Lake.

The fortified cities are the result of a long-term settlement responsible for the historic and artistic stratifications of years.



Here we recognise the artistic testimony of the works of art as well as the culture of the “best living place”, today represented by the production of the typical products and the presence of important events.

The Association “Fortified Cities of the Veneto Region” was born in January 1997 with the patronage of the Veneto Region and the initiative of the Council of the Veneto Region and Italia Nostra, an Italian NGO.

The Association was founded with the objective of promoting the initiatives related to knowledge, protection and conservation as well as valorisation of the cultural heritage of our fortified cities.

Today, around 38 Municipalities from 6 different regions are members of the Association.

All these municipalities represent the communities who identify themselves with the cultural heritage of the fortified cities. Our cities have developed a type of economy that is significantly linked to the history and the work of arts left by our ancestors.

The valorisation of our Middle-European historic and artistic heritage is interconnected with the fortifies cities of the Veneto Region.

Indeed, since X century the Emperors of the Holy Roman Empire and its military forces had crossed the Veneto territory of the Valpadana leading to Rome for the papal coronation and tried to restore their roles- at that time when the tensions with the Pope and the Empire were leaving autonomies to municipalities and lords.

These cities fortified structures built to control the main transport networks- became the point of reference with an increase of the population and of the productive activities.

For centuries, the urban and economic development of Veneto Region, mainly agricultural, handcraft and industrial, has significantly involved the fortified cities. Today, these urban centres are once again the centre of historical and economic interests.

Nowadays the Veneto Region leads the way in the agro-food productions that respect the quality system regulated by the European Union.

There are 36 geographical indications (GI), in particular 18 protected designation of origin (PDO) and 18 protected geographical indication (PGI). In the sector of the high-quality wine, there are 14 controlled and guaranteed designation of origin, 28 controlled designation of origin and 10 typical geographical indication. The traditional Venetian products counted 378 products in the National List of the traditional agro-food products of the year 2016.

It is remarkable to underline the great number of the certified and international recognised products.





These productions are related to the name of our fortified cities, referring to the cultural identity developed throughout the centuries with the cultivation of the land, the studies on field characteristics and climate and the collection of the handcraft experiences – factors that contributed to the creation of our industrial districts.

In this context, I will present some of our excellences starting from West to East:

- The fortified city of Soave, place of the prestigious wine Soave guarantee of origin (Verona province counts 14% of Italian guarantee of origin wines, 60% of Veneto guarantee of origin; with this comment I am giving credit to community of the city).
- The fortified city of Marostica, also known for the protected geographical indication of the Marostica cherry.
- Bassano del Grappa city known for the protected origin designation of the white asparagus.
- Treviso, the protected geographical indication of the red Treviso chicory.
- Castelfranco, for the protected geographical indication of the multi-coloured chicory.

Furthermore, who does not know the city of Conegliano for the famous wine of controlled and guaranteed designation of origin of Conegliano Valdobbiadene Prosecco

I would apologise for reducing the list of references which is longer and very interesting. Furthermore, considering the lunchtime it is not my intention to distract your attention.

I would like to conclude the topic with the introduction of a product that I consider the most relevant, both in term of the geographical location, the protected origin of designation Prosciutto Veneto Berico Euganeo, produced by 11 municipalities in the Provinces of Padova, Vicenza and Verona, and once it was known also as the “Crudo Dolce di Montagnana” (sweet dried ham from Montagnana).

Today our city is known and visited as an emblem of one of the best preserved fortified city in Europe, the artistic values of the churches and the palaces as well as the extraordinary our agri-food products.





## **THE FORTIFIED CITIES OF OUR TIME**

Hereafter some of the relevant maintenance interventions developed in the recent years are shortly described.

### ***CITTADELLA***

The defensive wall of Cittadella is one of the few cases of defensive system with a practicable patrol path on the rampant which has perfectly been preserved and maintained until nowadays. Thanks to the ambitious investment project- supported by the municipal administrations from 1994 to 2013- the defensive walls and the patrol path faced restoration, conservation and recovery processes. It costed 20 million euro, although, today it attracts around 70.000 tourists per year.

### ***PESCHIERA DEL GARDA (VR)***

The defensive system of the city was recognised as one of the “Venetian Defensive Work of Arts”.

In July 2017, at the 41st Session of the World Heritage Committee in Krakow, the defensive wall together with the defensive system of Bergamo e Palmanova were enlisted as World Heritage sites of UNESCO. Then, it places Italy the 53rd site in the list. In the context of transnational sites, Italy as well as Croatia and Montenegro applied for “the Venetian Defensive Work of Arts between XVI and XVII centuries: the State of Land, the State of West Sea”. The project represents a collection of an extraordinary and representative defensive system built by the Republic of Venice, in the period after the discovery of dust shot and erected throughout “the State of Land and the State of Sea”.

### ***MONTAGNANA***

For the last ten years, the investments in restorations and conservations of the historical centre have ensured the practicality of around 21 kilometres of road inside the fortified city, particularly in the area built with a dry technique of porphyry cobbles. The interventions also include the restoration of the floor and the lightening of the portico. Furthermore, the military fortress of Rocca degli Alberi – an impenetrable defence system based on its drawbridges and front gates- has recently changed its ownership, becoming property of the Municipality, and following the agreement with the Veneto Region, the Regional Museum of Middle-Age is going to be built.

In this context, in an interview at the Italian local newspaper, “il Mattino di Padova”, the Italian Minister of Culture, Mr. Franceschini, highlighted the increasing touristic trend in the last year, especially of state museums. Since the past three years, he noticed a raise from 38 million to 44 million tourists as well as growing visits to less famous museums.



According to the Minister, “Visitors demands for a complete touristic experience that goes beyond the availability of an art gallery”.

This comment of the Minister hints the possibility of a growing position for our artistic cities, especially for the small towns and villages, where people can find in these environments the uncontaminated and well preserved cultural and artistic heritage.

With this regard, the majors of these cities are entitled with great responsibilities.

Today, it is not particularly easy to manage and direct the administration of our cities, especially within an Italian region that has played a leading role in the industry sector since the 1970s.

The industrial sector of the region was based mainly on the concept that combined the personal environment (the house) with the professional location (the atelier, depot or studio). The result of this trend registered serious consequences, more precisely it ruined the urbanism and the soil of the territory as well as defaced villages and environments with the development of invasive and outdated road network.

Nevertheless, only at the first sight the situation seems to be critical.

Indeed, I think that the reason for the existence and the dynamism of our cities can to be found in the economic development of our Region, especially in relation to the last 40 years. It has maintained different points of strength, more precisely:

- The complete absence of the depopulation due to job opportunities. If you have a look at the demographic indexes of a great number of municipalities in Tuscany and Umbria Regions, you can notice a negative demographic path. Even though the small cities and villages host the most artistic and historical attractions, if they face a process of depopulation, their decline would be inevitable.
- The fortified cities are still active and dynamic centres, where their historic features combine with the administrative, educational, health, social and political services.

I am speaking in behalf of the majors and I can say that we have the duties to preserve as well as revitalise the city, ensuring that among our squares, under our porticos, within our churches, the community is able to feel the revitalisation.

With this in mind, we are able to face the future challenges, and therefore, our fortified cities would not lose their identity. Considering this, we believe that also our visitors can have great experiences and appreciate our urban centres. Indeed, today tourists are interested in two characteristics: enjoying experiences and emotions.

## 4 Conservation and Management issues: Ruins, Museum, Cities Wall

*Contributor: Gian Antonio Lucca, Centro Studi sui Castelli (Castles Study Centre)*



The museum can be interpreted in a strict and broad sense.

In a strict sense, “museum” commonly refers to a building that appears to be “more or less” high, sumptuous or modern, and where objects and historical artistic artefacts are well organised, preserved as well as open to public.

In a broad sense, the museum is the city itself with its own territory.

By taking into account a simple, but not evident consideration: the museum is the expression, the result and the heritage of a territory, history and community. [2] The term “territory” refers to the geographical territory as well as man-made; “history” means to the political and military events leading the public and private life, the production and the economy; and “community” stands for common or extraordinary people, who contributed with peculiarity to a specific territory throughout decades and centuries, in particular, those who added self-consciousness to the city and the territory.

Then, there is a simple but not evident deduction. If the museum is the result of its own territory, history and community, it cannot be created without a purpose, neither as a whim



to satisfy, nor appear out of scratch. For instance, it does not make sense to a small or medium municipality to purchase a museum that is unrelated to the environment, even though it hosts peculiar and interesting artefacts. If this is the case, it would have been a mistake because of incapacity of the municipality to understand its own territory, cultural heritage and history. On the other way around, it would have been disappointing the lack of interest in the creation of a museum.

In other words, there is the lack of the ability to understand and appreciate the characteristics of the territory. Thus, there is the risk to lose, maybe for an indefinite period, its historic and territorial peculiarities that, instead, they should have been transmitted.

Leaving the theory aside for a moment, I will illustrate the real cases.

With this regard, I am going to speak about the case I know the most, the one related to city of Montagnana.

Montagnana can be defined as a small town (today it counts 9.500 inhabitants, back in time, when the town was the point of reference to the south border with the cities of Verona and Padova, it counted 12.500 residents). As it was mentioned earlier by the Touristic Office and the experts of the Association Murabilia, the town was an important centre during the ancient Venetian communities, the Roman Empire, the Middle Age, and mostly when the north part of Italy belonged to the Serenissima Republic of Venice.

That time has not yet disappeared. Indeed, today we still lean on the past. It does not vanish because it is reflected on the urban pattern, the buildings, the dusty archives, as well as the past time that can still contribute to the high-quality tourism.

In this context, I will illustrate two cases: the creation of the museum of the San Zeno Castle and the re-use, after a secular state of neglect, of the fortress “Rocca degli Alberi”.



### **1st Case: Civic Museum of “Antonio Giacomelli”**

*Ownership: Municipality of Montagnana*

*Management: Touristic Office and Association Murabilia*

The Museum that we see today was restored and opened in 1995, after the restoration of the San Zeno Castle. At the end of the XIX century, archaeological evidences related to the urbanisation of the area belonging to the prehistoric, proto-Venetian and roman time period were found in the surrounding of Montagnana. They were significantly disposed at the National Museum of Este, created with the purpose to collect the great number of artefacts discovered in Este, one of the major centre of the ancient Venetian civilisation (VIII B.C.) and the Roman colonisation.

Since the second half of the XIX century, the past time of the city was the object of research and studies: the main scholars were Giacinto FORATTI in 1860, Giuseppe GIACOMELI in the first half of the 1900, and particularly, his son Antonio GIACOMELLI, who was nominated honorary inspector of the Antiquity and Fine Arts and named the current Civic Museum.

In the 70s the interests and the research on the local territory flourished, especially due to the important collaborations established earlier with the new School of French history (la



Nouvelle Histoire related to the review Le Annales). This phenomenon had an impact on a great number of Italian towns and was not exclusive to Montagnana. Several young people discovered and consequently informed the authority of antiquities and studied the artefacts that emerged in the fields, which until that time they did not receive enough consideration. Indeed, it was not the artefact per se to be the object of the interest- probably the most precious had already been taken by private collectors- but the reconstruction of the human settlement (the man-made environment), the building of tools, the nourishment, the past habits etc. All these increased the productions of studies and publications.

In those years (when I found the first evidences in 1973) there was a necessity to build a Civic Museum also in Montagnana, with the idea of preserving artistic ceramic artefacts dated back to XVI century, found and collected by Antonio Giacomelli nearby the walls of Montagnana (precisely, between the Rocca degli Alberi and the public boarding school San Benedetto). Then, in 1975 a first centre of museum, the Museum of Ceramics, was built in one side of the Municipal Palace, disposed of the financial offices.

By that time a great number of important discoveries were recorded.



Between 1973 and 1974, in the nearby of the south of the centre, a burial area belonging to a rich ancient Roman family, Gens Vassidia, was discovered. The splendour of the tombstones and the grave goods represented the richness and power of the family, as well as the importance of the territory during the Roman Empire. [9] It would have been a mistake transferring the artefacts to Este.

Thus, with the consideration of the Municipality and local supporters, the Ministry of the Cultural Heritage allowed their conservation to be preserved in Montagnana, unless a specific place for their conservation would have been created.

The first suggestion included the Castle of San Zeno. [10] By that time the Castle was not at all usable: for several years, after the restoration, the Ezzelino tower was practicable, and the Venetian façade (built by Venetian artists in XVIII century). However, in the 1960s the most ancient side of the Castle was in a terrible condition.

With regard to the disposition of the artefacts in the Museum, the most detailed objects (Neolithic arrows, ceramics of the Bronze Age, grave goods of the Roman Empire) were placed in a room at the Venetian side of the Castle, at the ground floor (today you can find the Tourism Office). The enormous gravestones of Gens Vassidia and other artefacts were arranged at Chiesa San Giovanni dei Battuti, an abandoned Church (built for the ancient laic benevolent confraternity of San Giovanni) which later became the main location of the Roman Gravestones.



In 1995, when the restoration of the San Zeno Castle was completed, then the experts were able to arrange the organisation of the four rooms (ground floor: the Roman gravestones and prehistoric room, the Roman room, and the ceramic room). An additional room was





integrated to provide testimony of our history. [18] Indeed, in Montagnana two important tenors were born in XIX century, Aureliano Pertile (1885- 1952, Milan) and Giovanni Martinelli (1885-1962, New York) grew up in a dynamic musical environment. They performed in the greatest international opera theatres, especially in North and South America. With the substantial contribution from private donations, a room with relics and costumes belonging to the artists was created.

Nevertheless, it would be a mistake thinking that only territories with ancient artefacts are the places for a museum. Each territory has its own peculiarity, whether that will be to preserve, tell or display.



For instance, in a field in the surrounding of Montagnana, there is the ancient monastery of San Salvatore (San Salvaro). The key aspect is the peasant environment, which was the subject of two relevant books produced by a contemporary local Italian writer, Ferdinando Camon. Then, with the contribution of the Municipality of Urbana and the local supporters, the monastery was restored, and a museum of the peasant community was allocated in the ancient granary. The Museum shows the poverty and hardships through the tools, yet necessary to bring the memory alive and share them with the young generations.

It is important to underline the fact that Museum management is economically sustained by visitors, but it preserves its meaning and receives contributions through seminars,

studies, books and publications, that continue to provide a value to the territory, history and community.



## **2nd Case: ROCCA DEGLI ALBERI (Fortress) [31]**

*Ownership: State property, in the process to be transferred to the Municipality of Montagnana*

The second case does not illustrate the creation of a museum in the strict sense, but the restoration and the valorisation of an important piece of the medieval fortress of Montagnana, the Rocca degli Alberi, as it was abandoned from 1960s since recent times.

Built between 1355 and 1360 by the request of the Lord Francesco I da Carrara, the Fortress aimed at the completing the walls of the Municipality of Padova, a project started in the second half of the XIII century, when his power increased after the death of the tyrant Ezzelino III da Romano.



The lack of its military function and the new advancements in technologies – making medieval walls and firearms obsolete tools for defence - were the main reasons for the abandonment of the Rocca, and then designated as a store, a craft lab and a dog shelter.

In the second half of the XIX century, the battlements were facing disastrous conditions, as you can notice from the work of Pietro Chevalier.

With the advent of the Austrian Government (1814) and the unification of the Kingdom of Italy (1866), the Rocca, together with the city wall, remained under State property as a military asset.

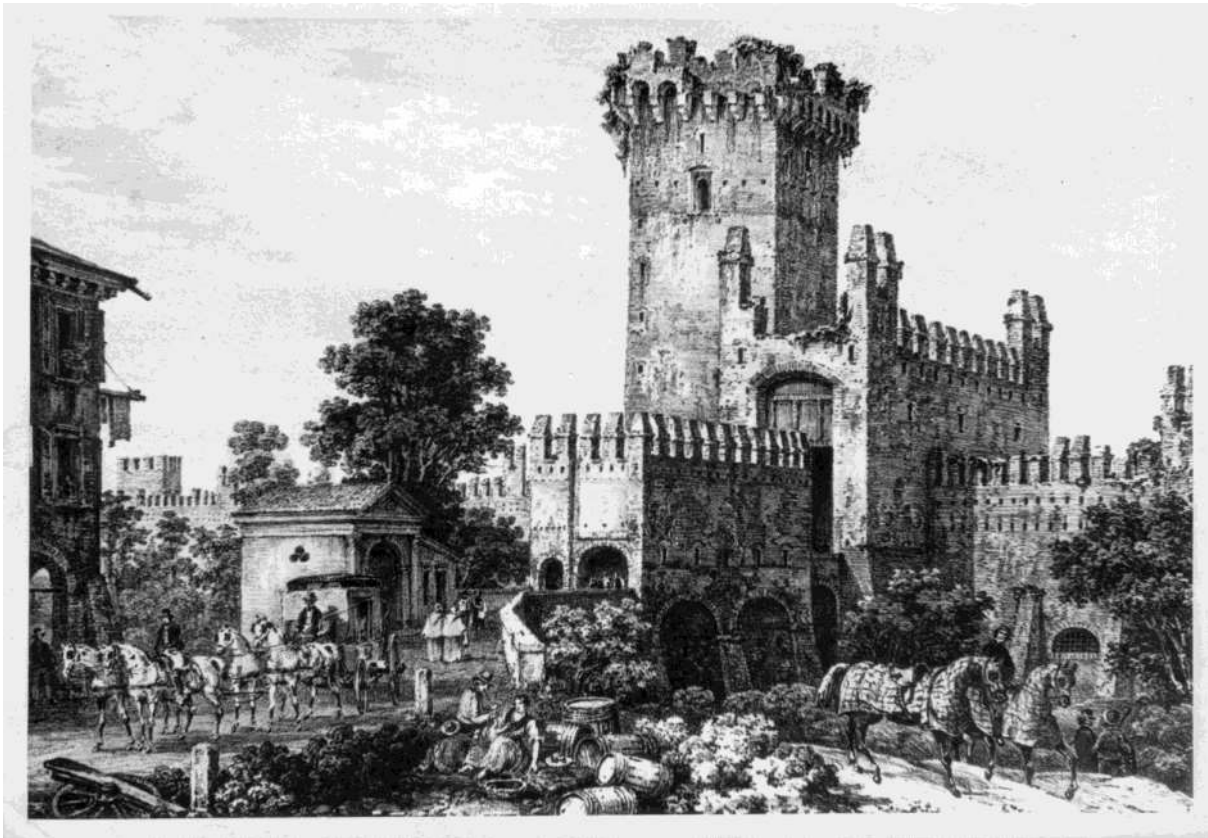
In a great number of Venetian cities, the castles and the ancient medieval walls between the end of the XIX and the beginning of the XX century were demolished, even considered a form of shame from the past period and an obstacle to the development of the modern urbanism. Similarly, in Montagnana some authorities were in favour of a partial demolition of the walls. Fortunately, they were opposed by some people, those who preserved the so called “history of the homeland”. Thus, the ancient fortifications were not destroyed, although, leaving their state without a restoration would have damaged the structure in the short term.

By that time it was observed a raise of awareness related to the cultural heritage of Montagnana.

A significant contribution has been provided by research, studies and publications performed in the second half of the XIX century and the first decade of the XX century. Some scholars provided the basis together with the Municipality (in 1950) - led by the Parliament deputy, Honorable Gigliola.

Valandro- for the realisation of the centre dedicated to the castles’ study and the conservation in Montagnana, known as the Castles Study Centre. Although, to have a better understanding of castles according to the founders (Mr Stanislao Carazzolo and Antinio Giacomelli) it was necessary to go beyond the focus on the city, to study precisely the phenomenon of “medieval castles” in Italy and Europe.

The increasing awareness, the contact with the international dimensions and the support of the scholars (such as Stanislao Carazzolo, Antonio Giacomelli, Antonio Gambarin and Francesco Gambarin, the mayor of the city in 1980s) were the elements that contributed to the new idea of the Rocca. In particular, one side of the fortress was reserved to the youth hostel in collaboration with the Italian Association of the Youth Hostel (AIG), a member of the International Youth Hostel Federation.



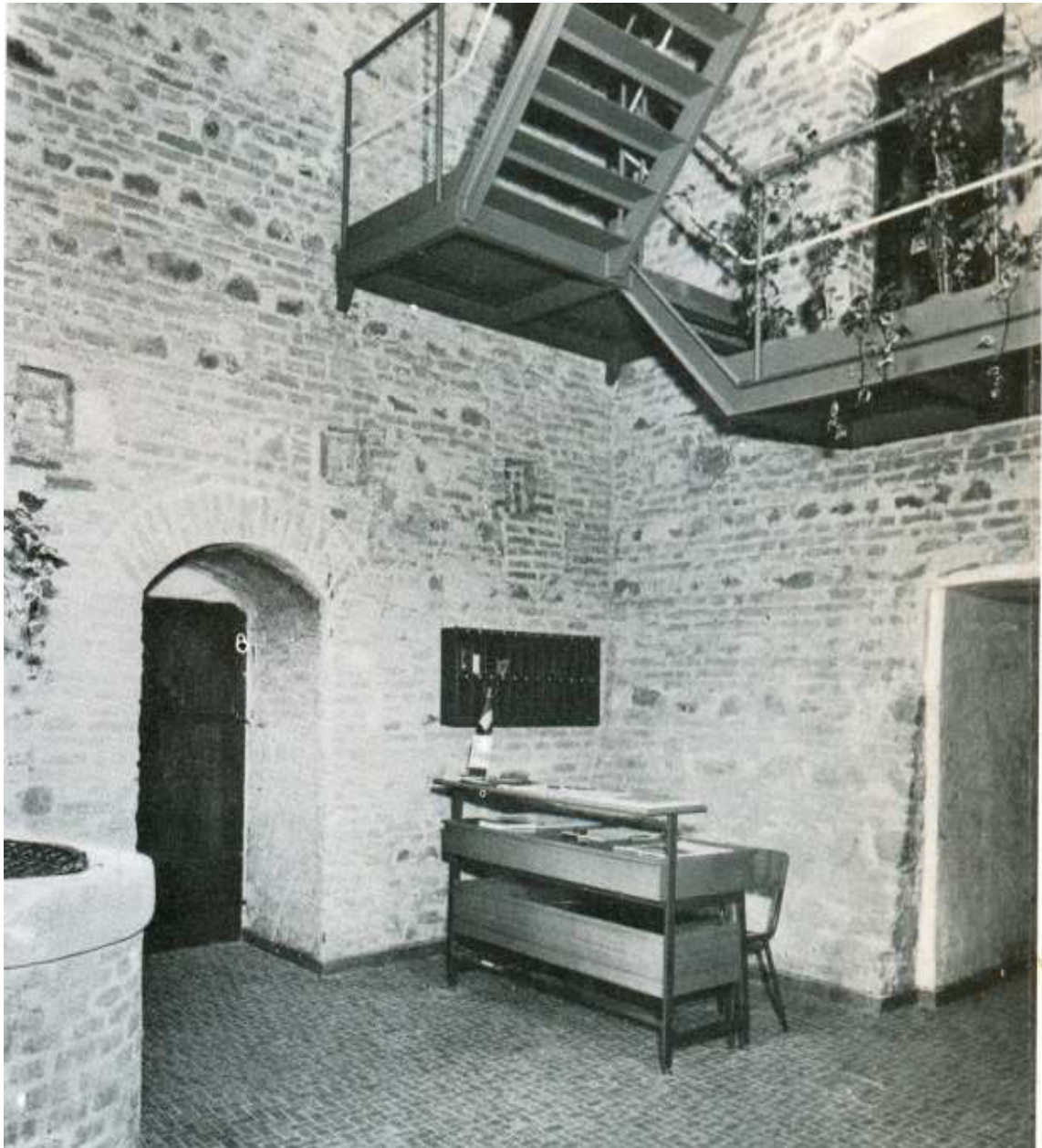
The project was not realised in one day.

According to sources from the Castles Study Centre, the first project of maintenance works for the battlements of the fortified tower dated back to 1957 (during the position of the mayor Gigliola Valandro), meanwhile, the idea of the youth hostel was developed in the next years. After the decisions related to the use of the Castle, between 1960 and 1963 the maintenance works on the mezzanines and their installations and services were completed. In order to reduce at best the interventions on the original walls, the two towers surrounding the Rocca were restored and supported with steel mezzanines and stairs. Then, the restauration allowed to create 40 beds and entrance hall.

The costs for the restorations were provided by the Municipality of Montagnana with a remarkable contribution from the Italian government by that time (the amount was supposed to be around 100 million lire). [39] The hostel was inaugurated in 1964 and continued its activity for forty years.

However, during the early years of the 2000, the structure was closed due to the inability to comply with safety law requirements.

After the closing of this activity, with the transfer of the ownership from the State to the Municipality, today there is still the intention to attribute to the Rocca a new functional use and employment of the structure, in line with its historic value.



## 5 Scenarios for contemporary use of the Cities Wall and the ROCCA

*Contributor: Massimiliano D'ambra*



Considering that fortifications are generally state property, the municipal authority of the city of Montagnana has promoted the Valorisation Programme, a form of regulation that enables part of the property transfer to be acquired by a municipality. The Programme aims at the systematic valorisation of the fortified structures of the city and their appropriate use in compliance with the cultural and touristic purposes to ensure the social, cultural and economic returns for the local community and the tourism businesses.

The purpose of the Programme is to extend the operating area of culture reaching the interconnected business opportunities of other sectors. Then, the adopted touristic-cultural strategy takes into account the related integrated destinations, both in terms of tourism and culture with a focus on the valorisation of the historical city centre and the delights (food and wine delights are at the top of the list) to ensure the creation of the complete valorisation of the territorial context.

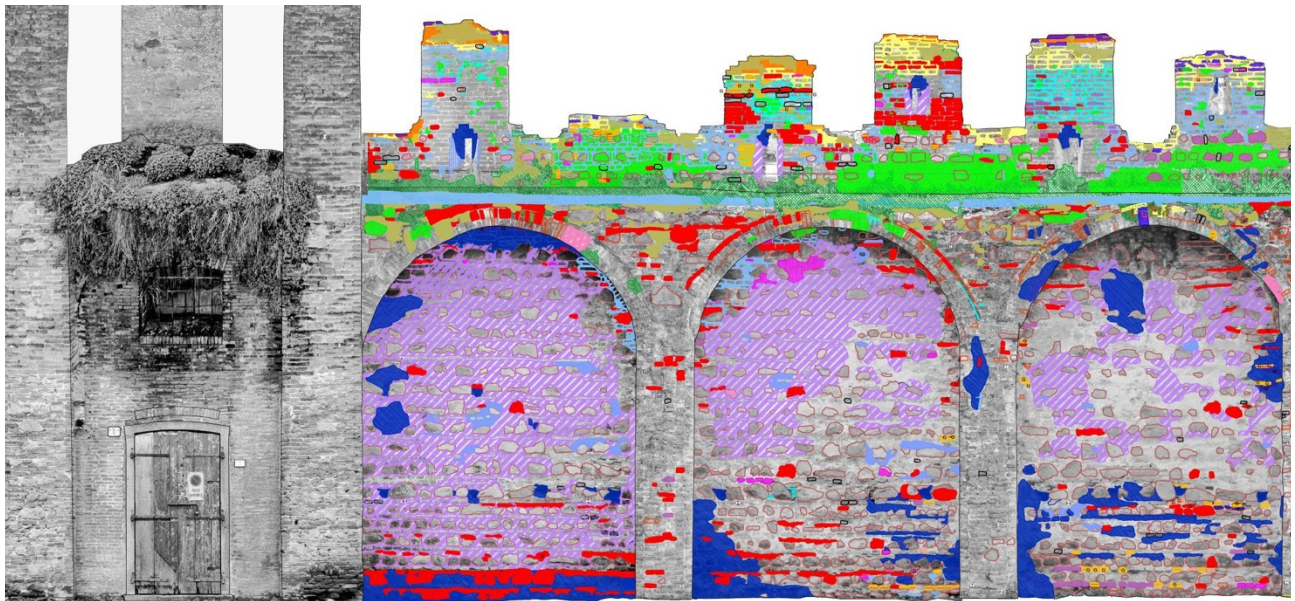


The points of strengths and weaknesses of Montagnana were significantly evaluated to ensure the adequate valorisation of its fortifications and its historical centre as well as understand the community, social and economic opportunities related to these activities.

The valorisation of the ancient structure will consist of three thematic areas:

- cultural, touristic and event development;
- economic and employment development;
- development of the territorial excellences.





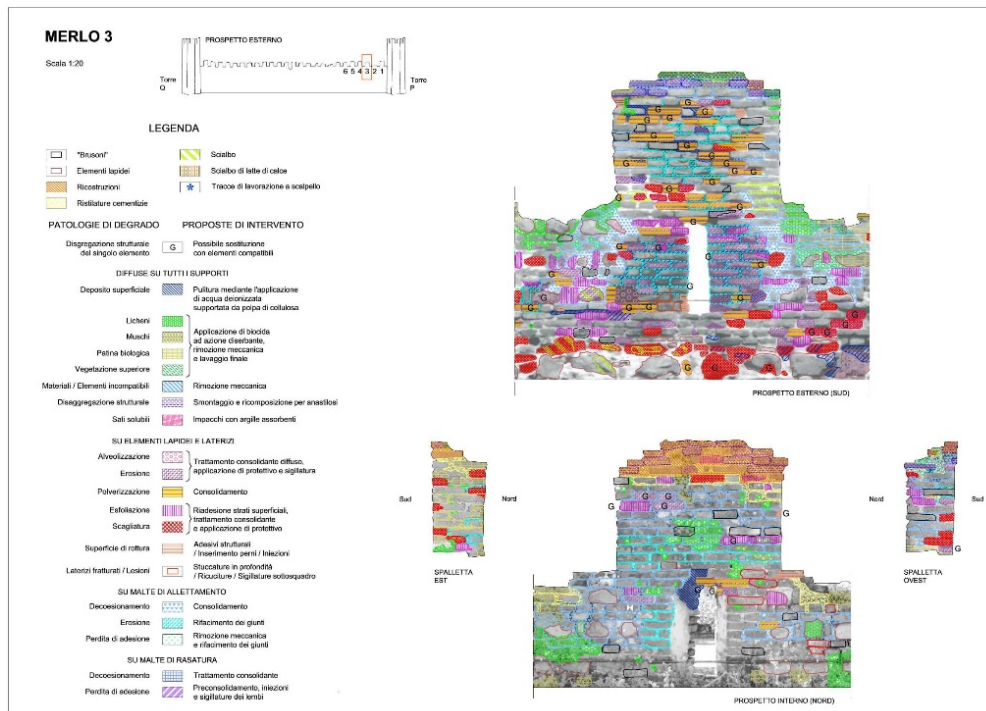
These thematic areas represent the basis of the Valorisation Programme for the fortified system that identifies the city's characteristics.

<b>STRENGTHNESS</b>	<b>WEAKNESS</b>
<p>Compliance and importance of the historical, artistic and cultural heritage;  Existence of historical centre significantly identifiable, rich in culture and customs;  Themes related to the cultural and monumental heritage;  Proximity to significant touristic destinations;  Significant position in a region hosting many provinces;  Great attractiveness in food and wine tourism;  Increasing demand of active and diversified tourism;  Possibility to differentiate touristic services;  Strong identity of the historical traditions of the city;  Tourism seasons beyond traditional peak periods;  Proximity to Regional Park of Colli Euganei;</p>	<p>Montagnana provides a limited number of accommodations and the touristic offer is not sufficiently diversified;  Lack of touristic infrastructures and related sectors;  Limited experience in promotion and territorial marketing;  Limited valorisation of private historical buildings;  In the agricultural production field, no infrastructures provide didactic and touristic routes;  Lack of ad-hoc infrastructures and services that address large tourism;  Limited territorial coordination actions constrain the system of the excellences within the territory;  Lack of impacts in innovative sector;  Lack of recall services and infrastructures;  Negative economic condition constrains the investment possibilities.</p>





<p>Capacity and willingness towards innovation;          Good level of conservation of historical and urban contexts;          Possibility of development for sustainable and cultural tourism;          Creation of active community organising for the valorisation of heritage;          Existence of important food supply chain excellence;          Competitiveness of productive system;</p>	
<p><b>OPPORTUNITIES</b></p>	<p><b>THREATMENTS</b></p>
<p>Significant increase and development of touristic sector for high potential in environmental and artistic-historic heritage;          Possibility of development for the sector;          Limited touristic intensity of the area provides large contexts for the development of highly sustainable tourism;          High socio-economic and cultural returns related to the development of existing opportunities;          Encourage the active participation of the population to the recovery activities creating possibilities of social involvement and sharing;          Environmental integrity;          Sensibility of public opinion in the environmental and cultural heritage and possibility of sustainable development of the existing resources;          Increase of interest in tourism, cultural tourism and food and wine tourism;          Propensity of the collaboration between public and private subjects for the promotion and valorisation of the environmental and cultural heritage.</p>	<p>Loss of competitiveness in the touristic sector related to the inadequate offer;          Insufficient actions for existing potential economic opportunities;          Inadequate relations between the touristic promotional activities and the promotional activities related to territorial resources;          Management difficulties related to the lack of physical and non-physical infrastructures;          Insufficient impact of the touristic promotional activities;          Problems related to access to the territory due to the inadequate transport system;          Limited network of diverse touristic offers;          Limited efficiency of coordination activities between administrations and productive system.</p>



The project aims at creating a consistent increase of social profit within the territory, involving the wellness of local community, through:

- the economic improvement of the increased tourism and competitiveness from local economic structure (i.e. employment, consumption and investment),



- the cultural improvement and non-physical aspects related to the social wellbeing.

A significant part of the economic support of the programme is provided by public-private partnership. The contributions are activated by different mechanisms to ensure the management of some functions compatible with the infrastructures.

The valorisation programme optimises the existing opportunities, coordinates and addresses the operative forces in the sector as well as creates significant and relevant benefits deriving by the cultural site.

Besides the existing emergencies, that now also constitutes real value elements, there is a considerable asset that need to be mentioned. The level of efficiency of the stakeholders and policy makers reflects on the capacity to address commonly all these elements in terms of economic growth and development. Therefore, it seems necessary to develop logical approaches based on continuous and high-level quality to ensuring the general objective for maintaining the highly operative profile of the Plan.

At the heart of the Valorisation Programme, there is **Rocca degli Alberi**. The historical building is purposed to become the museum and the didactic centre of the Middle-Age walled cities of Veneto Region.

Besides the great opportunities for the city of Montagnana and its territory, the ROCCA and the overall programmes can represent a strategic opportunity for the promotion of cultural tourism.



The creation of the new cultural institution provides a point of reference for the knowledge, understanding and study of the Middle Ages. Furthermore, it becomes an important mean for the creation of a system that promotes the territory and valorises these city centres that are facing difficulties in the large tourism market and its main stakeholders.

The program is divided into three consequential phases, based on the short-, middle- and long- term objectives, referred to diversified actions and whose outputs aim at the valorisation process of the good. Therefore, it is necessary to move from sectorial promotional strategies to integrated strategies targeting the large territorial development and strengthening development mechanisms within the local area. More precisely, a network to integrate the valorisation action with the activities of the productive sectors, infrastructures and, more generally, with all stakeholders represents the eco-systemic approach of the programme itself.





## 6 Knowledge exchange seminar. The value of cultural heritage understading for a renewed competitive model of cultural attractiveness.

**Contributors: Raffaella Lioce, Camilla Ferri, Dario Bertocchi**

### **The economic value of cultural heritage - Raffaella Lioce**

Heritage is what we inherit from the past, but more specifically what we retain of this inheritance. The heritage value of a place is also known as its cultural significance which means its aesthetic, historic, scientific, social or spiritual value for past, present or future generations.

Understanding what is meant by value in a heritage sense is fundamental since 'Value has always been the reason underlying heritage conservation: It is self-evident that no society makes an effort to conserve what it does not value'. There is no single approach to assessing value when discussing heritage places.

Decisions about cultural heritage have traditionally been made by the specialists and experts in the matter. However, it is incontestable that decisions of Built Cultural Heritage regarding conservation and management of heritage resources have important economic repercussions and conditioning factors.

- On the one hand, conservation and valorisation policies affect individual and collective welfare:
- On the other hand, the heritage policies are conditioned by a wide range of economic factors that affect the decision making process, especially in terms of the choice of tools for the valorisation and of the use of heritage goods.

At present, the "Economics of heritage" is an established area of investigation in cultural economics, with an expanding literature that has been developed mainly around three fields of study:

- the economics of museums,
- the art markets
- the economic aspects of built heritage

(Klamer & Zuidhof 1999; Towse 2002).



Those studies usually concentrate on the analysis of the decision making processes, on their implementation and the assessment of the effects of their measures and instruments. But, they do not aim to question either the perception of value for individuals and communalities.

In order to understand the value people attaches to CH, we can refer to the Special **Eurobarometer n. 466** titled “**Report on Cultural Heritage**” – edited in September-October 2017. The Eurobarometer was commissioned by the Directorate-General for Education, Youth, Sport and Culture to assess the attitudes and opinions of Europeans about cultural heritage.

The Questions covered by the study include:

- personal involvement in and interest in cultural heritage;
- barriers to accessing cultural heritage sites and events;
- perceived importance of cultural heritage to respondents personally;
- perceived importance of cultural heritage to the local community, region, country and the EU as a whole;
- the values attached to Europe’s cultural heritage and perceptions of European culture;
- the impact of cultural heritage on tourism and jobs;
- who should be primarily responsible for protecting Europe’s cultural heritage.

The majority of Europeans say they live close to historic monuments or sites, and just over half have some personal involvement in cultural heritage. Large majorities think cultural heritage is important to them personally, as well as to their community, region, country and the EU as a whole. Large majorities take pride in cultural heritage, and agree it can improve quality of life and a sense of belonging to Europe.

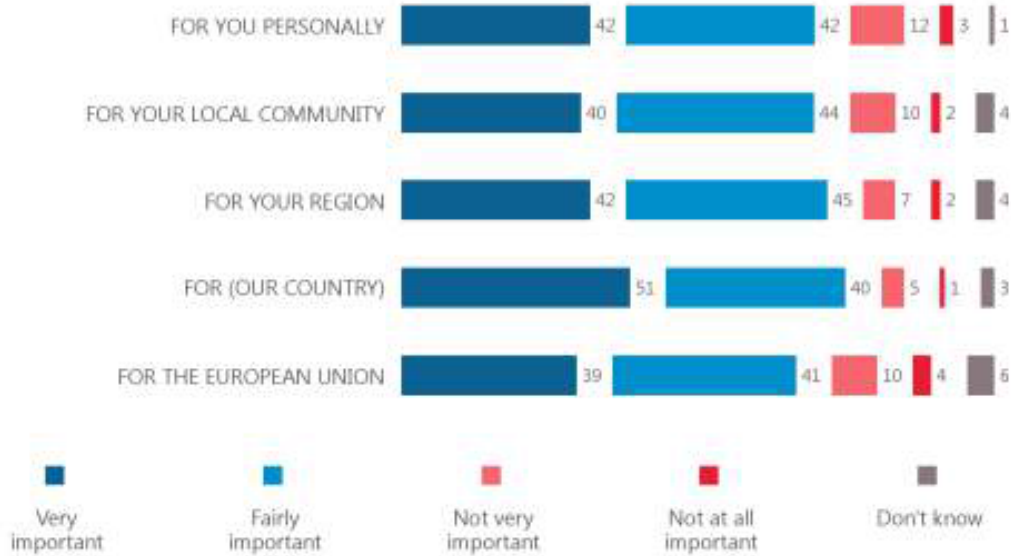
Respondents have accessed a wide range of cultural heritage in the last 12 months yet lack of time is the most common barrier to access cultural heritage sites or activities, followed by cost.

A large majority think cultural heritage and related activities create jobs. Most respondents think public authorities should allocate more resources to cultural heritage, and that public authorities including the EU should do the most to protect cultural heritage.

Respondents are most likely to think cultural heritage is important for their country, but large majorities also think it is important for them personally, as well as for their local community, their region, and for the EU:



**QB2** How important do you think that cultural heritage is...?  
 (% - EU)



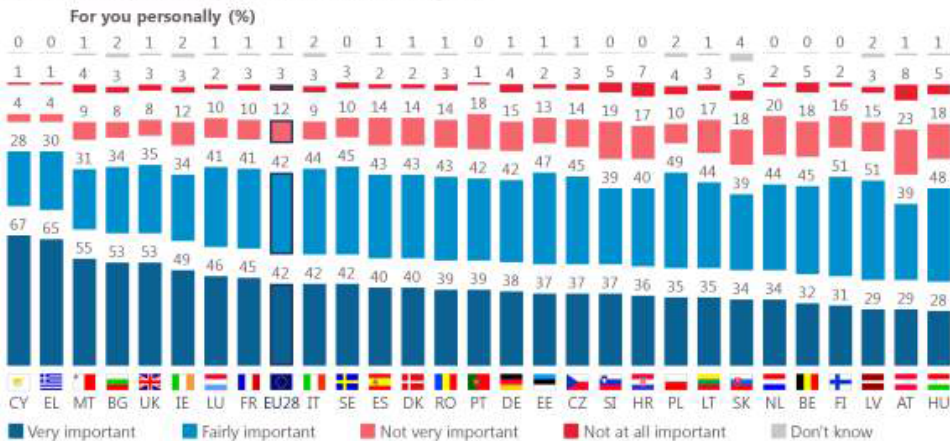
More than eight in ten (84%) think it is important to them personally, with 42% thinking it is very important.

Proportions range from 95% of respondents in both Cyprus and Greece and 88% in the United Kingdom to 68% in Austria, 73% in Slovakia and 76% in Slovenia, Hungary and Croatia.

There are five countries where at least half say cultural heritage is very important to them personally: Cyprus (67%), Greece (65%), Malta (55%), Bulgaria and the United Kingdom (both 53%).

This compares to 28% in Hungary, 29% in Austria and Latvia.

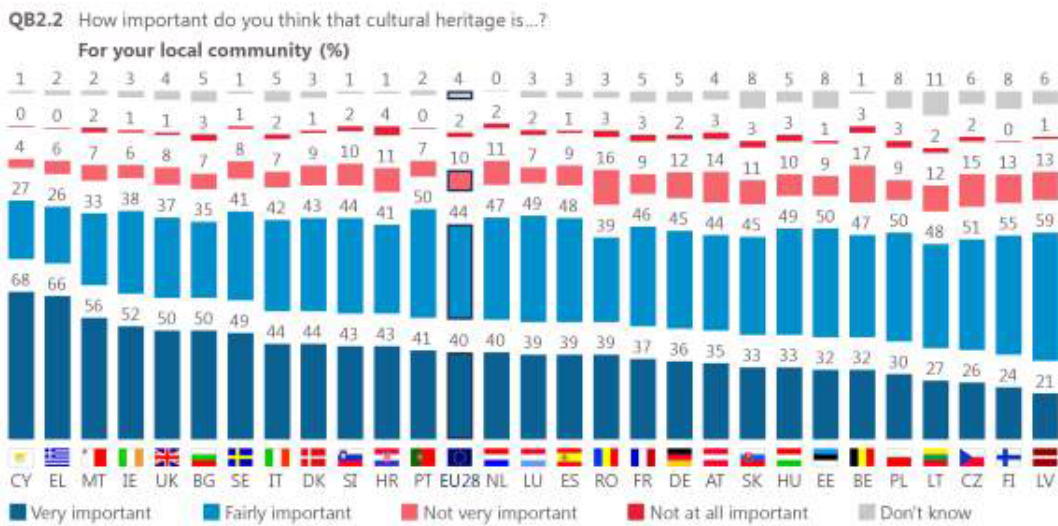
**QB2.1** How important do you think that cultural heritage is...?





At least three quarters of respondents in each country think cultural heritage is important for their local community.

Almost all respondents in Cyprus (95%) think this way, as do 92% in Greece and 91% in Portugal. Three quarters in Lithuania (75%), 77% in the Czech Republic and 78% in both Romania and Slovakia think the same way. At least half of all respondents in Cyprus (68%), Greece (66%), Malta (56%), Ireland (52%), the United Kingdom and Bulgaria (both 50%) say cultural heritage is very important for their local community. At the other end of the scale, 21% in Latvia, 24% in Finland and 26% in the Czech Republic say the same.



More than three quarters of respondents in each country think cultural heritage is important for their region.

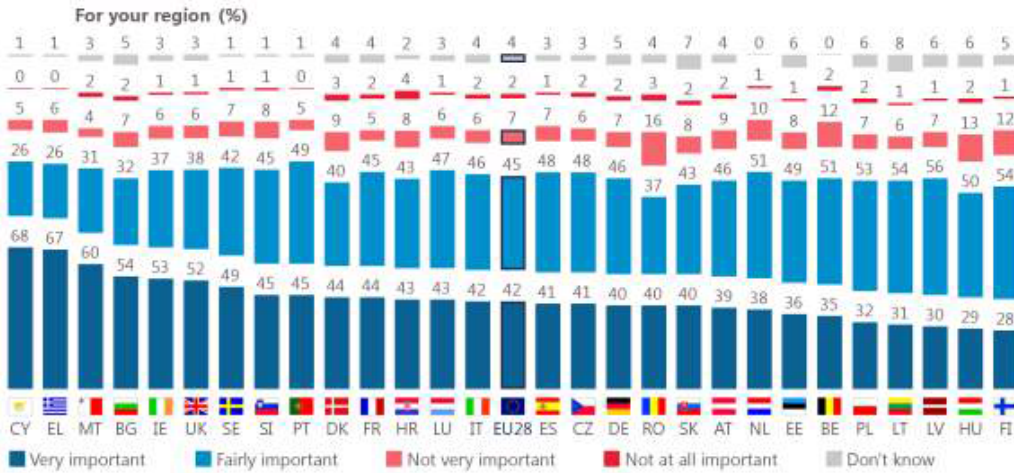
Proportions range from 94% in both Portugal and Cyprus and 93% in Greece to 77% in Romania, 79% in Hungary and 82% in Finland.

At least six in ten respondents in each country think cultural heritage is important for the European Union.

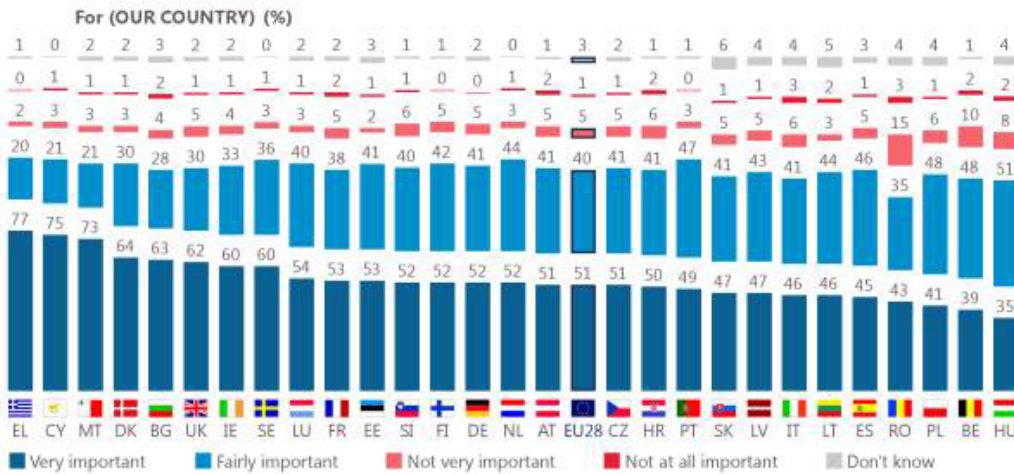




**QB2.3** How important do you think that cultural heritage is...?



**QB2.4** How important do you think that cultural heritage is...?

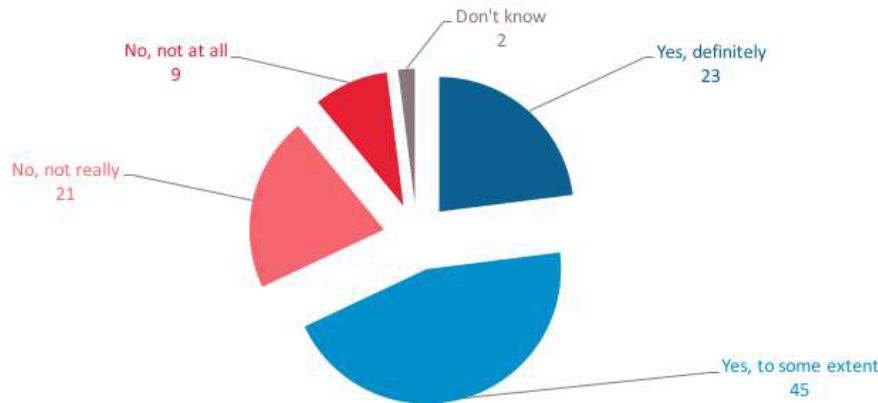


Respondents were asked if they would like to know more about Europe’s cultural heritage.

- Almost seven in ten (68%) say they would: 23% would definitely like to know more, and 45% would like to know more to some extent.
- Three in ten (30%) would not like to know more, with 9% saying not at all.



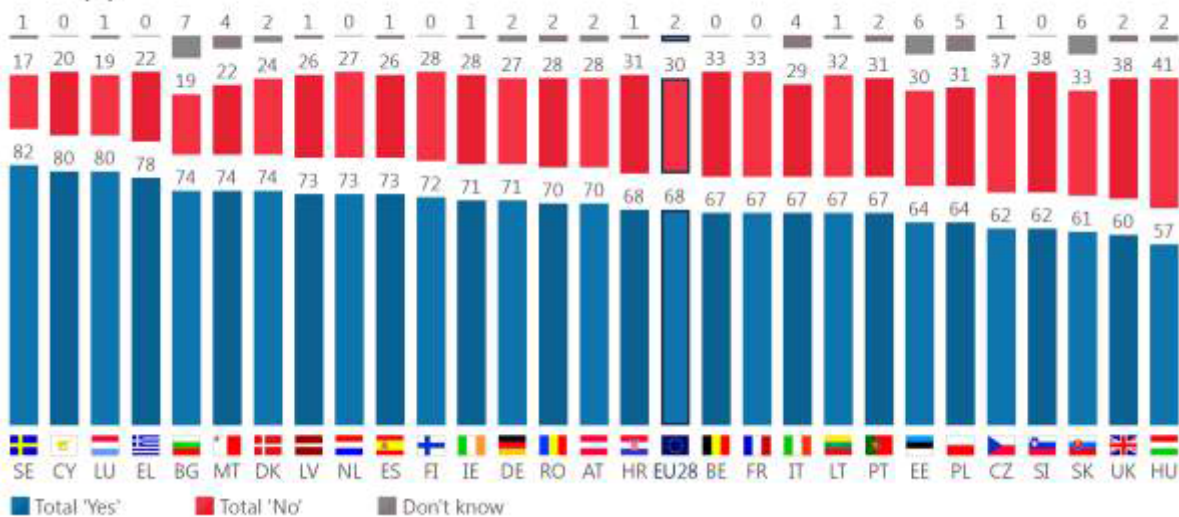
**QB12** Overall, would you like to know more about Europe's cultural heritage?  
 (% - EU)



The majority of respondents in each EU Member State would like to know more about Europe's cultural heritage, with proportions ranging:

- from 82% in Sweden and 80% in both Cyprus and Luxembourg
- to 57% in Hungary, 60% in the United Kingdom and 61% in Slovakia.

**QB12** Overall, would you like to know more about Europe's cultural heritage?  
 (%)

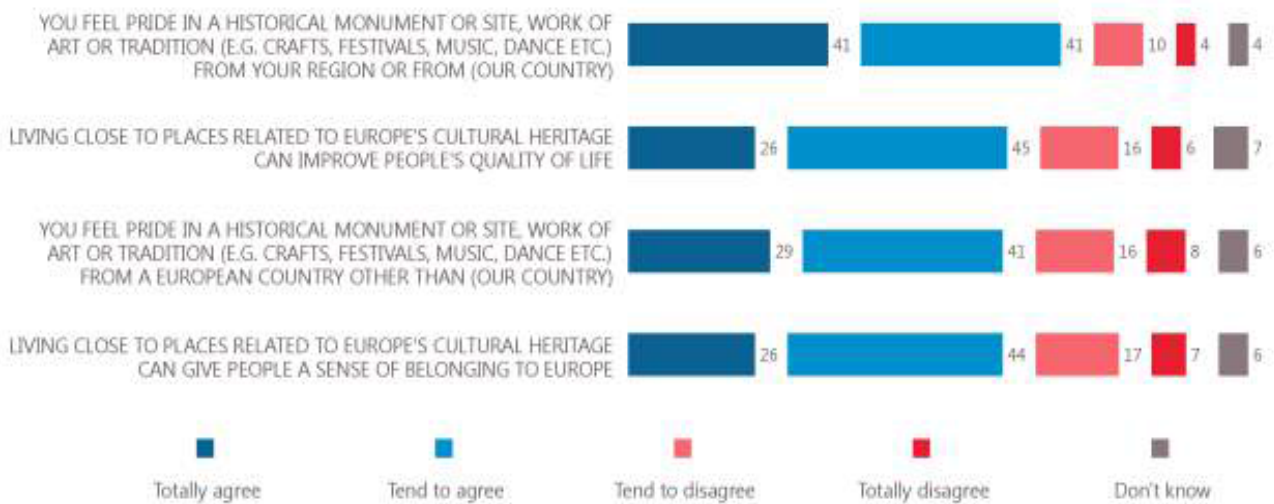


More than 7 in 10 agree they feel pride in a historical site, work of art or tradition from their region or country, ranging from 96% in Greece, 93% in Portugal 92% in Cyprus to 73% in Austria, 75% in both Luxembourg and Germany. More than 7 in 10 agree living close to places think CH can improve people's quality of life (71%), while 70% agree they feel pride in a historical monument or site, work of art or tradition from a European country OTHER than



their own, or that living close to places related to Europe's cultural heritage can give people a sense of belonging to Europe...

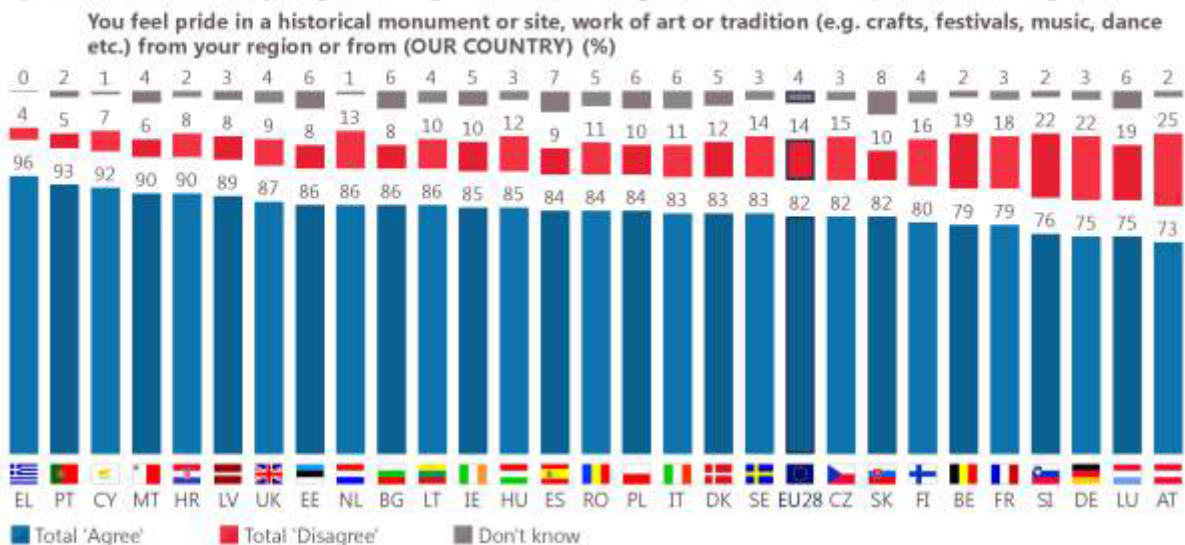
**QB7** To what extent do you agree or disagree with the following statements about Europe's cultural heritage. (% - EU)



More than six in ten respondents in each country also agree they feel pride in a historical monument or site, work of art or tradition from a European country other than their own.

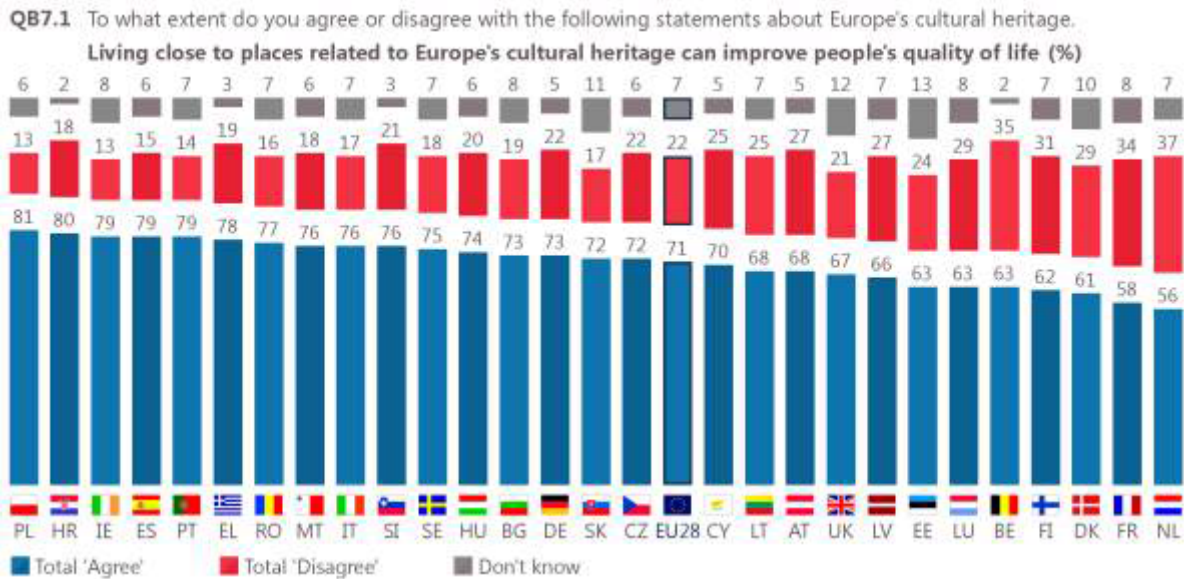
Respondents in Malta (83%), Cyprus (81%) and Ireland (78%) are the most likely to agree, compared to 61% in Austria and 63% in both the Netherlands and Slovenia

**QB7.3** To what extent do you agree or disagree with the following statements about Europe's cultural heritage.





More than half of the respondents in each EU Member State agree living close to places related to Europe's cultural heritage can improve people's quality of life. Proportions range from 81% in Poland, 80% in Croatia and 79% in Ireland, Spain and Portugal to 56% in the Netherlands, 58% in France and 61% in Denmark.



Respondents who live close to a form of cultural heritage, or who are personally involved, are more likely to agree with statement.

For instance, 74% of those who live close to cultural heritage agree living close to places related to Europe's cultural heritage can give people a sense of belonging to Europe, compared to 58% of those who do not live close to cultural heritage.

Finally, respondents who are interested in knowing more about Europe's cultural heritage are more likely to agree with each statement, compared to those who are not interested



QB7 To what extent do you agree or disagree with the following statements about Europe's cultural heritage.  
(% - EU)

	Living close to places related to Europe's cultural heritage can improve people's quality of life		Living close to places related to Europe's cultural heritage can give people a sense of belonging to Europe		You feel pride in a historical monument or site, work of art or tradition (e.g. crafts, festivals, music, dance etc.) from your region or from (OUR COUNTRY)		You feel pride in a historical monument or site, work of art or tradition (e.g. crafts, festivals, music, dance etc.) from a European country other than (OUR COUNTRY)	
	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'	Total 'Agree'	Total 'Disagree'
EU28	71	22	70	24	82	14	70	24
<b>Age</b>								
15-24	69	23	71	23	80	16	69	24
25-39	72	22	72	22	84	13	71	24
40-54	74	21	72	24	84	13	72	23
55 +	70	22	66	25	82	13	69	24
<b>Education (End of)</b>								
15-	64	23	60	27	77	16	64	26
16-19	71	23	69	25	82	14	68	26
20+	75	21	75	22	87	11	75	21
Still studying	73	20	76	19	80	16	72	21
<b>Socio-professional category</b>								
Self-employed	77	19	75	21	85	12	73	22
Managers	76	20	76	21	88	10	75	21
Other white collars	75	20	74	22	87	11	75	20
Manual workers	69	24	68	26	81	15	67	27
House persons	71	20	67	24	81	14	66	27
Unemployed	67	26	65	29	78	19	65	30
Retired	67	23	65	25	80	14	68	24
Students	73	20	76	19	80	16	72	21
<b>Difficulties paying bills</b>								
Most of the time	65	26	59	32	80	16	63	31
From time to time	72	21	69	24	81	15	70	23
Almost never/ Never	72	22	72	22	83	13	71	23
<b>Close to cultural heritage</b>								
Total 'Yes'	75	20	74	21	88	10	76	20
No	60	30	58	31	69	24	57	34
<b>Interest in cultural heritage</b>								
Total 'Yes'	80	16	78	18	90	8	80	16
Total 'No'	53	35	51	37	66	26	49	41

Base: all respondents (N=27,881)

## The Value of CH

To investigate the economic category called “value” of tangible cultural heritage, we have to consider that like any other consumer or capital goods, heritage goods are subject of economic activities (Krebs & Schmidt-Hebbel 1999, 211).

Their protection, knowledge, conservation and diffusion have a cost; they are traded in formal and informal markets; they generate satisfaction and benefits to individuals and communities that have access to them; and they constitute a potential input in the production of other goods and services.

Therefore, it is possible to analyse the heritage sector from an economic point of view. The fact that it is feasible, nevertheless, does not mean that it is a simple issue.

A brief review of economics literature demonstrates that there are common features between the economic and cultural methods regarding heritage valuation, to the extent that a correct economic evaluation of a heritage project has a significant importance in the decision-making process: any decision with respect to preservation, restoration or re-use, involves limited resources and, consequently, a ranking of the needs to be satisfied by them.



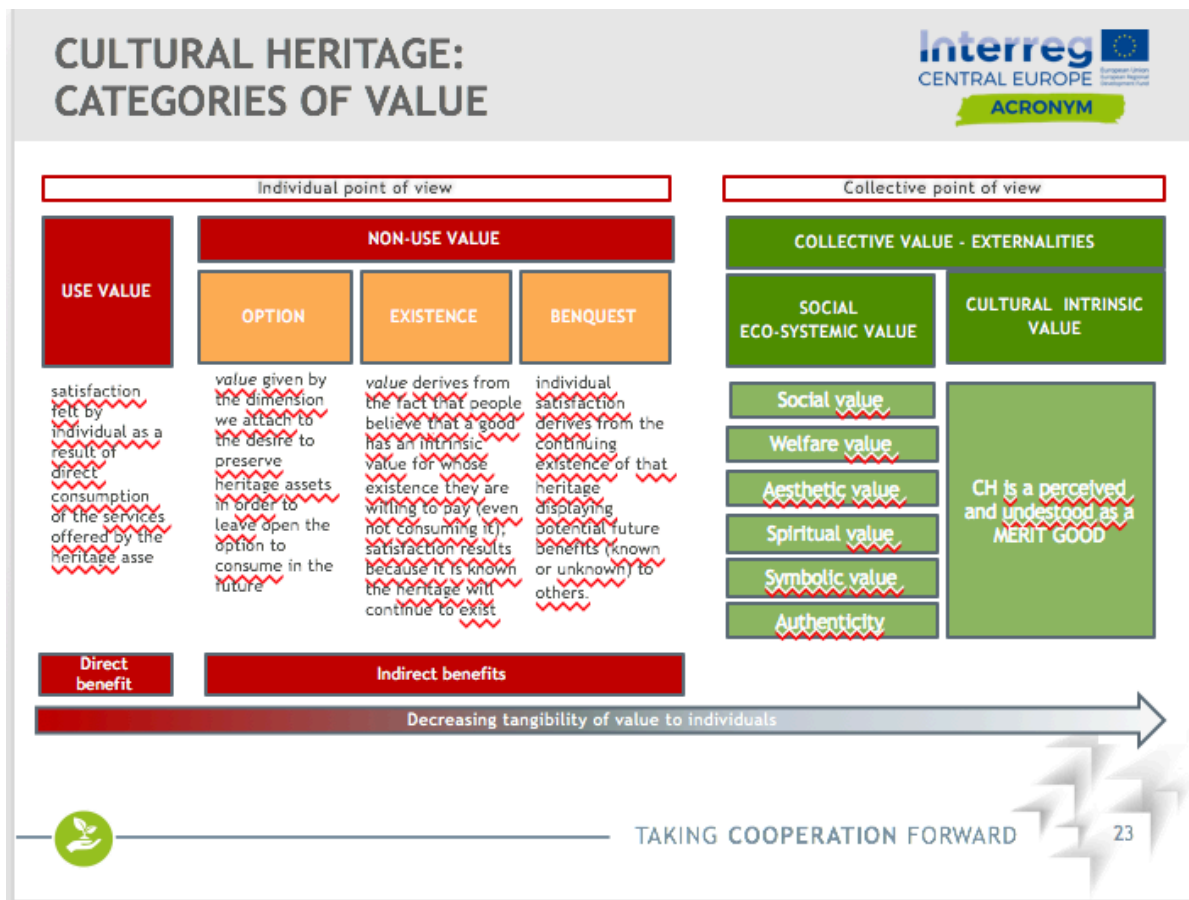
Once used for heritage maintenance and preservation, the resources cannot go in alternatives – resulting an opportunity cost attached to them. Talking about the “value” of built heritage goods makes reference not only to their simple physical asset value: it refers to all kinds of cultural and social values, in their intrinsic and extrinsic forms, that are currently assigned to these goods. Talking about the “value” of built heritage goods makes reference not only to their simple physical asset value; it refers to all kinds of cultural and social values, in their intrinsic and extrinsic forms, that are currently assigned to these goods. There is no single approach to assessing value when discussing heritage places but three approaches are referred to most often:

- The value derived from individual perceptions or from value that individual attach to heritage: heritage values can be measured in terms of an individual’s willingness to pay for conservation or accept compensation for its loss. From an economic point of view, most authors distinguish two basic components of this aspect of the economic value of heritage goods: **the USE and the NON USE value.**
- The value derived from social interaction: the basic assumption in this case is that heritage enhances social capital and community welfare.
- The third value is a consequence of the intrinsic value of heritage; in this case CH is considered a merit good.

The first type of demand is the demand of use, based on the use value or immediate utility coming from the benefit derived from the direct consumption of built heritage goods and services.

The second type of demand, the demand of non-use, is made up of three components:

- an option demand deriving from those individuals that are not users of the heritage goods at the moment, but assign a value to the possibility to visit them in the future;
- an existence demand, based on the existence value assuming that heritage goods have an intrinsic value independent of their use value;
- and finally a bequest demand, that is based on the utility that individuals of present generations obtain from the knowledge that heritage goods can be enjoyed also by future generations.



The demand of heritage at the present time is very complex, because there are manifold sources of demand, that in many cases are even incompatible.

Furthermore, these demands are not usually revealed through the market.

It is in principle possible to charge for satisfying the demand of use, either cultural or non-cultural, but the situation is very different when considering the demands of non-use of the heritage goods.

When we deal with CH we have to consider that related demands are not expressed through conventional market mechanisms, and will thus have no effect on resource allocation processes of the heritage market.

Speaking about CH value we cannot not considering its collective cultural dimension which can be measured, by assessing the impacts and effects that CH provides to socio economic context.

There are diverse method to assess the value of CH, and they can be clustered in

- revealed preferences



- expressed preferences

if we then would also assess the sustainability of CH investments we can approach the CBA and multi-criteria or multi-objective methods.

*Consideration on CONTINGENT evaluation*

*The resulting average of willingness-to-pay is then multiplied by the relevant population to estimate the total value of the willingness-to-pay.*

*Although, at first sight, the method looks simple, it is not problem-free: respondents can find out from the interrogators the most part of the information; respondents can be influenced by their own interest; answers are affected by the fact that the market is a hypothetical one, that is not necessarily real; and, not least, the way in which information is presented can influence individual responses. In addition, it has been observed that people have the same willingness-to-pay both for a part of the evaluated good and the whole good. Accordingly, the results of these studies are often contested, ranging in a large interval.*

## EVALUATION METHODOLOGIES

Even if, as a general rule, the economic value could be estimated, in real life it is hard to achieve

	<b>USE VALUE and NON-USE VALUE</b>	<b>COLLECTIVE VALUE</b>	
Revealed preferences	Hedonic price	Discrete choice modelling - Conjoint	Cost Benefits analysis
	Travel cost		Impact assessment
Expressed preferences	Contingent valuation	<p>It is restricted to comparing a single choice with a current situation. The heritage asset is described as a set of attributes, where each attribute can have many possible values, in a given interval. Attributes' combinations are aggregated to build possible scenarios. Interviewees are presented hypothetical options and a given situation and are asked to select the one they prefer.</p>	<p>Economic Cash flow analysis</p> <p>Integrated Quantitative - qualitative methodologies assuming a set of objectives and related indicators .</p>

While the cultural assessment of historic heritage may be sound in a theoretical sense, providing a fully articulated model of cultural heritage remains difficult given the multi-dimensional nature of cultural value.  
D. Throsby 2001

TAKING COOPERATION FORWARD

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While economic studies have developed a series of analytical tools and methodologies to evaluate the values and benefits of historic heritage places the cultural disciplines and conservation professionals have been 'challenged to elaborate on existing tools and devise additional tools to evaluate non-economic, cultural values'.

In the Ruins project we would understand the perception of value and not necessary measuring the value in monetary terms. Our challenge is both to understand the values that people attach to a number of attributes of protection afforded to heritage places; and identify people's views on a number of matters which would point to the social capital associated with heritage place protection.

We would understand

- Why do people attach a value to CH?
- Which is the community attitudes to historic built heritage? And to related conservation goals?
- if people believe that
  - Looking after heritage is important in creating jobs and boosting the economy
  - Their life is richer for having opportunity to visit or see heritage
  - It is important to protect heritage places even though they may never visit them
  - Heritage is part of collective/European identity
  - Heritage is part of landscape' character and identity
  - Enough is done to protect and enhance historic built heritage
- if the perception of heritage value decreases, when individual direct benefits decreases.

### **Traditional and modern approaches to management of ruins: assessing the competitiveness of cultural heritage - *Camilla Ferri***

European cities pride themselves on a long history of tourism mostly thanks to the large number of cultural assets they own. However, their mere presence does not constitute an economic value and it is not sufficient to make tourism an agent of local development, as it is claimed to be by numerous municipalities in recent years. In order to fulfil this aim, existing resources have to be promoted in conjunction with other forms of tourist attractions, spanning from events to gastronomy, high quality infrastructure and whole regional networks, without losing from sight the necessity to bring about a diverse, original and attractive image (A. P. Russo & J. Van der Borg, 2002). This is particularly important in a time



of public funding shortages, in which private entities risk to use cultural heritage for their personal interests, bringing to commodification, banalization and lose of culture value. To avoid such a situation, tourism should be seen as a system in which all the components are not only important in their relation to each other within the destination but also as key factors for its Sustainable Competitive Advantage (SCA).

Many cultural assets are essentially similar, in fact most temples, historic buildings, festivals and even indigenous performances tend to be monotonous after a while for most tourists, which hence becomes often reluctant in visiting this kind of attractions (McKercher & Ho, 2006).

How to distinguish the specific value of a heritage site, if existing? How to comprehend where to focus efforts and investments?

Tourism Economics and Geography Literature offers several tools focused on the assessment of cultural heritage sites competitiveness which aim at assisting *planners*, from municipalities to DMOs, in the difficult task to manage not only heritage quality and significance, but also all the parallel aspects (like communication, accessibility) often neglected in cultural and tourism planning.

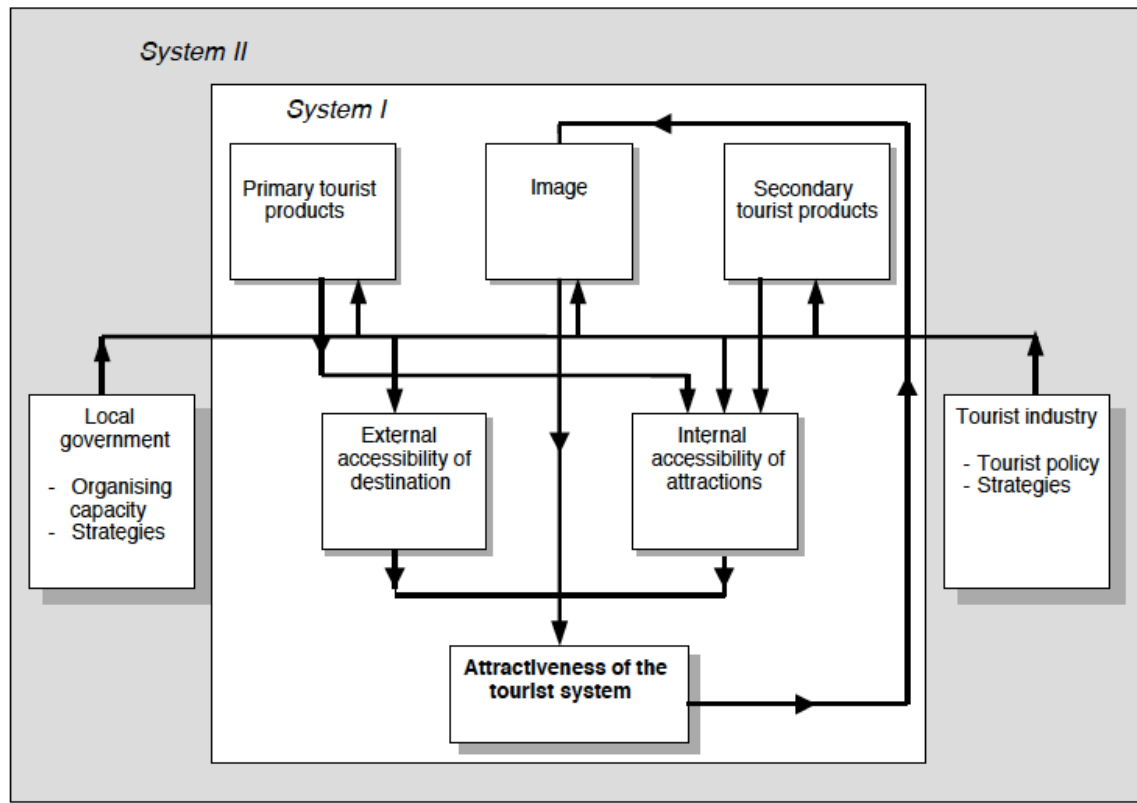
Among them, Van den Berg, Van der Borg, Van der Meer Urban Tourism Product Model (1995) analyses the whole destination, while Jansen-Verbeke Hardware-Software-Orgware Model (2012) studies the site as a complex of physical, experiential and management features and McKercher, Du Cros Robusticity-Market Appeal Model (2002) focuses on the relationship between heritage conservation and tourist use at the site level.

### ***Some tools to assess competitiveness of tourism destination and cultural heritage sites***

#### *The Urban Tourism Product Model*

At a destination level, Van den Berg, van der Borg and van der Meer (1995) elaborated the so called the *Urban Tourism Product Model* with the aim of evaluating the overall attractiveness of an urban tourism system.

*Figure 1 - Van den Berg, van der Borg, van der Meer Urban Tourism Product Model*



Source: Van den Berg et al.; 1995

The relations which characterize it have been gathered into two main groups: System I and System II. The former shows the factors that determine the competitiveness of a tourist destination:

- the “primary product” which corresponds to the main reason for visiting the place: natural and cultural landscape, historical features, events and other man-made attractions.
- the “secondary products” (hotels, restaurants, conference centres, exhibition halls)
- the “image” (the perception of potential tourists)
- the “external and internal accessibility” (the effort required to reach the destination and the ease of wandering around the locality and reaching the various attraction points during the stay)

The latter indicates how the public and private sectors can influence and implement through deliberate actions the development of that urban tourism product. As the framework shows, the main responsible actors in the tourism strategy are the municipality (public actor) and the tourism industry (private actor). Organizing capacities of the local government and cooperation through public-public and private-public partnerships are essential in this process. Nevertheless,



also the tourism sector has its own responsibility in enhancing through its strategy all the elements of the tourism system.

Some years later, this theoretical framework was further implemented by Russo and Van der Borg (2002) with the concept of *visitor-friendliness*. They believe the challenge for the competitiveness of a cultural tourist destination consists nowadays in finding a point of balance between the distinctiveness of its cultural assets and their communication to the public and the standardization and predictability that the tourism industry infrastructures needs to reach to be included in the global tourism market. Besides, the success of a cultural system is determined by a consumer-oriented management strategy capable to identify a niche position responding to a super-segmentation of the market.

### ***The Hardware, Software & Orgware Model***

Moving the focus on the site level, the geographer Jansen-Verbeke based her studies on the so-called “territoriality paradigm”, according to which cultural resources cannot be distinguished from the context in which they are embedded.

Despite the specific peculiarities of every cultural site, a number of common issues have been identified and ordered in a framework according to three different, yet connected cultural dimensions of heritage sites: *Hardware, Software* and *Orgware*.

On a local perspective, the concept of Hardware regards the location aspects of a heritage site (its integration with the landscape and the destination, its proximity with other remarkable sites, its accessibility and connection with main tourism gateways), its spatial characteristics (its size and scale, its internal spatial structure, its carrying capacity) and some aspects related to its robustness (fragility of tangible asset, risks connected with tourism pressure and ability to manage these impacts). On the other side, on a regional perspective, it analyses the position of the site inside the destination.

*Figure 2 – Jansen-Verbeke Model*



HARDWARE of Heritage Site & Territory		SOFTWARE of Cultural Tourism Product		ORGWARE Agents and Organization	
IN HERITAGE SITE	IN TOURIST DESTINATION	PRESENTATION & INTERPRETATION	TOURIST APPEAL & EXPERIENCES	PUBLIC & PRIVATE AGENTS	STAKEHOLDERS LOCAL & GLOBAL
SITE MANAGEMENT local	DESTINATION MANAGEMENT regional			POWER & INVOLVEMENT	INVOLVEMENT & INTERESTS
Monitoring Physical impact Robustness - Fragility	Sustainable Development of Infrastructures	Valorising tangible and intangible Heritage	Uses and affinity with the site	Awareness of sustainable tourism potentials	Inclusion & exclusion in decision making
Carrying Capacity	Tourist Space-use Patterns	Visitor Centre - facilities	Visitor Management	Business opportunities of TOS	Connections and disconnections Global - Local
				Ownership & Competition	Ownership & Stewardship
Selection & Planning of Cultural Resources	Zoning & Clustering of TOS	Innovation & financial resources	Creativity & Marketing	Motivation & incentives	Partnership

*Source: Jansen-Verbeke; 2012*

*Software* coincides with the site skill to attract visitors delivering a positive tourist experience. Differently from the *Hardware*, this dimension changes over time according to fashion trends and innovations. Presentation and interpretation of the heritage site are the first fundamental variables to take into account since they create a connection between the place and the visitor. They are assessed analysing the quality of the visitor centre services (if there is one), the way in which the message is communicated through the heritage presentation (for example, by a tour guide), the presence of a link between tangible and intangible assets (traditions, music, food, handicrafts, etc..). Tourist appeal of the site is evaluated through its reputation in potential visitors' mind and the analysis of target groups within the brand strategy.

*Orgware* represents the organizational capacity of a destination, which results from the types, the powers and the cross-sectoral networks of both private and public organizations and their management structures. In order to understand perspectives and constraints of the *Orgware*, three main levels of analysis have to be explained: stakeholders, management and policy.



The first regards the power balance among the actors involved in the ownership and stewardships of the site, the presence of partnerships, the involvement of local communities and their influence in decision making processes. The second aims at examining the idea behind the management of a site through the analysis of its management plan and its level of commodification. The policy aspect highlights the dynamics related to the pursuit of economic advantages through *tourismification* and the framework given by government and conservation legislation.

### ***Robusticity-Market Appeal Model***

Besides Jansen-Verbeke's, another important contribution for the assessment of tourism potential of cultural heritage attractions has been provided by Hilary Du Cros and Bob McKercher (2002), who focused their studies on the relationship between conservation and tourism. In order to provide effective and case-specific management actions, they translated these two dimensions into two variables, *Robusticity* and *Market Appeal*: sustainable tourism development is reachable when the latter is correlated with the ability of the asset to cope with increased visitation or to be modified for use in a manner that does not compromise its values. In particular, their model consists in a 3x3 matrix in which these two dimensions are classified according to a quantitative evaluation which can assume the categories "high" (3), "moderate" (2), "low"(1). The score is assigned taking into account a series of indicators deriving from a previous phase of context and issues investigation. The sum of the scores of the variables is then plotted to position the asset into the following matrix (figure 3).

*Figure 3 - McKercher-DuCros Market Appeal-Robusticity Matrix, first version*



	HIGH			
		D1	C1	A1
<b>Robusticity</b>		D2	C2	A2
	LOW	D3	B2	B1
		LOW		HIGH
		<b>Market Appeal</b>		

Source: B. McKercher & P.S.Y. Ho, 2006

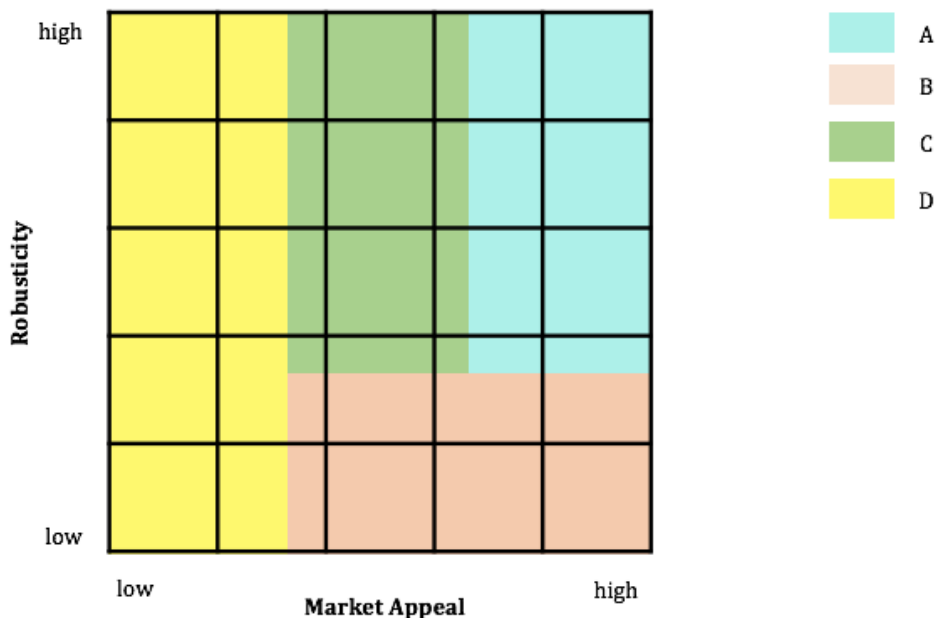
The status the asset occupies indicates the actions to be taken in the perspective of a cultural tourism planning for that site. ‘A’ grade assets have moderate to high *Market Appeal* and moderate to high *Robusticity*. These assets are ideally suited for significant tourism activity, no strong interventions are needed to protect the cultural values from the impact of heavy tourist flows, neither to enhance visitors appeal. ‘B’ grade assets have strong to moderate *Market Appeal* but a low *Robusticity*. The reason can rely in a physical fragility of the structure or in a situation in which cultural values are mined by mass visitation. Strict conservation and visitor management measures are required to avoid the achievement of a point of no return in which the site and its cultural significance are definitely damaged by an unsustainable tourist use. On the contrary, ‘C’ grade assets have a high or moderate *Robusticity* but a limited *Market Appeal*. In this case, the adoption of a marketing plan capable to exploit the potential given by the site robustness is a desirable option, however managers can also decide to maintain this status quo and accept the presence of limited tourist flows. ‘D’ grade assets represent a borderline case in which both *Market Appeal* and *Robusticity* are at a low level. Therefore, they should be preserved for reasons other than tourism and, even if not easy, managers should be convinced towards this decision.

Various empirical tests (Du Cros, 2000; Li & Lo, 2004) proved not only the framework’s efficacy as a preliminary assessment tool, but also its ability to provide insights into future management strategies, descending mainly from the identification of four key dimensions. Nevertheless, the



model also has some shortcomings that relate principally to the subjective nature of its indicators (B. McKercher and P.S.Y. Ho, 2006). Furthermore, Li and Lo (2004) show a tendency in obtaining results in the central positions of the matrix, thus even if the auditor sees a fatal flaw, he cannot give it the importance it deserves in the final assessment (B. McKercher and P.S.Y. Ho, 2006). In order to remedy to these limits, Bob McKercher and Pamela S.Y. Ho (2006) provided an alternative assessment protocol as an implementation of the Du Cros Model (2001). The main innovation consists in the disaggregation of the Du Cros model into four constituent dimensions: cultural, physical, product and experiential values. Their assessment is done following a series of sub-indicators, which are sort of guidelines questions whose answers have to be given on an ordinal scale based on five categories of 'Low', 'Low/Moderate', 'Moderate', 'Moderate/High', and 'High'. Thus, the previous model matrix 3x3 turns into 5x5, as showed by figure 4.

Figure 4 – The updated version of McKercher-DuCros Robusticity-Market Appeal Matrix



Source: Personal elaboration based on B. McKercher & P.S.Y. Ho, 2006

The level of tourism potential of the asset is obtained through an overall assessment, which takes into account the results reached evaluating the aforementioned dimensions, and also a consideration on fatal flaws, which was an important shortage in the previous version of the





model. However, being qualitative, the assessment still risks to be influenced by personal bias and subjective perspectives. In order to avoid such circumstances, authors recommend cross-training in which tourism is the training emphasis for the cultural heritage management (CHM) sector and CHM principles are emphasised for tourism industry workers (McKercher & Ho, 2006). Two or more external auditors are preferred in this process in order to reduce risks of subjectivity. In this way, the potential emergency of divergences indicates the necessity to rethink the just done assessment.

## Conclusions

Understanding the forces that are transforming cultural landscapes into *tourismscapes* is a crucial step into visionary planning and responsible management of regions and places. Nowadays, the emerging gap between dynamic and less dynamic cultural regions is not much given by the actual accumulation of monuments, museums or historical landscapes, but even more on the liveliness and liveability of intangible heritage elements such as traditions imbedded in the agricultural or industrial history and habitat. In such a situation, the challenge is managing this interdependency between tangible and intangible heritage in an innovative and creative way (Jansen-Verbeke, 2007).

Above showing the importance of different dimensions characterizing both the destination and the site, these studies also highlight that the quality of the sites and their attractiveness depend on the organization of a cultural product able to satisfy both tourists, towards whom the supply has to be differentiated according to the various targets, and residents, for whom heritage in the local territory is the first reference to look at to satisfy their needs regarding good life quality, sense of community belonging, social cohesion and urban quality. Therefore, destination managers should be aware that, if strategically managed, cultural heritage can have a direct positive impact on the territory.

In this perspective, a network approach for the destination governance can be useful to reach cultural tourism destination competitiveness and sustainability. Therefore, cultural heritage should be considered as a “portfolio” composed by a series of different kinds of assets, which have to be implemented not only on the single asset level, but also as a *system* (Caroli, 2012), even considering the actors gravitating towards them.



Furthermore, the aforementioned models could be implemented including aspects related to the perception of the site in the local population, its potential participation into the visit experience and the sharing of tourist spaces, which these frameworks do not seem taking deeply into account.

### **Using big data to detect cultural heritage attractiveness**

**by Dario Bertocchi .**

In the last decades, ICTs and new technologies gave new possibilities to improve cities management through social innovation and stakeholder integration. The recent social media boom gave the opportunity to internet users to be actively involved in creating and sharing information with the community on public platforms. This has caused an exponential growth of different types of platforms collecting and sharing User Generated Content data. Tourism destinations are facing the challenge of collecting, analysing and extracting information and value from social network websites. This study analyses the possibility to extract tourist behaviour data to use as a data-driven monitoring and management destination method which might be a crucial strategy for becoming a smart destination in the nearby future.

This massive infrastructure of information created by the users is nowadays object of study for the entire academic community. Different kinds of methodologies and data have already been used to discover new information affecting and supporting the decision-making process for an innovative management process of a tourist destination. Social network analysis is an important feature to study tourism destination systems and travel behaviour which can provide important insights regarding the user profile and the activities and experiences of the tourists.

A new way to monitor attractiveness of a cultural heritage site is to apply a qualitative and quantitative approach using a network analysis methodology to a User Generated Content data source 2.0 websites and platforms. Travel 2.0 platforms are considered as rich data sources for national tourism organizations, destination management organizations and other stakeholders, as well as for future travellers. The data source consists on reviews on attractions within an urban destination or of a heritage site, and information from the reviewers' profile that gave the possibility to create different user types, figuring out the behaviour and the most common spatial patterns created by inhabitants, visitors and tourists. The type of relational approach, which is looking at destination networks through the eyes of its users have been conducted mainly on an inter-destination scale. This kind of analysis makes possible to describe the structure of relations (displayed by links) between attractions and facilities (displayed by nodes) of the destination.



The patterns of clustering that can be detected through the spatial and relational analysis give the possibility to discover destination systems created by users. This knowledge can bring recommendations for destination managers as well as attraction (cultural heritage site) managers and tourism SMEs through a co-creation process. Co-creation represents a collaborative process and a new paradigm for management and innovation, providing new approaches to figure out how and by whom destination systems are created.

This way to identify attractiveness using user generated contents shows the possibility to underline destination systems created by users using a network analyses methodology applied to user generated content data regarding a tourism destination to extract adding value from the data to manage, improve and strengthen the destination dynamics. This process of interactions between individuals, destination management organisations and companies could represent a data-driven collaboration process to evolve city management procedures.

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