Heritage as an Alternative Driver for Sustainable Development and Economic Recovery in South East Europe

Sustainable heritage management: social, economic and other potentials of culture in local development

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Abstract

Heritage has different developmental potentials that might contribute to the sustainable development of a given area. In terms of sustainable development these potentials are not necessarily economic, but also include social, environmental or cultural aspects. However, heritage by itself rarely holds tangible benefits if it is not properly managed. The key challenge for attaining sustainability is to focus management on a participatory approach, which ensures public participation in the process. The paper argues that a successful and effective management of heritage depends on the people, who must be able to 1) identify the appropriate heritage, 2) link it with key stakeholders and other topics, 3) design it into a proper service, and finally 4) sell the new service to users.

Keywords: heritage; value; culture; sustainable development; public participation; SY_CULTour; Slovenia

1. Introduction

As shown by studies, heritage, if properly managed, can be instrumental in enhancing social inclusion, developing intercultural dialogue, shaping the identity of a given territory, improving the quality of the environment, providing social cohesion, stimulating the development of tourism, creating jobs and enhancing the investment climate (Dümcke and Gniedovsky, 2013, 7). The embedded local culture and heritage of a particular area represent a developmental potential, which is further emphasized by location and specific content and can represent a competitive advantage over others (Bole et al., 2013).

From this perspective, culture (in the broadest sense of the word) as well as cultural heritage can be defined with regard to their economic, social, ecological, and cultural developmental potential. Their value can also be defined—hence the concept of “cultural value,” which is intended to emphasize the developmental potentials of various forms

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of culture of a particular area (Šmid Hribar and Ledinek Lozej, 2013). The integration of culture as an “alternative” community developmental source is a concept that has also proved useful in other studies (MacDonald and Jolliffe, 2003). Cultural values are therefore some kind of a territorial capital or developmental source, which is to be experienced and enjoyed not only by tourists, but also by local inhabitants, and which can cause positive economic, social and environmental effects. At the same time, the development of tourism can pose a threat to the local inhabitants, especially if the activities and the investors “come from the outside of the community” and are merely interested in creating a profit, which has the effect more of a nuisance than a benefit on the local community (see Horáková, 2013).

The goal of the article is to present an example of cultural heritage orientated local development and illustrate a shift where cultural heritage becomes the central feature of the local community and its economic revitalization. Similar shifts in the perception of culture and heritage, not only as factors of preservation but also as factors of new socio-economic development, have recently become more apparent (see Loulansky, 2006). We place special emphasis on the role of the local community, since we believe that it is absolutely imperative, and the only sustainable option, to view the local community as the main stakeholder and benefactor in the entire process. We believe that the local community must embark on the journey of sustainable heritage management, which will guide it through discovery and conservation and finally lead them to community development.

The findings on local development, induced by sustainable heritage management, are based on our work within the SY_CULTour project, where we attempted to further local development in nine rural communities in six European countries (Italy, Slovenia, Hungary, Bulgaria, Serbia and Greece). Special focus is placed on the Slovenian pilot study of the Črni Vrh local community.

2. Materials and Methods: Discovering, Identifying and Knowing Cultural Values

We used the following methods:
- identification of cultural values,
- identification of relevant stakeholders and
  participatory approach with locals.

The procedure was carried out in 2 steps. In the first step, a general overview of the area, its existing cultural heritage and stakeholders was conducted, based on the review of literature, the existing documents and legislation, field work and work with experts. Equipped with this information, we carried out several workshops between November 2012 and March 2013, using the participatory approach with locals from the local community Črni Vrh. The first list of cultural heritage was obtained from the official intangible cultural heritage register, tourist guides, brochures and existing studies, initiatives and expertise for the area. During the first workshop, a discussion on the rural development of Črni Vrh was established and locals were asked to identify cultural values with developmental potentials according to the relevance for their area. The previously obtained inventory list of cultural heritage was used only for our orientation and was not shown to the locals. All the called out cultural values were written down during the panel and later ranked according to the locals’ priorities, which was the basis for further work.

For the purpose of finding and engaging stakeholders to be involved in this process, we carried out a stakeholder analysis, which meant identifying local leaders, interested individuals and interest groups, formal organisations, public officials and heritage experts. Personal contact proved to be the most efficient way of contacting and empowering local stakeholders to actively participate in the process. We used the following methods to find relevant stakeholders: studying documents, initiatives, and expertise related to cultural values, culture, art and tourism (databases of cultural values, heritage, best practices, field work); conversations with individuals and representatives of various organizations (institutions, associations, enterprises, professionals, etc.); browsing websites connected to the area and conducting field work (interviews).

With the participatory approach in the area of Črni Vrh the decisive factor was the successful organisation of workshops for all locals interested, since the success of such workshops always depends on a wide selection of participants. After a disappointing initial response, when the locals were invited to the workshops only through formal channels of their local community (posters and e-mails), we decided to approach all stakeholders on a more personal level. The stakeholder groups in the area of the Idrija municipality, such as municipal services, public institutions, schools, companies, societies, tourist stakeholders, guesthouses and individuals were supplemented also
with the area of the local community Črni Vrh through internet searches and field work. Phone conversations with all stakeholders allowed us to select a few additional stakeholders, while some new ones contacted us by themselves.

Before every workshop we contacted all registered stakeholders either by phone or e-mail and invited them to take part in the workshops for local stakeholders in the scope of the SY_CULTour project. For the first workshop 45 invitations were sent to stakeholders and 50 for the last workshop. All the workshops included one important local stakeholder (in our case Geoprak Idrija), which had the interest to see this region developing and which will continue the development process in the future. For the preparation of the Action plan each of the six workshops included 10 to 14 stakeholders in the formation of each individual package.

3. Developmental potentials of cultural heritage and cultural values

Although heritage and its preservation have long been regarded as oppositional to economic development, they are now increasingly seen as effective partners in the development (see Loulanski, 2006). Apart from the anthropological notion of culture, there has been less attention devoted to the functional interpretation of culture, i.e., the analysis of how cultural production and the valorization of cultural resources may foster economic development (Saccone and Bertacchini, 2011). Since not all heritage necessarily bears developmental potential, cultural values with developmental potential have been defined as follows to facilitate a better understanding of the terms: “Cultural values are various tangible and intangible elements and individual natural elements of cultural significance and local origin that are identified by the stakeholders and have economic, social, ecological, or cultural developmental potential. The developmental importance of a specific cultural value co-depends on the utility, compatibility, and the scope of developmental potential” (Šmid Hribar et al., 2012, 19).

The economic value can be determined by measuring the gross added value, the multiplier effects on the economy, tourist visits and their consumption (Nared et al., 2013), whereas the social value can be determined by measuring social cohesion, community empowerment, skill and development learning (Dümcke and Gnedovsky, 2013, 140). We have added environmental potential to the list because we discovered that sustainable heritage management is related to sustaining the complexity and stability of ecosystems – for instance, types of traditional farming activities can be linked to the prevention of soil erosion (Šmid Hribar et al., 2012). In addition, we believe that heritage can build personal creativity, personal satisfaction and foster personal artistic creativity. A detailed set of different potentials can be observed in Table 1.

Table 1. Possible developmental potentials of cultural values (see Ledinek Lozej et al., 2012).

<table>
<thead>
<tr>
<th>economic developmental potentials</th>
<th>social developmental potentials</th>
<th>ecological developmental potentials</th>
<th>cultural developmental potentials</th>
</tr>
</thead>
<tbody>
<tr>
<td>- new workplaces,</td>
<td>- preservation of local and</td>
<td>- preservation of existing</td>
<td>- inspiration and</td>
</tr>
<tr>
<td>- sustainable tourism,</td>
<td>national identities,</td>
<td>ecosystems,</td>
<td>encouragement for artistic</td>
</tr>
<tr>
<td>- forming of smaller companies,</td>
<td>- educational role of heritage</td>
<td>- maintaining the complexity</td>
<td>expressing,</td>
</tr>
<tr>
<td>- use of local materials,</td>
<td>(knowledge transfer),</td>
<td>and stability of existing</td>
<td>- active participation,</td>
</tr>
<tr>
<td>- revitalisation of the cultural</td>
<td>- development of new</td>
<td>ecosystems,</td>
<td>personal experiences and</td>
</tr>
<tr>
<td>heritage of the area,</td>
<td>knowledge,</td>
<td>- support of the local production</td>
<td>satisfaction,</td>
</tr>
<tr>
<td>- encouragement of new</td>
<td>- place promotion,</td>
<td>of organic foods,</td>
<td>- personal identification,</td>
</tr>
<tr>
<td>business approaches,</td>
<td>- incorporation of vulnerable</td>
<td>- erosion prevention</td>
<td>- spiritual experience</td>
</tr>
<tr>
<td>- encouragement of activities</td>
<td>social groups,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>relating to hotel accommodation,</td>
<td>- intergenerational dialogue,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>transport, hospitality industry,</td>
<td>- empowerment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>souvenir production and guided</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>tours</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3.1 From heritage to values – how we identified culture with developmental potential in the pilot area Črni Vrh

Knowledge of values of the selected area represents the start of a long-term process, the aim of which is to turn values which possess developmental potentials into attractive products and services. The basic list of the preparation process was based on official registries and documents, mainly on the selection of registered heritage which does not
necessarily have developmental potential. Since the focus over the last past years was mainly on material heritage, it is no surprise that the basic list included predominantly the immovable (tangible) cultural heritage, especially the profane building (mostly old homesteads), religious (church, chapels, crosses, etc) and memorial heritage (mostly monuments and memorial plaques in memory of WWII). Only one item was included in the intangible heritage, bobbin lace-making, which is characteristic of a wider area. In the second step the list changed a lot, during the workshop, where the locals themselves pointed out the cultural values in their environment for which they believed to have the developmental potential. As seen in Figure 1 the focus shifted onto the intangible heritage, where economic practices and skills are in the foreground, while some hiking trails are also mentioned. At the end of the 1st workshop the locals carried out the ranking of values according to their priorities. The goal of such ranking in the process of participation is to explain and emphasize the priorities of local stakeholders. For the sustainable management of cultural values it is of key importance to take into consideration the priorities of local stakeholders, meaning that their voices should not only be heard but also acted upon.

Table 2. The difference between the numbers of cultural heritage/values items recognized in the 1st and in the 2nd step. The last column provides items selected by public participation in the workshop. Values which the locals wish to develop into tourist products or services in the future are emphasized with the use of the bold font type.

<table>
<thead>
<tr>
<th>Cultural Heritage</th>
<th>1st step / official registries and documents</th>
<th>2nd step / participation of locals</th>
<th>Items selected in the workshop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archeological heritage</td>
<td>1</td>
<td>0</td>
<td>Windmill, Dugouts and bunkers, Tomine House, Renovation of a blacksmith’s workshop, Tower on Špičasti vrh, Flax-drying device</td>
</tr>
<tr>
<td>Secular architectural heritage</td>
<td>12</td>
<td>6</td>
<td>Military cemetery in Črni Vrh</td>
</tr>
<tr>
<td>Religious architectural heritage</td>
<td>23</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Religious-secular architectural heritage</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Memorial heritage</td>
<td>13</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Garden architectural heritage</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Settlement heritage</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Cultural landscape</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Historical landscape</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Oral tradition and folk literature</td>
<td>0</td>
<td>0</td>
<td>Singing activity</td>
</tr>
<tr>
<td>Performances</td>
<td>0</td>
<td>1</td>
<td>Observation of the night sky, Pond Flax production and processing, Making a charcoal pile, Restoration of Idrija lace, Teamsters, Lime kilns, Homemade baked goods</td>
</tr>
<tr>
<td>Custom and habit</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Knowledge of the Environment</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Economic practice</td>
<td>1</td>
<td>6</td>
<td>Trnovski cross-country marathon, Matuckar Trail, Feldbahn - Narrow gauge railway line in connection with hiking, Via Alpina hiking trail</td>
</tr>
<tr>
<td>Hiking trails</td>
<td>1</td>
<td>4</td>
<td>Ivanjšek linden tree</td>
</tr>
<tr>
<td>Natural heritage with cultural significance</td>
<td>0</td>
<td>1</td>
<td>Collection of First World War items</td>
</tr>
<tr>
<td>Item collection</td>
<td>0</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>
3.2 How we identified local stakeholders

The bottom-up approach and the goal driven planning both demand a broad array of people and organizations to be involved from the very start of the process. By actively taking part in making decisions and determining the results of those decisions, people in democratic societies gain control over their lives (Papathanassiou-Zuhrt and Sakellaridis, 2007), which could be interpreted as individual empowerment. With this reason it is very important to select as many stakeholders as possible and involve them in sustainable heritage management and consequently also in the socio-economic revitalization. Stakeholder analysis is a challenging yet crucial task for a project that depends on the involvement of the local community. The locals represent the “human capital,” and their knowledge, capabilities and personal creativity are paramount to the process of sustainable heritage management.

The first basic types of stakeholders are local inhabitants – residents. They are regarded as “holders” and caretakers of their heritage and those who will benefit from its developmental potential. Information about the possibilities and activities should be made available to all, but it is most likely that only real opinion-makers and local leaders will attend and contribute to this process. In our experience, this proved to be the most significant stakeholder group. Identification of those stakeholders was an ongoing process. Basic stakeholders were identified when studying the culture and the heritage of the area, but later on, at each meeting, stakeholders themselves identified new individuals that were then invited to participate.

Organizational and institutional stakeholders are also important and somewhat easier to identify through methods described earlier. In order to follow the bottom-up approach it is important that public officials or heritage experts abandon their usual role of “opinion leaders” or “decision-makers”. We found it more effective to define their role as advisors, who only steer the process of heritage management within the confines of sustainability, rather than taking over the process from the most important stakeholder – the local community.

3.3 How to connect people and manage culture by using the participatory approach

In recent years, the use of the participatory approach in the decision-making process has increased in frequency, meaning that the involvement of stakeholders who are interested in the decisions or have useful knowledge to share has grown. Active participation is based on a partnership involving many actors, such as politicians, citizens, experts and stakeholders. The key of any active participation is to involve different stakeholders by giving them not only the possibility to listen and watch but also the power to interact with the processes, making them accept the possibility that they could change them. The quality of the participatory process can be influenced by many different elements: content is very important, of course, but so are procedure and atmosphere. The participatory approach can be categorized into two basic types: the more directive one and the more cooperative (and less directive) one. The latter focuses on the process itself and the relationships, aiming to generate a creative group that is able to face change (Bigaran et al., 2013). A good participatory approach enables diverse opinions and voices to be heard – this creates a productive atmosphere, one which the participants will preserve in the future. For a successful participatory approach it is important to closely observe the bottom-up method, thereby reaching every single individual.

Our experience of implementing the local community of Crni Vrh into decision-making has shown that the carrying out of the participatory approach can be complicated already at the lowest possible subsidiary level, as for example the level of local community. Even though the local community agreed on inviting the local stakeholders to the workshops via its means of informing, it failed to succeed. Immediately after we started informing the local community by personally inviting people to our workshops it started to pay off. It is important to reach every potential participant and hear their voice during the workshop. Our experience teaches us that only a personal approach ensures a successful response of stakeholders which is crucial for an effective participatory approach. The inclusion of stakeholders is also one of the conditions of their empowerment. This led to the stakeholders, yearning for new knowledge and experience on the basis of our good practices, to apply for the bilateral exchange with the partner organization from Italy. A successful participatory approach can connect stakeholders for similar future challenges.
4. Discussion

The local population’s active involvement in the organised workshops has shown that the list of officially registered heritage strongly differs from the values, stressed by the residents. This is partially due to the fact that the experts didn’t choose the official heritage from the perspective of developmental potentials, but have done so according to preservation criteria of heritage recognition. On the other hand, the discrepancy between both lists points to two facts, namely the obsolescence of official lists (the registry of the immovable cultural heritage is not updated; the units have mainly been chosen several decades ago) and the gap between the expert and popular recognition of heritage/values. The views of the locals regarding which parts of their local environment deserve special focus often differ from the expert opinion.

Furthermore, within our study and workshops we have come to realize that cultural heritage/values carry different developmental potentials, rarely associated with economic profit during the first stage. In the beginning the locals see the social benefits more important as socialising, establishing and maintaining the intergenerational dialogue, maintaining the local identity or pride and the promotion of their living environment. Lately the concept of empowerment has been gaining importance, especially because it promotes the local initiative and local tourist-service providers, who can establish their own development according to their ideas and pace. The local community is involved in the process of developing and managing tourist products from its own cultural values and is also able to recognize its own benefits within this process (Scheyvens, 1999). Based on our experience, Figure 1 shows the matrix, where the developmental potentials of selected cultural values have been evaluated, showing that a certain value has no potential (-), medium potential (o) or great potential (+). The matrix reference is merely informative, since we are fully aware of the fact that the assessments are subjective and that there is a need for a more accurate and unbiased evaluation methodology.

In addition, merely the developmental potentials of heritage/values are not what it takes for the services and benefits to develop; these potentials also need to be further activated. A simple natural analogy – the presence of landscape structures in a place assures functions and processes that develop into services only if people make use of them. For a person to actually benefit from these services, there are other forms of assets that have to be involved; e.g. pollination represents a service from which we benefit by eating almonds only after we have included human work (Fischer et al., 2009). Similarly the cultural heritage/values are activated with appropriate management which requires human resources. The heritage/values with developmental potentials have to be linked together, and to achieve success it is necessary for the local stakeholders to be actively involved in incorporating the heritage/values into a comprehensive product or service (Šmid Hribar and Ledinek Lozej, 2013). Only the successfully incorporated heritage/values can represent the area’s advantage in development. We agree with Bigaran et al. (2013), who highlight the fact that, in order to achieve success, the stakeholders’ ability to use and enhance local resources is more important than the topic itself.
For the participatory approach it is necessary to involve an important local or regional stakeholder – an institution with a similar interest in developing the area with the intention of resuming the process in the future. The key part of the participatory approach is mutual listening. We agree with Sclavi (2008), who introduces 7 guidelines for the Art of listening. Similar to her conclusions regarding listening, we find that a quality participatory approach takes a certain amount of time.

5. Conclusions

More important than mere values are the people, who can identify and recognize suitable cultural values and key stakeholders incorporate them into a whole and upgrade them into a market product or a service. However, this is a long-term process, extending over several years with interim evaluations that contribute to the improvement or even the formation of completely new products and services.

Based on our experience we can briefly set out the key factors of successful heritage/values management that ensure sustainable results:

- identify the appropriate heritage and other topics connected to it
- identify stakeholders who are interested to develop the heritage and other topics into a product/service
- design it into a proper service
- sell the new service to the users

In this process the participatory approach should be included – from the very beginning to the end – the best results are where the local community is able to manage its own products and services. The workshops represented the beginning of the participatory approach and have established trust among the stakeholders and the basis for future work. The participatory approach has proven to be different than trading, where the sale starts immediately after opening the doors. This is, on the other hand, a slow, long-term process that needs full attention, since it never ends.

Only in this manner we can achieve a truly sustainable management, since the local community takes over the care and all the benefits that accompany a heritage/value. Probably our most important experience to share is that...
the protection of the cultural heritage/values and utilizing its developmental potentials are not two contradictory concepts but rather complementary ones.

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