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POST-EVENT BRIEF //

# The material cultural heritage: operationalisation of diverse research outcomes for policy makers

ESPON 2030 Knowledge development activity // 2023

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The workshop was held in Hofburg, the former principal imperial palace of the Habsburg dynasty. Those who were physically present mounted the century old steps to the 4th floor and assembled in the 'Ahnensaal' (the ancestor room). The room is impressive, but also quite cosy, it was, after all designed as a breakfast room overlooking the imperial park. The hybrid meeting which spanned over two days attracted in total 46 participants from 14 European countries.



*Hofburg's Ahnensaal. Photo credit: BDA*

The event was organised by the ESPON EGTC and the EHHF<sup>1</sup> TF <sup>2</sup> and it was an ESPON 2030 Knowledge development activity. The objective was to initiate a participatory approach in developing practical (management) tools for regional development based on the knowledge generated during the two ESPON projects on Cultural Heritage<sup>3</sup> (CH). The work was structured in 3 thematic actions:

1. Increasing socio-economic and well-being aspects of built cultural heritage in public policies.
2. Improving statistical data collection on cultural heritage.
3. Life cycle extension and re-use of existing (historic) buildings. Environmental indicators.

<sup>1</sup> The European Heritage Heads Forum (EHHF) is an informal, professional and expert network for national heritage heads (built heritage, landscapes and archaeology) of the countries of the European Union, the European Economic Area and the member-states of the Council of Europe.

<sup>2</sup> The Task Force on Economy and Statistics, one of the two committees of the European Heritage Heads Forum. The main aim of the Task Force is to formulate, at the European level, clear indicators on the socioeconomic contribution of immovable cultural heritage.

<sup>3</sup> "The Material Cultural Heritage as a Strategic Territorial Development Resource: Mapping Impacts Through a Set of Common European Socio-economic Indicators (ESPON HERITAGE)" (2018–2019); "Cultural Heritage as a Source of Societal Wellbeing in European Regions (ESPON HERIWELL)" (2020–2022)

## 1. Objectives

The event was organised in the framework of the ESPON 2030 Programme's Thematic Action Plan "[Perspective for all people and places](#)".

The event presented the results of the ESPON HERITAGE and ESPON HERIWELL studies, that are both dedicated to cultural heritage. The target group of this event was EHHF Heads, i.e. (managing directors of national heritage institutions), members of the EHHF Task Force on Economy and Statistics (various cultural heritage practitioners at national/regional level & cultural heritage institutions), and other interested stakeholders dealing with cultural heritage.

The rich set of research outcomes and policy recommendations of the ESPON projects offered the opportunity to discuss ideas, solutions and proposals for the 3 thematic actions:

1. A practical regional development package to assist national and local authorities to develop measures that harvest and increase socio-economic and well-being aspects of built cultural heritage. Which developments would assist a national communication strategy focusing on benefits from using the socioeconomic value of built cultural heritage?
2. Proposals on how to improve statistical data collection on cultural heritage, especially further work on the creation of a satellite statistical account for cultural heritage. Would the meeting participants consent to supporting a submission of a targeted proposals to Eurostat concerning data collection?
3. To explore possible future incorporation of environmental indicators to monitor the (environmental) effects of life cycle extensions and re-use of existing (historic) buildings while adapting them to contemporary uses and demands.

## 2. Conclusions

The presentations from the sessions are available in the [ESPON website](#). The following conclusions can be derived from the discussion.

1. State of play regarding the research on the societal impact of cultural heritage.

ESPON HERITAGE has validated a method to extract figures on the socio-economic impact of the material cultural heritage. ESPON HERIWELL has determined a positive correlation between cultural Heritage and SWB (societal well-being). The Nordic studies confirm this positive correlation between cultural heritage and social wellbeing. The projects have uncovered a high number of case studies that are relevant for other decision makers when developing policies for increasing socio-economic and well-being aspects of built cultural heritage in public policies. The project results achieved, so far, should be more efficiently put to use.

2. Increasing socio-economic and well-being aspects of built cultural heritage in public policies.

The participants agreed that an outreach programme would be beneficial in order to inform regional policy planners, spatial planners, administrators and politicians, etc. on the value of cultural heritage and how to measure it. Whether it is as training, or information transfer is less important. An outreach programme would take some time to develop. The question of the

(preferred) target group was discussed but no agreement achieved. This is not seen as a priority task at the present time.

### 3. Improving statistical data collection on cultural heritage

This topic needs attention immediately. Eurostat is starting up a review of cultural statistics. The participants decided that the ESPON Programme and the EHHF TF shall as soon as possible to open a cooperative dialogue with Eurostat. A satellite account for cultural heritage is supported by all participants. This is both a high priority task and urgent as the Eurostat Task force on cultural statistics has a delivery deadline in December 2024. Both ESPON and the EHHF Task Force will establish a liaison with Eurostat and check in on the ongoing work.

### 4. Life cycle extension and re-use of existing (historic) buildings. Environmental indicators.

The interventions in this session gave interesting examples of the use of environmental indicators at national and regional level. The main challenge here is to develop monitoring indicators that can be applied across the board for all EU MS. This also has to do with which statistics are available from Eurostat. The discussions in plenary demonstrated that all representatives wished to see such indicators included in reporting / monitoring as soon as possible. The task is complex. To come up with proposals, there is need for more preparative work and consultations. But it is 'work on the table'.

## 3. Session 1. ESPON project outcomes

*This plenary-style session provided a general overview of the ESPON HERITAGE and ESPON HERIWELL project outcomes; it also looked at relevant Nordic studies concerning cultural heritage societal impacts. In addition, It was an opportunity to contextualize the ongoing research efforts with the main European policy developments in the cultural heritage field.*

**Zintis Hermansons, ESPON EGTC, Research and Policy Manager, introduced the new ESPON 2030 Programme**

ESPON provides territorial analyses, data and policy advice to 27 European Union countries + 4 partner states (Iceland, Lichtenstein, Norway, Switzerland). ESPON assists public authorities to benchmark their country, region or city, identify new challenges and potentials, and shape successful policies for the future.

ESPON 2030 Programme is thematically organized through Thematic Action Plans (TAPS) (<https://www.espon.eu/espon-2030/taps>). The TAP Perspective for all people and places in principle deals with cultural heritage related research. The research during the ESPON 2030 Programme is delivered through a variety of tools, for instance: study reports, publications, interactive maps and 'dashboards', open datasets, story maps, blogposts, podcast and videos, teritoriALL magazine. The new [ESPON Knowledge Portal](#) will feature interactive content and provide opportunities to explore ESPON research outcomes in more detail. It is planned that soon the Portal will contain some of the outcomes of the cultural heritage research related activities.

Regularly, ESPON organises events to transfer the accumulated knowledge and facilitate interaction and networking. Most prominently, ESPON seminars, which are organized in cooperation with the running presidency of the EU Council and focusing on its thematic priorities.

The following Targeted Analysis and Applied research projects from the ESPON 2020 Programme were relevant for this workshop:

ESPON HERITAGE. Targeted Analysis project “The Material Cultural Heritage as a Strategic Territorial Development Resource: Mapping Impacts Through a Set of Common European Socio-economic Indicators” (2018 – 2019) <https://www.espon.eu/cultural-heritage>

ESPON HERIWELL. Applied research project “Cultural heritage as a source of societal well-being in European regions” (2020 – 2022) <https://www.espon.eu/HERIWELL>

### Terje Nypan, Heritage Harvest, summarized ESPON HERITAGE project outcomes

The ESPON HERITAGE was an ESPON TA project, initiated by the EHHF TF. It was lead by the Norwegian Directorate of Cultural Heritage and Mr. Nypan (at the time Technical Director, Norwegian Directorate of Cultural Heritage), coordinated the project from the stakeholder side.

The project ran during 2018-2019. The project had 3 main indicators to map to quantify the socioeconomic contribution of the material cultural heritage in the 10 ESPON member states that participated. (A): GVA and share of GVA (Gross Value Added), (B): Employment and share of Employment (FTE), and (C): Turnover. It was done for the four main sectors in which the built heritage generates direct or indirect turnover and income:

- construction industry
- tourism
- cultural & creative industries
- real estate

The most important finding is not the socioeconomic figures but that an operational method was validated for socio-economic indicators based on official statistics. This method can be refined. Ideally it should be run bi-annually to update the data and to create time-series. That would be a contribution to delivering timely data to decisionmakers at the regional level.

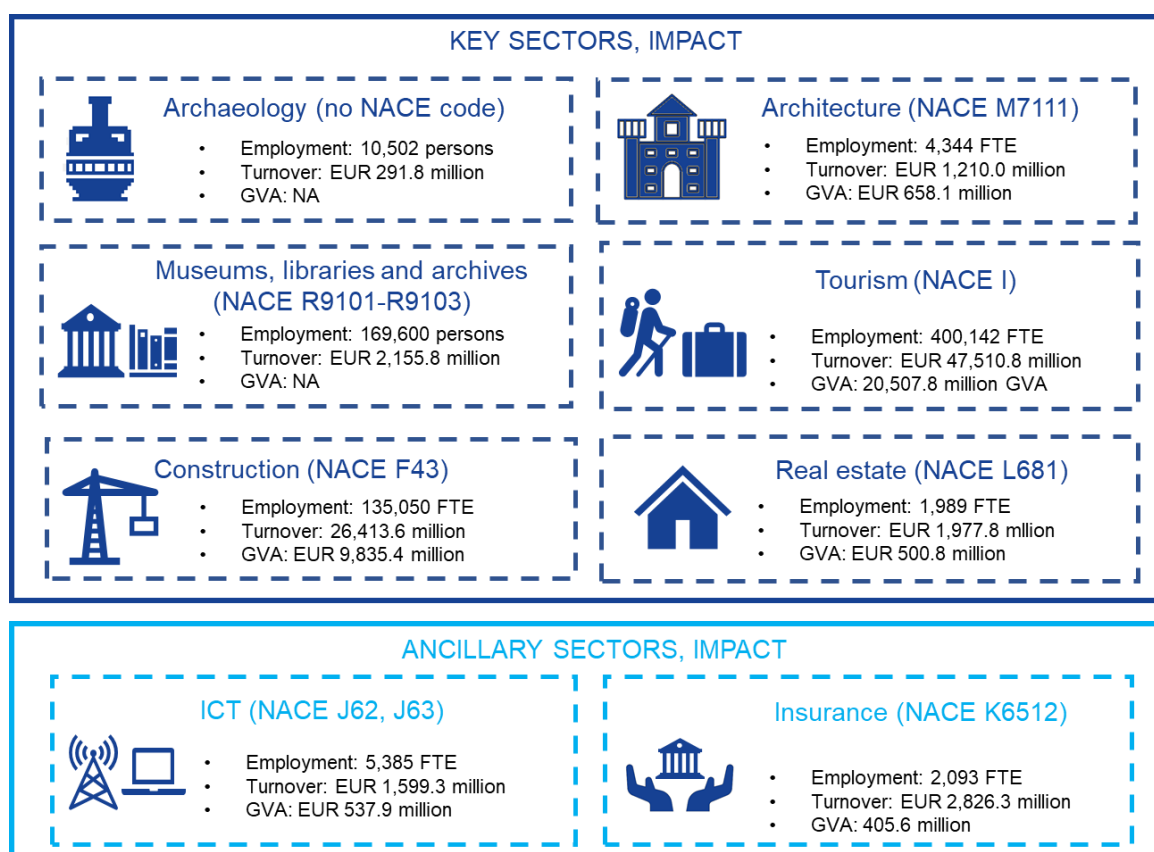
The project findings. Figures.

Employment: 2.1% of the total business economy except financial and insurance activities and 5.0% of the total services economy (NACE codes H-N and S95), similar to the contribution by the entire subsectors of support activities for transportation, cleaning activities or private security activities.

Turnover: 1.0% of the total business economy except financial and insurance activities and 4.0% of the total services economy (NACE codes H-N and S95), similar to contribution by the entire subsectors of support activities for transport, legal and accounting activities or wired telecommunication activities.

GVA: 1.6% of the total business economy except financial and insurance activities and 3.4% of the total services economy (NACE codes H-N and S95), similar to contribution made by the entire subsectors of activities of head offices, engineering activities and related technical consultancy or business and other management consultancy activities.





Share of the impacts related to MCH in the total sector/activity in stakeholder counties/regions, 2016. Source: ESPON HERITAGE

### Manuela Samek Lodovici (IRS) summarized ESPON HERIWELL project outcomes

Manuela Samek Lodovici from the IRS Istituto per la Ricerca Sociale, presented the findings of this recent study. The main objective was to develop a pan-European methodology and territorial analysis of the contribution of cultural heritage to different dimensions of societal well-being. The main challenges were:

*How to develop operational definitions of cultural heritage and societal well-being that are measurable and comparable across countries and over time?*

*How to define, analyse, and measure the relationship between different forms of heritage and the heterogeneity and complexity of its impacts on the different dimensions of societal well-being, which cannot be analysed and measured by resorting to a single and undifferentiated method of analysis?*

Defining cultural heritage as 'Cultural capital' inherited from the past. This definition is based on the definitions provided in the FARO Convention, the EU JPI initiative, the UNESCO classification of cultural heritage, and consultation with CH stakeholders and experts. Well-being is defined to encompass both individual and societal well-being. There are a set of methodological approaches developed to meet these challenges.

Some of the key HERIWELL findings are:

- Heritage contributes positively and transversally to all the considered dimensions of well-being.

- Heritage contributes particularly to improving education and skills; community building (place identity, civic cohesion and sense of belonging; reconciliation of community relationships); jobs, earnings and business development.
- Bi-directional relation between participation in cultural heritage and well-being. Econometric analysis shows that tangible heritage has greater impact on well being in countries/regions with good socio-economic conditions and high participation and engagement in heritage. Population survey and the case studies show that high participation in heritage improves individuals/ communities' well-being and triggers a higher care for CH preservation.

Cultural heritage contribution to material conditions. CH has a positive contribution to the local economy (jobs and earnings): TripAdvisor analysis shows that heritage is positively correlated with the share of employees in cultural and creative sectors on total employment. Similar positive results in correlation analysis can be seen between ERDF investments and local employment rates and in the HERIWELL and ECoC case studies.

Key factors supporting the positive contribution of CH to wellbeing: Preservation, conservation, valorization of cultural heritage; Accessibility of cultural heritage also for vulnerable groups and neglected/peripheral territorial areas; Citizens' active engagement improving sense of ownership and identification with heritage and the recognition of its value for individuals and communities. Open and inclusive heritage narratives.

There is a need to further communicate results but also the many case studies that serve as examples of positive effects on well-being.

### Christin Krohn, Institute of Transport Economics (NO), presented a recent study on well-being in the Nordic countries

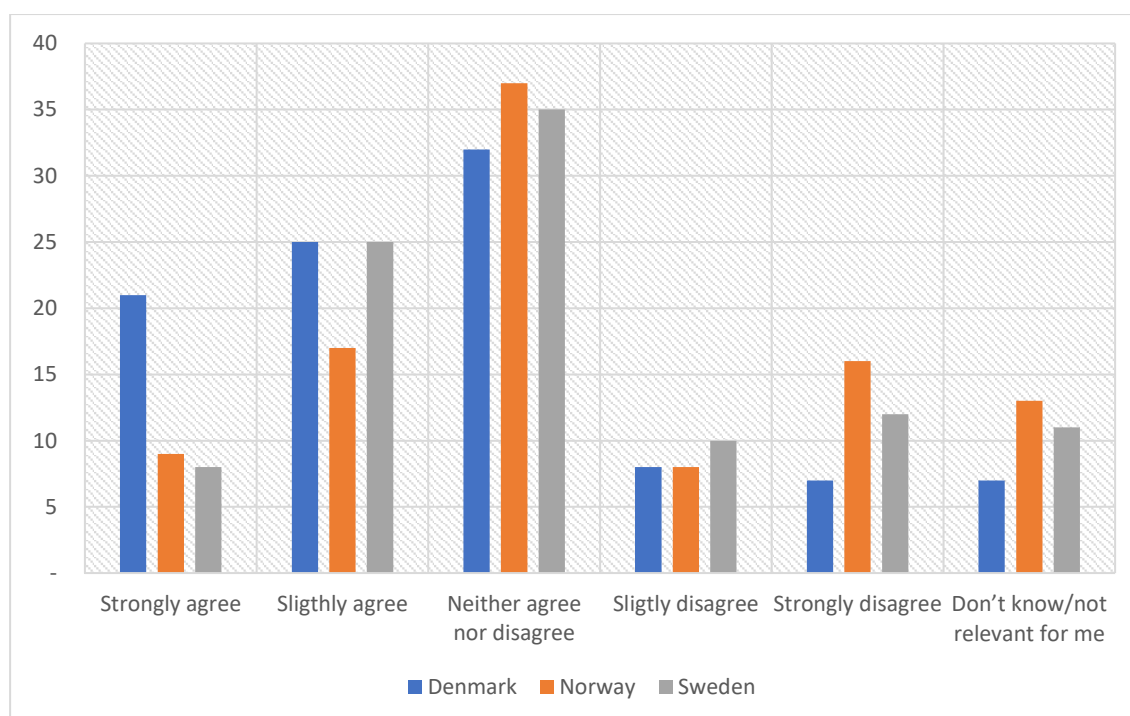
Christin presented a recent study (2023) financed by the Nordic Council of Ministers – “SKUL: Social sustainability in and around cultural environments”<sup>4</sup>. This research focused on collating knowledge on the impact of material cultural heritage (MCH) on social welfare – with an aim to bolster the social dimension of the sustainability goals. Grounded in a literature review on the topic, data was collected and analyzed through a survey and eight case studies in four different Nordic countries/territories: Denmark, Norway, Sweden and Faroe Islands.

The survey, for instance, indicated that the vast majority of respondents were aware of the MCH in their immediate vicinity and were proud of it, even if ‘access to nature’ remains a stronger determinant of where people decided to settle down. In addition, it also examined use of MCH in connection to the Covid-19 pandemic, and analyses highlight that there exists a clear increase in all examined countries, albeit the highest increase in use of MCH was noticed in Denmark.

In general, the research found that there is a need for streamlining the understanding of how MCH are currently functioning for both residents and tourists, their position in the municipal and regional planning, their interlocking with general well-being and their mitigating role in times of crises.

<sup>4</sup> See Online and Offline publication: <https://norden.diva-portal.org/smash/record.jsf?pid=diva2%3A1787902&dsid=-4826>





Cultural monuments/the cultural environment have made it attractive to settle where I live now. Share of respondents (%). Source: SKUL

Pia Sopta, European Commission (DG EAC) presented European Union cultural heritage policy

Introduced the key EU level documents and initiatives. Risk management for CH is a central focus point. Activities of the [EU Work Plan for Culture 2023 - 2026](#) were explained. The financial resources were listed:

- Creative Europe: EUR 2.442 billion in 2021-2027 (63% increase from previous program)
- Horizon Europe: EUR 2.28 billion for research and innovation under Cluster 2 of pillar 2 "Culture, Creativity and Inclusive Society". NEB is a key theme in 2022 and 2023
- Cohesion Funds: EUR 5 billion direct funding planned in 2021-2027 for Culture and CH, including for protecting, developing and promoting cultural heritage assets and services.
- Erasmus+: for mobility, cooperation, partnerships... (i.e. HeritagePRO project on sharing good practices in cultural heritage preservation)
- Recovery and Resilience Facility (RRF): the measures directly supporting culture and the CCSIs amount to more than EUR 10 billion, representing approximately 2% of the total expenditure of the 26 NRRPs endorsed by October 2022. CCSIs will also benefit from a larger pool of measures that have a wider policy focus, such as green construction or digitalization.

## Session 1. Summary

ESPON projects have developed and validated the basis for a method to extract statistical indicators for measuring the socio-economic impact of the MCH. ESPON studies have determined a positive correlation between cultural Heritage and SWB (social well-being). The Nordic studies confirm a positive correlation between cultural heritage and social wellbeing. The statistical figures and study outcomes need to be further communicated and used.

The projects have uncovered a high number of case studies that increase the socio-economic and well-being aspects of built cultural heritage in public policies. The tools and case studies are relevant for a broad range of decision makers.

The new EU policies and frameworks offer increasing budgetary support related to cultural heritage and its valorisation.

## 4. Session 2. Increasing socio-economic and well-being aspects of built cultural heritage in public policies

Gerald Wagenhofer, Wagenhofer GmbH, experiences from EU training and development in Europe

The [European Heritage Academy](#) and [INCREAS](#) were mentioned as examples of running courses. Mr. Wagenhofer emphasised the complexity of building a training programme and to get it certified. It is important to offer the participants a Certificate. Also differences between countries were highlighted as a factor that complicates training development as there is a need for local and regional adjustments. The training material needs to be multilingual which is another complicating factor.

## Session 2. Summary

In a nutshell, the content of any material or activity must contain practical steps to increase socio-economic (and environmental) impacts of cultural heritage

There was no consensus on whether there is need for a training course, an outreach activity or just information transfer events. The structure and format, as well as the aims of such activities, were not clarified sufficiently. However, it was discussed that an outreach activity would be essential, but not critical at this time.

The discussion uncovered a lack of consensus among participants concerning the Target Group. The heritage institutions, competent authorities, urban and regional developers, local and regional administrations (municipalities) and ICOMOS etc. were proposed.

Overall, the workshop participants agreed that some kind of outreach programme would be beneficial. Whether it is a training, or information transfer perhaps is less important.

## 5. Session 3. Improving statistical data collection on cultural heritage

### Christin Krohn, Institute of Transport Economics (NO), Satellite Account for cultural heritage

Important that a cultural Heritage satellite account is separate from Culture Satellite Account. There is a need to move on to a European Heritage Satellite Account, as a general framework is already presented in the ESPON HERITAGE project and elsewhere, for instance in Flanders (<https://oar.onroendergoed.be/item/5158>). The cultural heritage satellite account should be complimentary to National Accounts.

### Ian Kernohan, Historic England (UK), Satellite Account for cultural heritage

Historic England is working on a discussion paper looking at range of measurement options, including Satellite Account approach. In the pipeline there is Seminar/Workshop with key stakeholders like economists, statisticians, and policy staff. Mr. Kernohan highlighted a fact that using current statistical definition on cultural heritage results in having estimates that there are around 10,000 jobs, and a GVA of under £1bn, however, a broader Heritage sector definition used by Historic England estimates there are over 200,000 jobs, and a GVA of under £15bn.

### Andrea Gallelli, Eurostat, EU data on cultural heritage

Eurostat is in the middle of a major revision work. The Task Force on Culture Statistics is working from June 2023 –December 2024. Questions concern the theoretical scope of cultural heritage in culture statistics, available data on cultural heritage, new statistical areas (Satellite Accounts).

There will be NACE revision, a new official structure and codes, new division in the code 91 is being introduced, for instance, with two new groups:

- 91.2 Museum, collection, historical site and monument activities
- 91.3 Conservation, restoration and other support activities for cultural heritage

Alternative data sources will be reviewed - EGMUS, administrative sources, private sector, etc.

### Fabio Bacchini, Associazione per l'economia della cultura, findings of the ESPON HERIWELL project

Highlighted the use of statistics to explore the connection between SWB and Cultural Heritage. Difficulty of defining quantitative indicators of tangible cultural heritage (TCH) endowments comparable across countries and over time.

The Historical building stock is being used as a proxy for TCH and was approximated by the ratio between the number of dwellings built before 1919 and the total number of dwellings. This indicator has already been used as a proxy for tangible cultural heritage (TCH) in the ESPON HERITAGE project.

Main results at the National level:

- Cultural online accessibility and Good health are the main positive drivers of Life Satisfaction, while Poverty risk is the main negative driver.
- TCH shows a positive effect on LS/SWB in the interaction with Public expenditure on culture and Good health (Quality of life).

Main results at the Regional level:

- a positive impact of Participation rate in education (Social cohesion dimension) and a positive impact on SWB of both the Historical building stock as a proxy of TCH and of employment in CCS

### Session 3. Summary

The discussion came to centre much on the ongoing revision work in Eurostat and their Task Force on Culture Statistics. As this work is starting up it is urgent to involve ESPON and the EHHF TF in the work. There is a general agreement to work on developing a Satellite Account for CH. A methodology has been already tested during the ESPON HERITAGE project, but there is a need to refine it.

Given the Eurostat internal process on cultural statistics, which is running, the meeting participants decided to give the Satellite Account development priority over other development issues.

Several topics will likely surface:

- MCH types (typologies) (listed, protected, protection worthy, under PBL?). No common standard?
- Definition of NACE, ISCO, codes. Archaeologists and others.
- Defining shares (proxies for CH in the major social economic sectors) construction, Tourism / Travel, archaeology, architecture, Museums etc., real estate, etc.?
- Eurostat data is based on figures from the national census authorities. What is the situation here, country by country?

Some kind of satellite account for cultural heritage is supported by all participants. This topic needs attention immediately. It was decided to immediately open up a cooperation with Eurostat. ESPON and the EHHF Task Force need to have central roles here. This is both a high priority and urgent task.

## 6. Session 4. Life cycle extension and re-use of existing (historic) buildings. Environmental indicators

Morten Størksen, Norwegian Directorate for Cultural Heritage, Norwegian experience. Effects of upgrading cultural heritage buildings

The climate strategy focuses on improving energy efficiency in buildings. Energy consumption and greenhouse gas emissions are critical environmental indicators. Statistics on heritage building stock and Demolition statistics is being used. Analysis has been carried out of potential regional effect on greenhouse gas emissions of more extensive upgrading and reuse of buildings rather than demolition and new construction. Results of different scenarios were presented, based on a recent study<sup>5</sup>.

To develop relevant cultural heritage indicators that can be applied across the EU is difficult. Differences are large across Europe.

<sup>5</sup> See: [https://innlandetfylke.no/\\_f/p1/i1cde1902-faca-473d-b526-1da35c8a70ef/regional-effekt-pa-utslipp-av-okt-oppgadering-og-gjenbruk\\_241121.pdf](https://innlandetfylke.no/_f/p1/i1cde1902-faca-473d-b526-1da35c8a70ef/regional-effekt-pa-utslipp-av-okt-oppgadering-og-gjenbruk_241121.pdf)

## Adala Leeson, Historic England (UK), Working with statistics and indicators

From a broader perspective, Adala made a case that Heritage has a broad range of values, including environmental values, but these are often excluded in our current economic models and decisions. As the economic research and models evolve, the heritage sector must have a voice in this evolution and we cannot afford to be passive agents. For this reason it is paramount to develop measurement frameworks in order to articulate the social, economic and environmental value of heritage. Adala touched upon some of the ongoing recent research on working with building performance evaluation framework, analyzing indicators and working with big data like UCL 3d Stock Model.

More information on Energy Efficiency in Historic Buildings:

<https://historicengland.org.uk/advice/technical-advice/retrofit-and-energy-efficiency-in-historic-buildings/> , and the relation between heritage and environment:

<https://historicengland.org.uk/research/heritage-counts/heritage-and-environment/> . Overall,

Historic England offers broad range of research on the value of cultural heritage:

<https://historicengland.org.uk/research/heritage-counts/>

## Johanna Leissner (online), Chair of EU OMC group, Strengthening cultural heritage resilience to climate change.

The heritage is under risk due to climate change and there are ways in which to strengthen resilience. The presentation was rich in practical case studies and deserves to be incorporated in a heritage training. Link to the final report: <https://doi.org/10.2766/44688>

## Session 4. Summary.

The interventions in this session gave interesting examples on the use of environmental indicators at national and regional level.

The discussions in plenary demonstrated that all representatives wished to see such indicators included in reporting / monitoring. But this task is also complex. To develop a proposal for environmental indicators needs more preparative work and consultations, with other experts.

The main challenge is developing monitoring indicators that can be applied across the board for all EU MS.

The conclusion at the meeting was that this is 'a task on the table'. But that the 'knowledge basis' is incomplete. Transnational EU environmental indicators for CH indicators is a new field for heritage management.

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#### Disclaimer:

This brief does not necessarily reflect the opinion of the members of the ESPON 2030 Monitoring Committee.