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

Draft findings on the linkages between cultural heritage and societal well-being

Draft Final report // December 2021
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The final version of the report will be published as soon as approved.
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Abbreviations

AT  Austria
BE  Belgium
BG  Bulgaria
CBA Cost and benefit analysis
CCI Cultural and creative industries
CCS Cultural and creative sectors
CH  Cultural Heritage
CoE Council of Europe
CPA Cluster principal component analysis
CY  Cyprus
CZ  Czechia
DCH Digital cultural heritage
DE  Germany
DG EAC Directorate-General for Education and Culture
DK  Denmark
EAFRD European Agricultural and Rural Development Fund
EC  European Commission
ECoC European Capitals of Culture
EE  Estonia
EGMUS European Group on Museum Statistics
ERDF European Regional Development Fund
ESF European Social Fund
ESIF European Structural and Investment Funds
ESPON European Territorial Observatory Network
ESPON ESPON European Grouping of Territorial Cooperation
ETC European Territorial Cooperation
EU  European Union
ES Spain
EU-SILC European Union Statistics on Income and Living Conditions
ETC European Territorial Cooperation
FI  Finland
FR  France
GDP Gross domestic product
GR  Greece
HERIWELL Short name for the ESPON project ‘Cultural Heritage as a Source of Societal Well-being in European Regions’
HR  Croatia
HU  Hungary
ICH Intangible cultural heritage
ICT Information, communication and technology
IE  Ireland
IS  Iceland
IT  Italy
JPI Joint Programming Initiative
LGBTQ Lesbian, gay, bisexual, transgender and questioning (or queer)
LI  Liechtenstein
LT  Lithuania
LU  Luxembourg
LV  Latvia
MANN National Archaeological Museum of Naples
MCH Material cultural heritage
MS  Member States
MT  Malta
NEET Not in education, employment or training
NL  Netherlands
NO  Norway
NUTS  Nomenclature of Territorial Units for Statistics
OECD  Organisation for Economic Co-operation and Development
OP  Operational programme
PL  Poland
PT  Portugal
RO  Romania
SDGs  Sustainable Development Goals
SE  Sweden
SI  Slovenia
SK  Slovakia
SWB  Societal well-being
TCH  Tangible cultural heritage
TO  Thematic objective
ToC  Theory of change
UCH  UNESCO Cultural Heritage
UIS  UNESCO Institute for Statistics
UN  United Nations
UNESCO  United Nations Educational, Scientific and Cultural Organisation
UOE  UNESCO OECD Eurostat
Executive summary

This fourth Interim Report presents the finalised multi-methodological approach, and the main findings on the relation between cultural heritage and different dimensions of societal well-being.

As underlined in the second Interim Report, the proposed analytical framework is based on the conceptual approach and the hypotheses on how cultural heritage impacts on societal well-being developed in the theory of change (ToC). This was presented in the Inception Report and discussed with cultural heritage stakeholders.

The proposed methodological approach relies on a multimethod design that allows us to study the relation between various types of cultural heritage (tangible, intangible and digital cultural heritage) and societal well-being (quality of life, societal cohesion and material conditions). This approach also explores new dimensions of cultural heritage (e.g. contested heritage), and new types of data sources (e.g. big data, administrative data, survey data, national European Structural and Investment Funds databases). These provide examples of ways to use them for the analysis of the relation between cultural heritage and societal well-being that could be expanded or refined in future research work.

This fourth Interim Report integrates the previous reports. The focus is on those parts of the analysis that were to be completed/finalised: the estimations of the relation between tangible heritage and different dimensions of social well-being; the in-depth analysis of the HERIWELL survey results; the analysis of the gender composition of the directors of state museum/collections in some European capitals; and the analysis of the role of EU investment programmes.

The quantitative pan-European analysis: finalised methodology and results

The pan-European model intends to explore the relationship between tangible cultural heritage and societal well-being and quantify it (i.e. attributing a sign and a numerical value) at national and regional levels (NUTS 2). It also exploits the different quality of the available data in the different territorial levels.

The final pan-European model described in Chapter 2 follows the approach presented in the previous HERIWELL Interim Reports, with some significant changes in the regression model used at NUTS 2 level. The changes are due to the non-availability, at NUTS 2, of data on life satisfaction or related proxies. (In a number of countries the regional value reported by Eurostat is a replication of the national value.)

We first explored the relationship among societal well-being indicators at national level. Proxy variables were derived for the societal well-being dimensions relevant for the analysis (i.e. quality of life, social cohesion and material condition). The indicators available at NUTS 2 level were then individuated. According to this multivariate analysis, the indicators lifelong learning and young people not in employment, education or training (NEET) are the SWB indicators ablest to capture the aspects of quality of life, social cohesion and material condition dimensions.

A non-linear regression model was then estimated separately for each selected social well-being indicator. This included, among the explicative variables, heritage/culture indicators: employment in the cultural and creative sector, and the share of dwellings built before 1919. Another variable associated with tangible cultural heritage analysed to determine its effects on societal well-being was the share of European Regional Development Fund (ERDF) allocations on cultural heritage.

Results for both regressions at NUTS 2 level confirm the impact of the heritage/culture indicators on the two considered dimensions of societal well-being (quality of life and societal cohesion approximated by lifelong learning and young people not in employment, education or training indicators). The ratio of employment in the culture and creative (CCS) sector has a statistically significant positive impact on both of the societal well-being proxy variables. The percentage of dwellings built before 1919 appears to be also statistically significant, with the expected positive sign only for the lifelong learning variable (quality of life proxy), while it shows a positive relation with the people not in employment, education or training rate. The share of European Regional Development Fund allocations on cultural heritage shows instead a negative effect on the people not in employment, education or training rate, therefore positively affecting societal cohesion. An increase in this share appears to reduce the rate of young people not in employment, education or training (social cohesion proxy).
In addition, the possibility to use available big data on culture was further investigated besides the evidence presented in the first Interim report (April 2021) on the use of Wikipedia. In this report we explore the potential of using TripAdvisor data as a new source to measure the use of cultural heritage. We started with data at NUTS 2 level for Austria and Italy. Two indicators (Ratio Museums and Ratio Landmarks) have been created from the TripAdvisor data and included as regressors in the non-linear models. Results do not show significant evidence of the effects of these indicators on the two dimensions of societal well-being considered. However, the Ratio Museums appears to positively affect the ratio of the employment in Cultural and Creative Sectors (which also represents an indicator of the direct impacts of heritage valorisation processes). The small set of regions or the nature of these two new indicators compared to the other consolidated indicators may explain these initial results.

Quantitative analysis of the HERIWELL survey results

A survey was undertaken on a sample representative of the population of eight ESPON countries: Belgium, Czechia, Germany, Ireland, Italy, Norway, Poland and Spain. This aimed to analyse the relation between cultural heritage (tangible, intangible and digital) and personal views of individual and societal well-being, with focus on the Covid-19 context.

The questionnaire was based on closed-ended questions (see Annex 4 to the second HERIWELL Interim report), and was conducted using a CAWI between 28 May and 8 June 2021 by YouGov (Germany), in collaboration with its European partner institutes. Overall, 8818 respondents aged 18+ participated in the survey (all addressed in their national language), with a final sample of ca. 1000 individuals for each country, except for Ireland (507) and Germany (2141).

Chapter 3 presents descriptive statistics and the main findings of a multivariate analysis of the survey responses. The multivariate analysis of the socio-demographic characteristics of respondents in explaining the answers, based on different regression models, is included in Annex 2 to the report.

The share of respondents who are interested in cultural heritage is rather high in all the eight considered countries, although the majority are only occasionally or not actively involved. Differences are largely related to the respondents’ level of education, as expected. The highest country differences are found for the share of respondents declaring being not interested/involved, with 31 % of German respondents and 26 % of Norwegians, compared to only 8 % in Italy and Spain. Among the reasons for these differences, may be a less abundant or world-famous heritage infrastructures, and also some ‘historical burdens’ as well as terminological issues.

Among the individual barriers to cultural heritage participation, perceived high costs is the most mentioned (34 % of respondents, particularly in Italy, Spain and Belgium) and, especially in the youngest generation, the lack of time (24 %). The third most selected answer to this question is lack of information (22 %). The lack or limited choice of cultural heritage opportunities in the neighbourhood is especially felt in rural regions of Poland, Spain and Ireland, as indicated by over 20 % of the respondents. In more densely populated countries such as Belgium this answer is less relevant (10 % of respondents). A lack of reception facilities for specific groups of the population (e.g. children, older people) is noted mainly in Spain and Ireland (15 %). The regression analysis reveals that regional variables tend to be more relevant if there is limited supply, no information and lack of ancillary services.

A majority of the respondents in most of the countries registered negative impacts of the pandemic with regard to their heritage-related views or behaviour. The exception is Norway, probably due to heritage sites that are often located in rural areas less affected by the pandemic in this country. Lockdowns and other restrictions figure at the top of these negative effects (for 35 % of all respondents), particularly in those countries that suffered most under Covid-19 (Czech Republic, Spain and Italy). Concerns about potential repercussions for the cultural sector at large are the second most mentioned answer (26 % of the respondents). Restricted possibilities for social interaction and human communication were felt negatively by 16 % of the respondents. Interestingly, some of the respondents also registered an increased motivation to engage more in heritage-related activities. About 20 % – and 30 % in Ireland and Italy – want to see more of the national/regional cultural resources once the pandemic is over. For 13 %, this desire extends to heritage sites in other European countries. Volunteering and other practical forms of engagement are planned by over 10 % of the respondents in Ireland, Italy, Spain and Poland.

Again, the level of education appears a relevant variable in explaining awareness of both positive expectations and negative impacts of Covid-19, while being a woman has different effects across the
countries. It increases the probability of having negative feelings in Germany and the Czech Republic, while in Italy, women seem to have more positive hopes for cultural heritage experiences in the future.

Almost 34% of the respondents – in some countries nearly 50% (Norway, Germany) – report no relevant change towards the use of the internet and social media during Covid times, with regard to cultural heritage-related information. While some respondents viewed the new media as a real alternative or inspiration during the pandemic, others are still sceptical or prefer to experience ‘real’ cultural heritage artefacts, sites or traditions.

Concerning the perceptions of cultural heritage as a source of societal well-being, the survey results show high shares of positive answers, ranging between 80% and 90% as top values. Only respondents from Germany and Norway are slightly less enthusiastic, but still with very positive answers in the range of 60% to 75%. There is also an alignment between the perception of cultural heritage as a source of material well-being, an enhanced individual quality of life and societal cohesion. Respondents from some countries consider the potential of cultural heritage to contribute to the economy and to contemporary creation as very strong (e.g. Italy, Spain, Poland or in the Czech Republic). These are also the ones that perceive a more important contribution of cultural heritage to individual and social development. The figures may help to inform political debates about the funding of heritage development plans and institutions at local, regional and national levels. There are however divergent opinions about the impacts of ‘over-tourism’ or other negative influences derived from cultural heritage or related tourism that could worsen the quality of life of residents.

The multivariate analysis (presented in Annex 2) shows a number of more specific insights, for example the perceived role of cultural heritage as an inclusive or non-inclusive driver of societal cohesion. Especially regarding the integration of migrants and other minorities, it shows that a higher level of education increases positive views, e.g. in Belgium, Germany, Ireland, Italy and Spain. Women are likely to support these views more often in Germany, Poland and Spain, while they disagree more often in Italy and Norway. In Poland, respondents who are unemployed or out of the labour force (e.g. due to disability) are more likely to disagree. Contrary to what may be expected, older people tend to agree more often than younger ones in Italy, Norway and Poland. As regards regional differences, it may be assumed that living in capitals or larger metropolitan districts can foster a positive position, as exemplified by Brussels (Belgium).

**The contribution of cultural heritage to gender equality in a sample of countries**

An analysis on the gender composition of directors of state museums/collection in European capital cities was carried out in the second interim report. To complete this, the analysis in Chapter 4 covers an additional three capital cities with at least 12 state (financed) museums/collections and four capitals with fewer such institutions.

The gender distribution among directors of state-funded cultural museums or collections in 2003 and 2021 (Berlin, Copenhagen, Lisbon, London, Madrid, Rome, Stockholm, Vienna and Warsaw) shows that the overall share of female directors grew from 36.7% in 2003 to 47.8% in 2021. A closer look shows an uneven development of the most prestigious (and usually well-paid) director’s positions. There has been obvious progress in a gender-balanced staffing policy of these museums during the last two decades. However, only two of the nine highlighted cities (Vienna and Stockholm) reach the envisaged rate of above 50% female museum directors that would correspond to the share of graduates in related university subjects.

The four additional capitals, where the quorum of 12 museums/collections has not been met (Athens, Riga, Tallinn and Vilnius), show higher shares of female directions in both years (59% in 2003 and 67% in 2021).

When comparing the gender gap in top management in the selected museums with that in other sectors, it can be noted that the heritage sector is on par with senior positions in national administrations. It performs better than other sectors (e.g. public broadcasters, national parliaments in EU MS, private companies).

**The contribution of EU investments in cultural heritage to societal well-being in the 2014-2020 programming period**

Various EU and international investments (e.g. European Structural and Investment Funds including European Territorial Cooperation, H2020, Creative Europe and EEA) sustain cultural heritage. The qualitative-quantitative analysis of the characteristics and the effects of European investments in cultural heritage on societal well-being focuses on three main programmes: European Structural and Investment Funds (ESIF), Creative Europe, and the European Capitals of Culture programme. The analysis has considered both EU
data sources and national data sources (i.e. national databases on European Structural and Investment Funds, interviews with European Capitals of Culture representatives). The analysis shows that the European Structural and Investment Funds, and particularly the European Regional and Development Fund (ERDF), are the main direct source of EU funding for cultural heritage. According to EU data, 3.1% of the overall planned European Regional and Development Funds are allocated to culture, of which 79% are dedicated to cultural heritage. National data sources report higher allocations to heritage, reaching 10.3% of the overall planned European Regional and Development Fund allocations. This difference may be explained by a classification of the interventions under codes different from the cultural heritage ones. The correlation analysis points to the existence of a relationship between European Regional and Development Fund and European Social Fund investments in cultural heritage and the three considered dimensions of societal well-being. The regression analysis performed within the pan-European analysis also reveals a causal relationship between ERDF investments in cultural heritage and societal cohesion (people not in employment, education or training rate). The relationship between cultural heritage and the previously mentioned dimensions of societal well-being is also confirmed for European Capitals of Culture funds.

**Societal well-being and cultural heritage in European Structural and Investment Funds**

European Regional Development Fund allocations in culture resulting from the Open Cohesion database reached about EUR 6.7 billion of ERDF funds (equivalent to 3.1% of total allocated European Regional Development Fund) in the 2014–2020 programming period. The largest part of these funds (79%) is allocated to cultural heritage: about EUR 4.8 billion under the specific investment field 94 – Protection, development and promotion of public cultural and heritage assets. This is 72% of the total planned cultural heritage allocations of the European Regional Development Fund. EUR 485 million (7%) has been allocated under the intervention field 95 – Development and promotion of public cultural and heritage services. An additional EUR 69.4 million has been allocated to the intervention field related to cultural heritage under the Instrument for the Instrument for Pre-accession Assistance (IPA) fund for territorial cooperation.

The analysis of the national databases shows that in most countries (excluding Cyprus, Hungary, Ireland and Portugal), the sum (at national level) of European Regional and Development Fund allocations on projects involving cultural heritage is greater than what is registered in the Open Cohesion database under the 94 and 95 categories. Overall, 5494 projects related to cultural heritage have been financed under the European Regional Development Fund (excluding European Territorial Cooperation projects) in the 2014–2020 programming period for a total amount of EUR 21 billion. This is equivalent to 10.3% of the total planned allocations.

European Territorial Cooperation programmes (including interregional, cross-border and transnational programmes) also show a relatively high amount of cultural heritage allocations and projects. Using the information available in the keep.eu portal on partners’ localisation, it has been possible to collate the budget data at regional (NUTS 2) level. Overall, 1085 projects in cultural heritage have been selected on the basis of keywords, for a ‘Total eligible budget/expenditure’ of EUR 1.144 million in the 2014–2020 programming period. The ESPON countries involved in the selected heritage projects are the EU27 Member States, the UK, the four European Free Trade Association (EFTA) countries, the five Western Balkans countries and Turkey. The analysis shows that overall, 264 regions (at NUTS 2 level) have been involved. The European Regional Development Fund allocations for European Territorial Cooperation projects in cultural heritage involve 224 regions (NUTS 2 level) with a total of EUR 779 million in the 2014–2020 programming period.

European Social Fund projects and allocations in cultural heritage are much lower. The analysis of national databases by country experts using keywords shows that 496 cultural heritage projects have been financed by the European Social Fund in the 2014–2020 programming period. The total amount is relatively low at EUR 339 million, equivalent to 0.4% of the total planned allocations for this fund.

The analysis of cultural heritage-related projects funded by the European Agricultural Fund for Rural Development has been conducted using the database available on the European Network for Rural Development online portal. According to these data, the fund has financed projects in the field of cultural heritage in 19 countries, for a total amount of EUR 8.03 million. The countries with the largest allocations are Ireland, Italy and Slovakia.

A correlation analysis has been carried out considering the updated total planned European Regional Development Fund allocations in cultural heritage for the period 2014–2020. This has resulted from Open Cohesion data and a subset of the societal well-being indicators available at regional level.
Despite a low level of correlation, the correlation signs show the expected positive relationship between cultural heritage allocations and most of the societal well-being indicators. European Regional Development Fund allocations in cultural heritage are positively correlated with quality of life indicators and with some societal cohesion indicators (freedom over life choices, job opportunities, making friends and volunteering). A positive correlation also emerges with the quality of institutions. A higher incidence of European Regional Development Fund allocations in cultural heritage is also associated with lower poverty risks, severe deprivation and inequality (measured by the youth not in employment, education or training rate and the gender employment gap), which can be interpreted as a positive effect for societal cohesion. Regarding material conditions, results show a positive correlation between European Regional Development Fund allocations in cultural heritage and the employment rate. Similar results are confirmed in correlations carried out for the European Social Fund, European Territorial Cooperation and the sum of all European Structural and Investment funds.

Creative Europe investments in cultural heritage

Creative Europe provides specific funding to cultural and creative industries, including cultural heritage. Even though this is a secondary source of funding for cultural heritage, it includes actions and regular funding targeted to cultural heritage, and fosters societal well-being outcomes. As the publicly available data on Creative Europe do not include a classification of cultural heritage projects, a keyword search has been performed. Out of the 1189 projects emerging from the keyword search, 224 focused on cultural heritage (see the second interim report). Half of them focus on tangible heritage, while the remaining half is equally divided into intangible and mixed heritage projects. France (36 projects), Belgium (29), Italy (28) and Germany (26) are the countries which coordinated the highest number of the projects associated with cultural heritage. Except for Italy, these countries are also those in which the project coordinators were expected to receive the highest amount of financing.

The qualitative analysis of the selected projects shows that 64% have potential linkages with societal cohesion, 57% with quality of life and 30% with material conditions.

European Capitals of Culture interventions in cultural heritage

The analysis of the European Capitals of Culture Initiative (ECoC) is focused on understanding potential linkages between cultural heritage and societal well-being at local level in the period 2014–2020. As the ECoC includes both cultural heritage and general cultural features, an initial selection of those cities has been made where specific use of cultural heritage in their investment programme has been made. Eight European Capitals of Culture (Matera 2019, Mons 2015, Paphos 2017, Plovdiv 2019, Riga 2014, Umeå 2014, Valletta 2018, Wrocław 2016) have been selected for an in-depth analysis based on ECoC evaluation reports and studies and on interviews with local representatives. The lack of common impact indicators and the scarcity of specific data on cultural heritage in ECoC evaluations limits the analysis. Therefore, our conclusions on the linkages between cultural heritage and societal well-being have to be interpreted in the wider context of cultural interventions.

Most of the mapped heritage interventions focused on tangible cultural heritage, while only two capitals focused specifically on intangible heritage (Umeå 2014 and Paphos 2017). In many cases, interventions focused on: the renovation of tangible heritage sites, on the revival of unknown or neglected heritage (e.g. valorisation of industrial heritage in Wrocław); the improvement of old or the creation of new heritage sites (e.g. the MUZA museum in Valletta); on the use of heritage sites for cultural activities; and the valorisation of intangible heritage through specific narratives and events. Interventions also improved the accessibility to cultural heritage, in particular for disadvantaged groups, through free access to the European Capitals of Culture activities and the use of different communication channels (e.g. in Riga and Plovdiv). The decentralisation of cultural and heritage activities (e.g. in Wrocław and Riga) and through making cultural and heritage activities more interesting with entertainment (e.g. in Plovdiv) also helped. Another relevant result regards increased participation of citizens in cultural heritage and cultural activities both as audience (e.g. in Valletta) and co-creators and/or (more often) co-producers (e.g. in Riga and Umeå). However, only in a limited number of projects (9 out of 83), has co-creation really questioned power relations in society, opening the space for what could be a democratisation of culture.

The meta-assessments of the selected capitals should be interpreted with caution due to the above-mentioned data constraints. They show potentially positive linkages between cultural heritage and all three dimensions of societal well-being (i.e. quality of life, societal cohesion and material conditions) in all the eight capitals. However, some negative relations with societal well-being are also detected.
A particularly relevant relation seems to exist between cultural heritage and, more generally in culture, and societal cohesion in all capitals for almost all sub-dimensions (except for trust, where this relation has been detected only in Riga, and for Matera in the case of social inclusion). The valorisation of cultural heritage for societal cohesion purposes is however not free of conflicts, as pointed out by the Umeå case.

Heritage seems to also have a significant relation with material conditions, confirming the extensive literature on this positive relation. Heritage has been particularly useful for enhancing the territorial attractiveness of all the analysed capitals, while its contribution to growth and jobs seems to be registered in five out of the eight analysed cities. However, the valorisation of heritage for economic development purposes is ambivalent, as in the absence of a sustainability-led strategy it may create negative effects for residents. This can include an increase in housing prices and a shortage of housing as in Valetta and Matera, or concerns over the ‘faking’ of the identity of a territory as in Umeå and Matera.

Concerning quality of life, while all the sub-dimensions seem to be potentially impacted by heritage, the intensity of the impact seems to vary extensively. In all the eight selected capitals, heritage has a relevant relation in particular with education and skills, including digitalisation and digital skills. It is also linked with contentment and ‘happiness’ effects, while the relation with the other quality of life sub-dimensions seems to be weaker.

The meta-assessment also points out a series of factors that condition the effectiveness of cultural heritage strategies: continuous funding and equality in access to it; decentralisation of cultural initiatives and use of innovative cultural resources; citizens’ engagement not only as passive users, but also as co-creators and co-producers of cultural activities; adoption of long-term and integrated and participatory strategies.

Preliminary policy indications

Based on the analyses undertaken up to now, some preliminary policy indications are provided in Chapter 6 for policymaking. These cover various territorial levels (EU, national/regional, local) that integrate the recommendations on data sources and indicators provided in the second interim report. In the final HERIWELL report, the policy recommendations will be further integrated and fine-tuned based on the results of the case studies.

Policymaking at all territorial levels should acknowledge the value of cultural heritage not only as an economic well-being driver, but also as a driver for societal well-being. Hence, the heritage dimension should be included in all social and development policies such as education, regional development, welfare, environmental and mobility policies. This implies ensuring a multilevel governance of heritage policies, adopting a collaborative approach to policymaking and paying attention to what and whose heritage is valued. Furthermore, it requires the allocation of specific and adequate long-term funding to cultural heritage and its integration with other funding sources. The HERIWELL analyses also point out that specific actions should be taken to harness the potential of digital tools to strengthen accessibility of cultural heritage and enhance its societal well-being contribution.

To potentiate the valorisation of cultural heritage as a societal well-being driver, policymaking at all levels should focus on building the capacities of public institutions and stakeholders in the heritage and other societal well-being fields. The focus should be on strengthening the capacities of public institutions to adopt collaborative processes, and on the other hand to empowering stakeholders, including citizens, to actively participate in them. Furthermore, policymakers should increase information on heritage opportunities and improve the accessibility and inclusivity of the heritage sector. HERIWELL analyses have pointed out that cultural heritage may also have negative effects. Therefore, national/regional and local policymaking should also focus on enhancing the social and environmental sustainability of the heritage sector, and using heritage as a tool for improving capacities on sustainability to mitigate/prevent this.

At local level, policymaking should focus on concentrating cultural heritage strategies on specific and clear societal well-being objectives and combining various types of heritage forms to achieve them. Moreover, local policymaking should decentralise opportunities to engage with cultural heritage through, for instance, the valorisation of cultural heritage in disadvantaged areas. Other possibilities include increasing cultural heritage resources in peripheries, inner areas, rural areas and similar, with the involvement of local actors. As cultural heritage has an enormous potential to ensure the revival of urban, rural and inner areas, policymakers should build cultural heritage-led local development strategies, involving local citizens and actors.
Introduction

This fourth interim report integrates the previous reports, with the finalised methodology and the main findings on those parts that were to be completed or extended, following also a workshop with CH experts on the pan-European methodology, held on 7 September 2021, and a workshop with CH stakeholders on the HERIWELL survey to population, held on 4 October 2021.

The report is structured along six chapters. Chapter 1 provides a synthesis of the overall methodological approach. Chapter 2 presents the finalised pan-European quantitative analysis, and Chapter 3 the quantitative analysis of the survey results. Chapter 4 is the analysis of the development of the gender composition of directors of state museums in a sample of city capitals. Chapter 5 shows the finalised analysis of the contribution of selected EU programmes to cultural heritage (CH) and to social well-being (SWB). Finally, Chapter 6 provides some preliminary policy indications, based on the evidence and findings of the research activities carried out so far.

The annexes completing the report include the detailed methodology and results of: the pan-European quantitative analysis (Annex 1, Chapter 1.1); the survey results, with the regression results (Annex 2); details of the gender composition of state-funded management positions (Annex 1, Chapter 1.2); the analysis of EU programmes supporting investments in CH (Annex 3); the completed Mann case study and the selected case studies that will be included in the final report (Annex 4). For completeness, we also include in Annex 1 (Chapter 1.3) the methodology and main findings of the analysis of intangible heritage carried out in the second interim report.
1 Linkages between cultural heritage and societal well-being: methodological approach

The proposed methodological framework moves from the conceptual approach and the hypotheses on how cultural heritage may impact on societal well-being developed in the theory of change (ToC). This was presented in the inception report, and discussed with cultural heritage stakeholders in a deliberative event between December 2020 and January 2021 (see Annex 9 to the HERIWELL interim report for further details).

As illustrated in the figure below, the methodological approach relies on a multimethod design that allow us to consider various typologies of cultural heritage (tangible, intangible and digital cultural heritage), and the SWB dimensions considered in the ToC (quality of life, societal cohesion, material conditions). The proposed multimethod approach also explores new dimensions of CH (e.g. contested heritage) and new types of available data, such as big data (Wikipedia and TripAdvisor data in the pan-European quantitative analysis), administrative data (the International Directory of Arts and the UNESCO list of intangible heritage), ad hoc survey data and data on ESIF derived from the analysis of national ESIF datasets.

Figure 1.1 The HERIWELL multimethodological design in summary
In synthesis, three main levels of analysis have been considered.

1. **Global assessment** aims to unveil and explain linkages between all forms of CH and of SWB at the pan-European regional level. The global assessment is based on quantitative and qualitative methodologies involving the use of available information and data (including survey data, big data, and administrative data) as well as fieldwork.

   - **Quantitative methodologies** include multivariate statistical and econometric analyses of the relation between tangible cultural heritage (TCH) and the quality of life and societal cohesion dimensions of SWB. This is based on ESPON countries at national and regional level using available comparable indicators, and testing the possibility to use big data (e.g. TripAdvisor and/or Wikipedia data). Different methodologies and data were considered and tested in the previous reports, each one with potentialities and drawbacks. The methodology presented in Chapter 2
and Annex 1 is considered the most effective for the study. This was discussed in the methodological workshop of 7 September with experts for validation.

- Fieldwork and quasi-quantitative methodologies are used to analyse survey results and a cross-country population survey in eight European countries (Belgium, Czechia, Germany, Ireland, Italy, Norway, Poland and Spain) was carried out. This identifies individual perceptions on the relation between CH and individual and societal well-being and the barriers and changes in the use of cultural heritage during the Covid-19 pandemic. The main findings of the survey are presented in Chapter 3 and Annex 2. In addition, a targeted survey is being launched among the HERIWELL country experts and other experts and stakeholders to provide an initial mapping of contested or neglected heritage. This will include perceived effects on social well-being in the ESPON countries, an aspect of cultural heritage with little consideration until now, and with no available data. The result of the mapping will be presented in the final report of February 2022.

- Qualitative methodologies are used to analyse the relation between CH in its various forms and SWB. These methodologies are meant as examples of the type of qualitative and mixed analyses that can be carried out using collected ad hoc data and evaluated information. Different qualitative approaches have been tested focusing on: i) the relation between intangible CH and SWB, using a content analysis of the UNESCO lists of intangible CH (see the main results in the second Interim Report and in Annex 1, Section 1.3), and ii) a descriptive analysis of the development in the gender composition of the directors of state cultural museums/collections between 2003 and 2021 in some capital cities (presented in Chapter 4 and Annex 1, Section 1.2).

2. Local assessment aims to further detail the analysis. It points out not only the linkages between the various forms of cultural heritage and the different dimensions of SWB, but also how and why these linkages occur and who benefits most from them. The methodology is based on eight extrapolative case studies, involving quasi-quantitative methodologies based on desk and statistical analysis of available documents and data (including big data whenever possible) and fieldwork (interviews, workshops, focus groups, etc.). The Mann pilot case study has been completed and is available in Annex 4, together with the list of selected case studies and case study methodology. The results of the case studies will be presented in the final report due in February 2022.

3. There is an assessment of EU investments in cultural heritage in the programming period 2014–2020, and the relation between EU-supported investments in CH and SWB. The analysis is based on a mixed quantitative (i.e. descriptive statistical analysis, correlation analysis, econometric analysis) and qualitative approach (i.e. content analysis, semi-structured interviews, workshops). It analyses cultural heritage investments in ESIF (i.e. ERDF, including ETC programmes, ESF, EARDF) and EU programmes (Creative Europe and European Capitals of Culture) and their linkages with the different SWB dimensions.

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

i. The development of a measurable and comparable operational definition of cultural heritage encompassing all its dimensions – tangible, intangible and digital heritage – and i) commonly accepted by stakeholders; ii) measurable with available data; iii) comparable across countries and over time.

While the quantitative pan-European analysis is focused on tangible heritage, the qualitative and mixed methodologies will rely on a broader definition of cultural heritage, either considering all forms of CH (as in the cross-country survey, the case studies, and the analysis of EU programmes), or specific subsets (as in the content analysis of intangible heritage, the analysis of contested heritage, and the analysis of gender equality in top positions in state museums/collections).
Box 1.1 Defining cultural heritage

CH is to be considered as the ‘cultural capital’, inherited from the past, which people consider as a reflection and expression of their evolving values, beliefs, knowledge and traditions. From this, through the investment of human ingenuity and effort, originates the rich and varied cultures of modern Europe. Cultural heritage includes all elements resulting from the interaction over time between people and places. Cultural heritage is community based and hence heritage communities play a relevant role in its framing. Conservation of this cultural capital is essential, both for its intrinsic value and its potential as an investment from which future development – cultural, social and economic – may be generated.

CH encompasses physical items from the past (tangible cultural heritage – TCH), as well as traditions (intangible cultural heritage – ICH) considered to be of value for societies or specific communities. TCH includes movable objects (e.g. paintings); immovable properties (e.g. architectural works and groups of buildings); cultural landscapes (with strong identity and environmental connotations); sites (e.g. archaeological areas); underwater cultural heritage; industrial heritage. ICH includes traditional skills of craftsmanship, oral traditions, rituals, games and festivities, and traditional performing arts (e.g. folk dance) as well as the instruments, objects, artefacts and cultural spaces associated with them, which communities, groups and even individuals recognise as part of their heritage. Unlike TCH, it gains value and can be protected only if practices – of real people – are still alive, in the participation of communities, professional groups etc. (‘bearers’ of ICH) is a necessity. Indeed, ICH is constantly recreated through the interaction between people and places. If only records of former but now deceased practices exist, e.g. in books or films, the latter could possibly be protected as TCH. More recent categorisations include digital heritage (‘born’ digital or digitised). Moreover, recent debates focus on controversial heritage, i.e. CH characterised by CH-related conflicts, historical burdens or forms of neglect, showing the dynamic and value based nature of heritage.

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

ii. Definition of SWB and description of the structure of the relationship between cultural heritage and societal well-being, which is strongly affected by the specificity of the actions taken and target audience

The SWB definition also takes a broad view, following the literature on the issue. Three macro-dimensions of SWB have been identified on which CH could contribute (i.e. quality of life, societal cohesion and material conditions) that include several sub-dimensions, as described in the HERIWELL ToC reported below.
The use of a multimethod approach sheds light on the various dimensions of societal well-being at different levels (macro – society, and micro – specific groups, individuals) that would be difficult to grasp otherwise. The aggregate quantitative pan-European analysis considers the contribution of TCH to well-being at societal level, measured by proxies based on available indicators, as described in Annex 1. The cross-country survey provides information on individual perceptions on the contribution of cultural heritage (in all its forms) to individual and societal well-being. The extrapolative case studies shed light on micro impacts at territorial level (e.g. community engagement, sense of belonging) that the statistical analyses at the aggregate level cannot capture in detail, and on the mechanisms that support/facilitate this contribution. Extrapolative case studies can also provide information on impacts of cultural heritage that occur jointly (e.g. social inclusion measures adopted by museums can produce both social inclusion and health and happiness of participants), which are more difficult to unveil through the other methods.

In addition, the multimethod design allows us to better understand the bidirectional relation between cultural heritage and societal well-being: i.e. on the one hand the fact that cultural heritage enhancement measures tend to target specific audiences and, on the other hand, the fact that the selected targets must have the capacity to grasp that impulse.

### iii. Interconnected nature of the relation between cultural heritage and the societal well-being dimensions represented in the ToC.

The tangled nature of societal well-being dimensions makes their separate assessment quite difficult. The adoption of a multimethod design allows us to triangulate data from different sources to uncover the CH effects on the SWB sub-dimensions related to quality of life and social cohesion, which were suggested as the focus of the analysis by the stakeholders’ involved in the deliberative event. In contrast, the effects on material conditions were considered less relevant for the HERIWELL project by stakeholders and have been already analysed in many studies.

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1 For further details see on suggested dimensions and sub-dimensions see Chapter 1 of the HERIWELL Interim report and Annex 9 to the HERIWELL Interim report.
2 The relation between tangible CH and societal well-being: a quantitative aggregated pan-European analysis: findings

2.1 Methodology

The pan-European model intends to explore the relationship between tangible cultural heritage and societal well-being. This includes quantifying it (i.e. attributing a sign and a numerical value) at national and regional levels (NUTS 2) and exploiting the different quality of the data in the different territorial levels.

Box 2.1 below summarises the main steps followed for the pan-European quantitative analysis of the relation between cultural heritage (CH) and social well-being (SWB), which will be completed in the final report.

Box 2.1 Methodology adopted: the main steps

| Step 1 | The analysis has initially investigated the relations between CH and SWB at the national level and then at the regional level, according to different subset of indicators. This is to exploit the different quality of the data at the different territorial levels; the consistency and integration among these levels will be finalised in the final report. |
| Step 2 | HERIWELL aims to investigate the way in which CH, through a diversified and ‘indirect relation, determines the impacts (positive or negative) that generate SWB. Searching for these relationships requires a list of indicators able to measure both the concepts of SWB and CH. To individuate the determinants of SWB, the SDGs framework has been mainly used, while SWB has been approximated by the indicator on quality of life available from the EU-SILC source for 2018. CH is approximated using the following indicators: pre-2019 dwellings, ERDF allocations on CH, and employment in cultural and creative industries. A big data source – TripAdvisor – has also been explored, generating new indicators (Ratio Museums and Ratio Landmarks) used as a proxy for CH. In the present version of the report, the use of TripAdvisor has been investigated for Austrian and Italian regions. The final version will also include the evidence on regions for France, Germany, Norway and Spain. The results thus obtained and their possible extension will then be discussed. |
| Step 3 | The relationships between SWB and CH have been explored by using multivariate analyses (cluster and principal component). Based on this approach, a preliminary picture on the relationship amid CH and SWB emerges. |
| Step 4 | Using an iterative approach, which combines the results from the multivariate analysis and a linear regression analysis, the main drivers of SWB have been investigated. Based on this analysis, two indicators (‘lifelong learning’ and ‘young people not in employment, education or training’ (NEET)) were identified as those able to capture differences in the level of quality of life and societal cohesion both at national and regional level. Even if the quality of life is considered as a multidimensional concept, education and NEET are considered in the social research literature as some of the most relevant indicators to approximate it (see Land et al. 2011 for a review). Concerning the methodological approach, the distribution characteristics of the quality of life indicator claims for a different model specification compared to the linear framework. We consider the beta regression model to handle this aspect. |

2 The process is iterative as, through the analysis of the principal components, the preliminary relationship among the indicators is identified and through the linear regression a quantification of this relationship is carried out. The linear regression results could imply a return to multivariate analysis to find other feasible relationships and indicators. At this step, we are mainly interested in identifying the relationship between the most important indicators characterising SWB (quality of life). The estimation of the final determinants of quality of life will be explored through a beta regression analysis.

3 The adoption of the ‘beta regression’ model was considered positively in the HERIWELL Methodological Workshop held on 7 September 2021. This model is used by researchers when indicators assume values in the 0 and 1 interval. More generally, it is used for score indicators as in the case of the available measure for quality of life. Technically, the beta regression uses a link function g (e.g. the logit) that introduces a non-linear regression among the score (e.g. the quality of life) and the identified regressors (the indicators used to measure the phenomenon). The main assumption of beta regression models is that the dependent variable is distributed according to a beta distribution (instead of a normal one).
In line with the literature adopting a 'Beyond-GDP' framework, SWB is characterised by multiple dimensions (social, environmental, cultural and economic). This involves, for example, trust, life satisfaction, cultural dimension, education, skills and material conditions. The availability and comparability of indicators and data on all these dimensions is very different according to the considered territorial level. Therefore, the estimation of the feasible relationship between SWB and CH may produce different results depending on the availability and comparability of data.

The pan-European model at the NUTS 2 level starts from the key indicators identified at national level. The only changes are due to the non-availability, at NUTS 2, of data on life satisfaction or related proxies to be used in the econometric model. In a number of countries, the regional value reported by Eurostat is a replication of the national value.

In the second interim report, the regional regression model was built on the 55 comparable indicators collected for the EU regional Social Progress Index (EU-SPI). These were identified as proxies for the three macro-dimensions of SWB (quality of life, social cohesion and material conditions).

The EU-SPI indicators are collected using three main sources: the Eurostat Regional database and surveys (49.1 % of the indicators), the Gallup World Poll (25.5 %) and EU-SILC (21.8 %). As reported in the metadata description in Annex 1, a NUTS 2 representation is not feasible for all the indicators and countries. All the indicators from the Gallup World Poll are important for the social cohesion dimension of SWB in the metadata for many countries (AT, BE, FR, DE, EL, IT, NL, PL, ES, SE). The main issue here, is these are measured at the NUTS 1 level and attributed as such to the regions.

To overcome these limitations and identify the set of SWB indicators for the econometric cross-section analysis, we explored the characteristics of the indicators using the EU-SPI data. This was done at national level by means of a multivariate analysis, based on cluster and principal components. The results of the multivariate analysis are in line with those obtained using a selection of SDG indicators and presented in the second interim report.

The multivariate analysis allows for the identification of the indicators representing the main drivers of the SWB. These are: lifelong learning, air pollution and access to ICT for the quality of life dimension, and the NEET rate for societal cohesion.

Its mean is related to a set of regressors through a linear predictor with unknown coefficients and a link function. This approach allows us to take into account some data characteristics such as heteroscedasticity or skewness, which are commonly observed for indicators based on rates or proportions.

European Social Progress Index – Regional Policy – European Commission (europa.eu). The use of EU-SPI indicators was criticised during the HERIWELL Methodological Workshop held on 7 September 2021. It was suggested to concentrate attention on the information and the quality of the file resulting from the hoc module of EU-SILC. A new database will be created based on the indicators collected by Eurostat at NUTS 2 level. An updated version of the estimation on quality of life will be added for the final documentation.

In that report the SDGs indicators were applied at national level. In general, the SDGs indicators appear to be a better fit for the Beyond-GDP approach, which has marked important steps in recent years with the release of a consistent framework shared across countries. At NUTS 2 level, the SDGs indicators are still in development and only available for some countries. The SDGs have broader objectives and some indicators are partially overlapping with those of EU-SPI.

The multivariate analysis, the indicators used and the results are illustrated in detail in Annex 1.
To address the interplay between SWB and culture, including heritage, we then estimated two different regressions. One is related to the quality of life, using lifelong learning, and the other to societal cohesion, using young people not in education, employment or training (NEET) as dependent variables. It must be underlined that, according to the multivariate analysis and the evidence illustrated in the second interim report, these two indicators are also able to capture the material conditions dimension. The two SWB indicators\(^7\) have been considered at NUTS 2 level together with the selected indicators for the cultural dimension. These are the employment in the cultural and creative sector (as a flow indicator of CH\(^8\)) and the share of dwellings built before 1919 (as an indicator of CH as a stock indicator). The stock and flow indicators of CH could be defined as a heritage/culture indicator.

Finally, we tested the relevance of the ERDF allocations in the proposed regressions.

As shown analytically in Annex 1, results from the non-linear estimation confirm some interplay between the SWB and cultural heritage.

In addition, new sources of data for CH have been explored, using big data. Besides the exploration of Wikipedia data presented in the Interim Report, here we explore the possibility of using TripAdvisor data at NUTS 2 level for Italy and Austria\(^9\).

New indicators have been defined starting from the number of reviews released by TripAdvisor users about the regional cultural sites visited. The absolute number has been standardised for the population in the area. The analysis shows that this new indicator has not a direct impact on SWB while it interacts with employment in the CCS.

The results illustrated are based on a cross-section analysis and a small subset of regions for the TripAdvisor source. A panel data approach and a richer collection of TripAdvisor data will be the next step.

Section 2.2 below illustrates the data and result of the multivariate analysis on the EU-SPI indicators at national level, Section 2.3 the result of the estimated non-linear model for the interplay of SWB and culture at NUTS 2 level, and Section 2.4 the results when considering also the TripAdvisor data for Austria and Italy.

### 2.2 The results of the multivariate analysis at the national level

The EU regional Social Progress Index (EU-SPI) measures social progress for each EU region as a complement to traditional measures of economic progress. It is the basis for the pan-European quantitative analysis.

The EU-SPI is constructed using only social and environmental indicators to better reflect societal development. It includes 56 comparable indicators available at NUTS 2 identified as proxies for the three macro-dimensions of SWB (quality of life, societal cohesion and material conditions). Most of the sub-dimensions of the general SWB definition are illustrated in the HERIWELL ToC. Up to now, data are available for only two years: one labelled 2016 and the other labelled 2020.

However, the SPI indicators present four main drawbacks for our analysis:

1. Data sources are not related only to Eurostat surveys. In the 2020 version, 25.5 % of the indicators are drawn from Gallup implying a cost for the annual update.
2. Some indicators, such as the trust indicator measured by Gallup, are not defined at NUTS 2 level for many large European countries. They are available at NUTS 1 and repeated for all NUTS 2 regions making the analysis at regional level less significant.
3. Indicators are released only for two different points in time, therefore limiting a panel data analysis even if this approach would be feasible for some indicators.

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7 See Annex 1 for details on all the indicators considered and those selected.

8 A flow indicator, able to identify changes in the TCH demand, is relevant for the panel analysis where the usable stock indicators remain unchanged over time.

9 The difficulties encountered in the georeferencing of data did not allow, at this stage, its application to the Norwegian regions.
To address these issues, we propose a mixed strategy based on two steps. First, we explore the relationship among the EU-SPI indicators at national level to find the SWB key ones (drivers) by means of multivariate analysis (cluster and principal components)\(^\text{10}\). Then we consider those SWB key indicators, available at NUTS 2 level, with indicators of CH (stock and flow) as a regressor. This measures the relationship between heritage/culture and each dimension of SWB in a non-linear regression model. To address the quality of life dimension, *lifelong learning* is considered as the dependent variable; the *NEET* rate is the dependent variable for the regression addressing the societal cohesion dimension.

Considering the 55 SPI indicators at national level, a clear polarisation emerges in SWB, grouping the eastern countries on one side, the northern and the central-southern countries on the other, with significant differences between the latter two groups. The first two principal components, accounting for 57.5% of the total variance, show the following.

- a) Eastern countries (in particular Bulgaria and Romania) are characterised by the lowest environmental (i.e. air pollution) and socio-economic conditions (such as lack of adequate heating) compared to the other country clusters.
- b) Northern countries are mainly characterised by higher education conditions (*Lifelong learning*), access to ICT (internet at home), and quality of institutions.
- c) Southern countries, such as Spain, Cyprus and Italy, are characterised by the worst labour market and education conditions (NEET, lower secondary completion, involuntary part-time workers).

This evidence is in line with that presented in the interim report and based on a subset of SDG indicators\(^\text{11}\). To consider homogeneous and comparable TCH data at NUTS 2 level, the size of CH endowments is approximated by the ratio of the number of dwellings built before 1919 and the total number of dwellings. The indicator on cultural employment is added as an indicator of the economic impacts of the TCH (see the second interim report and its Annex).

The share of dwellings built before 1919 is proposed as a proxy for tangible cultural heritage (TCH) or material cultural heritage (MCH) in the ESPON (2019) HERITAGE study (Final Report)\(^\text{12}\). The other possible indicator to estimate the size of the TCH (or MCH), proposed in the HERITAGE study is the number of objects having heritage value and legally protected in the different countries: the listed heritage. This proxy was excluded for two reasons. The first is that the criteria for inclusion in the listed category changes from country to country. Therefore, the types of heritage objects and the quantities obtained from the different lists are not homogeneous and comparable across countries and regions. The second derives from the data only being available for some countries and regions.

\(^\text{10}\) The cluster and the PC analysis are illustrated in detail in Annex 1

\(^\text{11}\) See also Bacchini et al. 2020, for an application to MIPs indicators.

\(^\text{12}\) In the ESPON Working Paper 2020, ‘Measuring economic impact of cultural heritage at territorial level’, there is an illustration of the Proportion of pre-1919 dwellings in total dwellings, 2011 at NUTS 3 level. The possibility to use this indicator to approximate the CH of the different regions will be analysed in more detail in the final report. Other indicators (TripAdvisor) will be used simultaneously to evaluate the CH endowments for a selected number of countries and regions. Some initial considerations on the possibility to use the ‘pre-1919 dwellings’ indicator to approximate the CH and to measure its impacts on the SWB (on material conditions) can be anticipated (although not analytically) starting from the ESPON Working Paper 2020. The working paper first highlights that ‘there are no complete data on the stock of buildings, their age and types at the European level’ (p. 7). ‘The data show that high proportion of pre-1919 dwellings are concentrated in France, Germany, the United Kingdom and Italy, where the proportion of pre-1919 dwellings varies between 22% and 53% of total dwellings. These countries have an older housing stock and potentially more heritage’ (p. 8). In addition, overlapping Map 3, which reports the ratio of pre-1919 dwellings (p. 8), with Map 2, which illustrates the ‘Density of monuments in European regions, 2006’ (p. 7, ESPON Working Paper 2020), shows that the two distributions at a territorial level do not coincide. ‘Results reveal that the density of monuments on the territory shows an important gap between Germany and Italy on the one hand and other nations on the other hand. The greater density of material cultural heritage on the Italian and German territories is tied to the institutional history of these two countries, and the protection and listing of the heritage assets is more exhaustive in these countries, which can partly explain the regional differences’ (p. 6).
2.3 Results of the estimated interplay between SWB and CH

To explore the relationship at NUTS 2 level between the selected indicators correlated with societal well-being and the selected heritage/culture indicators, beta regression models have been used. As mentioned above, the key SWB indicators selected through the cluster and the principal component analysis are lifelong learning, NEET rate, life expectancy, air pollution (PM2.5), internet access, household disposable income per inhabitant, job opportunities, and employment in technology and knowledge-intensive sectors. Among these indicators, according to the multivariate analysis, the lifelong learning and NEET rates indicators are those most able to capture respectively the quality of life and societal cohesion dimensions of well-being.

In the second step, using a non-linear model we estimated the relation between the heritage/culture indicator and the quality of life dimension of SWB. This used lifelong learning as the dependent variable. The best model selected identifies an interaction with two important dimensions of the quality of life: access to ICT represented by the internet at home variable, and air pollution in terms of PM2.5. The estimated parameters are in line with the results of the multivariate analysis: internet at home has a positive impact on lifelong learning while air pollution has a negative one. This underlines how the quality of life is also characterised by better environmental conditions. Heritage/culture variables appear to contribute in a relevant way to the quality of life. The share of employment in culture and the ratio of dwellings built before 1919 are statistically significant with positive coefficients, therefore showing a positive relationship with the lifelong learning variable. These results underline how heritage/culture might be considered as one of the engines for improving the quality of life.

The non-linear model estimating the relation between heritage/culture indicators and the societal cohesion dimension of SWB, with the NEET rate as a dependent variable, shows that the share of cultural employment is statistically significant (with the expected negative sign on the NEET rate). However, in this specification the ratio of dwellings built before 1919 has a positive sign, which is difficult to explain. This might be due to a higher number of dwellings before 1919 being present in disadvantaged neighbourhoods; on the other hand, this indicator is characterised by reliability problems in some regions.

Summing up, results from the two estimated non-linear regressions confirm an impact of both the heritage/culture indicators on the dimensions of SWB related to quality of life and one of the indicators on social cohesion. The ratio of employment of the CCS has a remarkable positive impact on both dimensions. The percentage of dwellings built before 1919 seems to be statistically significant and with the expected sign only for the quality of life dimension proxied by the lifelong learning variable.

Another regression was conducted based on the consolidated models and the estimated regressors, testing the relevance of the ERDF allocations on CH in the non-linear regressions. The data available are characterised by the presence of small numbers of zero scores for some regions while for other data are expressed only at NUTS 1 level. Bearing in mind these limits, ERDF allocations result statistically significant with the expected negative sign only in the regression with the NEET rate as dependent variable. This shows a positive impact of ERDF allocations in CH on societal cohesion.

2.4 Exploring TripAdvisor data on data on the use of cultural heritage

New data are becoming available from different sources including big data (see Baldacci et al. 2016 for a general presentation of the topic); this phenomenon has partly spread out in the CCS. The HERIWELL project is assessing how big data can be used for estimating the use of CH in the relation between CH and SWB. In the Interim Report an exploration of the Wikipedia data has been provided, monitoring the evolution.

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13 The beta distribution is a suitable model for the random behaviour of percentages and proportions. It is defined by two parameters that control for the shape of the distribution. This approach naturally incorporates features such as heteroscedasticity or skewness, which is the case in the observed dependent variables.

14 Annex 1 presents a description of these indicators.

15 Both indicators have been divided by 100 to obtain a variable between 0 and 1.
of Wikipedia searches in two of the world’s most famous heritage sites: the Colosseum and Pompeii. Below, we present the analysis of TripAdvisor data as a new source to measure the size and demand of CH. This shows the main historic and cultural sites at NUTS 2 level for two countries, Italy and Austria\textsuperscript{16}.

Starting from the TripAdvisor data, two indicators (normalised for the population) were defined as proxy for TCH at the NUTS 2 level, \textit{Ratio Museums} and \textit{Ratio Landmarks}. These indicators have been considered as regressors in the previous non-linear models. That is, by replacing the heritage/culture indicators with those of TripAdvisor in the regressions, with lifelong learning and the NEET ratio as dependent variables. Results do not show significant evidence of the influence of these indicators on the quality of life and societal cohesion SWB dimensions. Many reasons could explain this finding. They could relate to the small set of regions (which may be expanded in the future) or the nature of the new indicators compared to the other consolidated indicators, such as the NEET rate.

A different strategy has therefore been adopted, estimating the impact of the TripAdvisor indicators only on the cultural domain. A linear regression has been tested for the relationship of employment in CCS, TripAdvisor and \textit{lifelong learning}\textsuperscript{17}. The TripAdvisor indicator (\textit{Ratio Museums}) shows a positive relationship with the percentage of cultural employment together with the \textit{lifelong learning}. The positive result obtained seems to confirm that TripAdvisor reviews are mainly expressed by tourists. Therefore, a higher level of reviews indicates a greater tourist demand and therefore a positive impact on sectorial employment.

The new indicator derived from TripAdvisor is related to only a small sample of European regions. However, the positive findings support an extension of the analysis also looking at the details of the information such as textual analysis of the comments available on the sites.

\textsuperscript{16} For each region in Italy (21) and Austria (9) the TripAdvisor list of all the attractions in the region has been considered to obtain the main information: the number of reviews, the ranking in the list of the other things to do in the same area, and the type of attraction according to the TripAdvisor classification. Based on this last information two main classes of attraction were identified: museums and landmarks. Among all the attractions, only the ones with more than one hundred of reviews have been selected so as to calculate the total of reviews grouped by NUTS 2 regions. These values have been normalised dividing them by the population in the region and multiplied by 1000. In such way two indicators, \textit{Ratio Museums} and \textit{Ratio Landmarks}, have been defined.

\textsuperscript{17} As specified in Annex1, the TripAdvisor variable has been related to the two ‘representative’ drivers of the SWB: Lifelong and NEET ratio. Taken together, the two drivers are not statistically significant while they are significant if taken individually.
3 The relation between CH and individual perceptions of well-being: the HERIWELL survey findings

3.1 Background

The HERIWELL survey aims to investigate people’s perceptions on the impact of CH on SWB both in general and in the context of Covid-19 and their attitude on and access to heritage. Some of the questions correspond to those asked in the 2017 Eurobarometer CH survey, which for the final report (February 2022), could enable rough comparisons with ESPON 32 countries not surveyed this time, e.g. as regards the current involvement in CH activities, respective barriers or views on the societal dimensions. The main objectives of the survey are to:

- stratify respondents into ‘consumers’ or ‘active’ CH users and those not interested;
- identify barriers that prevent or discourage the use of CH;
- show the impacts of Covid-19 on people’s view of CH and their future practice once the pandemic has gone;
- identify the impacts of Covid-19 on people’s use of digitised heritage-related content on the internet and in social media;
- identify different views on heritage-related quality of life, societal cohesion and material conditions aspects.

The survey has been carried out in eight European countries (Belgium, Czech Republic, Germany, Ireland, Italy, Norway, Poland and Spain) selected on the basis of: the geographical coverage of all ESPON areas; the coverage of both EU and non-EU countries that are part of the ESPON programmes, the coverage of a large part of the ESPON countries’ population, the representation of different levels of GDP and cultural heritage resources. In addition, the selected countries are those where HERIWELL case studies had been planned and some were considered in the ESPON HERITAGE project.

The questionnaire is based on closed-ended questions (see Annex 4 to the second HERIWELL Interim report). This choice was driven especially by the fact that the survey is submitted online.

To grasp the complexity of the relationship between CH and SWB, the HERIWELL survey adopts the broad definition of both CH and SWB, detailed in the HERIWELL theory of change, to collect people’s perceptions on tangible, intangible and digital cultural heritage as well as on all the dimensions of SWB considered in the project. Furthermore, in one of the questions, the use of ordered categories of the responses in a Likert scale allows us to uncover degrees of opinions of the survey sample on the linkages between cultural heritage and different dimensions of well-being.

The survey has been conducted using a CAWI between 28 May and 8 June 2021 by YouGov (Germany) in collaboration with its European partner institutes. It covers 8818 respondents overall, aged 18+, and all addressed in their national language. This led to a final sample of ca.1000 individuals for each country, except for Ireland (507) and Germany (2141).

In what follows, we present the descriptive statistics and the main findings of a multivariate analysis of the survey responses according to available information on respondents’ characteristics, with focus on: the intensity of engagement with CH; the barriers for not engaging with CH; the perceptions of positive or negative impacts of Covid-19 on the view/use of CH; and the opinions about the impact of CH on different aspects.
dimensions of well-being. For the intensity of engagement, ordered probit models were estimated for each country. The identification of barriers to engagement and the positive or negative mood derived from the impact of Covid-19 on CH are estimated with multinomial logit models. Last, the opinions about the different dimensions in which CH might influence SWB are studied by the estimation of ordered probit models. The multivariate analyses control for: gender, age, level of education, labour status and region of residence of respondents. Because of slight differences in some variables used in the YouGov panels of the participating countries, we recoded the explanatory variables to improve the comparability across countries. The methodology details and the regression results are presented in Annex 2.

In the following tables presenting the results by country, results that are significantly above or below the total average are coloured in green and red, respectively.

In the following tables presenting the results by country, results that are significantly above or below the total average are coloured in green and red respectively.

3.2 Cultural Heritage engagement and participation barriers

Figure 3.1 classifies the answers into four categories of CH involvement, ranging from strong participation to no interest at all. However, because of multiple choice answers, there can be a certain overlap between respondents’ choices. For example, those living in a CH-rich area (in total 17 %) could belong to each of the four categories, i.e. show a strong, casual, less or no CH engagement. Similar overlaps are possible (except for the ‘no’ category) for respondents who point to a media-guided use of CH resources (28 %). The most frequent answers come from respondents who describe themselves as caring for CH but being less involved (41 %) and from those reporting just occasional visits or other forms of participation (31 %).

A particularly interesting group for this survey is composed of respondents identifying themselves as regular users of CH offers (20 %). In this group, differences related to gender, age or occupation are on the whole less relevant than the level of education; as could be expected, a higher educational status clearly contributes to a stronger engagement in CH activities. However, even stronger differences are found when comparing answers across countries, with Spain (32 %) on the upper end and Germany (14 %) on the lower end of the scale.

Among the reasons for a more guarded stance on CH in some countries compared to others could be differences in accessible heritage infrastructures, especially in rural regions. There could also be some ‘historical burdens’ as well as terminological problems. For example, the term and concept of a holistic cultural heritage – *Kulturerbe* – is less firmly rooted in Germany (which does not exclude a strong interest in some of its institutionalised forms, particularly as regards museums and their collections). Such terms, once frequently used during the NS regime and later also in the GDR, gained more ground only during recent decades, mainly in connection with the world heritage sites and conventions of UNESCO.

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20 Ordered probit and multinominal logit models are non-linear models that are estimated using maximum likelihood. They are both probabilistic models and the estimated coefficients are related to the effect that each explanatory variable has on the probability that an individual reports higher values of the dependent variable (as in the case of the degree of engagement: higher intensity). Or, there is more likelihood of choosing an option (as in the selection of barriers to participation or positive or negative moods).

21 The multivariate results presented in the Annex were performed using Stata15.

Figure 3.1 Are you involved, in any way, in the field of cultural heritage?

(Multiple choice; responses in %; N = 8818 respondents; green colour underlines the highest values; red colour underlines the lowest values)

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

% TOTAL (sum of multiple answers) | 165% | 149% | 184% | 148% | 180% | 174% | 155% | 171% | 185%

Source: HERIWELL ad hoc survey 2021 (Field work: YouGov)
Figure 3.2 summarises the answers to the question on barriers to CH participation that also played a role in the 2017 Eurobarometer survey. The figure distinguishes between individual barriers and anticipated institutional or structural deficits. The results of the regression analysis (see Annex 2) show individual barriers featuring strongly, with perceived high costs (34 %) or, especially in the youngest generation, a lack of time (24 %) as the most frequently mentioned barriers. As regards costs, this seems to be of particular concern for respondents from Italy, Spain and Belgium. A regular ticket for the Galleria Uffizi in Florence currently costs EUR 20 (children are free). This could become quite a burden for certain groups of visitors, if compared with entrance prices in other European museums that are not tourist hotspots. However, such costs look relatively affordable if compared with ticket prices for the Italian Seria A football league, which can easily range between EUR 50 and EUR 150. Participating in CH activities is often deeply rooted in social structures and family practices; this suggests, in turn, that people who are deprived from such contacts could be less motivated to participate in heritage activities (16 %). Again, this percentage is – somewhat surprisingly – highest in the youngest group of respondents (25 %) (see the regression analysis in Annex 2 for further details). The group of respondents that confesses to be not interested at all in such activities shows very large variations, with respective answers ranging from 5 % in Spain to 18 % in Belgium. As expected, the education level seems to be the key variable for this answer.

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

The last category in Figure 3.2 includes, for the most part, answers from respondents who do not see important barriers for their participation in heritage-related activities.

The detailed regression analysis of the survey presented in Annex 2 (Chapter 2) reveals again no clear patterns for gender differences. However, due to social norms, previous studies have shown that being a female could raise the probability of facing some barriers such as lack of time due to care and family duties. Regional variables tend to be more relevant for the barriers of limited supply, no information and lack of ancillary services.

**Figure 3.2** Sometimes people find it difficult to access cultural heritage sites or activities. Which of the following, if any, are the main barriers for you?

(Multiple choice; responses in %; N = 8818 respondents; green colour underlines the highest values; red colour underlines the lowest values)

<table>
<thead>
<tr>
<th>Types of barriers</th>
<th>BARRIERS</th>
<th>TOTAL</th>
<th>Belgium</th>
<th>Czech Rep</th>
<th>Germany</th>
<th>Ireland</th>
<th>Italy</th>
<th>Norway</th>
<th>Poland</th>
<th>Spain</th>
</tr>
</thead>
<tbody>
<tr>
<td>INDIVIDUAL BARRIERS</td>
<td>Costs are too high (e.g. high entrance fees, travel to sites)</td>
<td>34%</td>
<td>39%</td>
<td>33%</td>
<td>28%</td>
<td>28%</td>
<td>47%</td>
<td>30%</td>
<td>35%</td>
<td>41%</td>
</tr>
<tr>
<td></td>
<td>I don’t have time</td>
<td>24%</td>
<td>26%</td>
<td>23%</td>
<td>22%</td>
<td>19%</td>
<td>40%</td>
<td>16%</td>
<td>24%</td>
<td>21%</td>
</tr>
<tr>
<td></td>
<td>I have no partner who could join me for such activities</td>
<td>16%</td>
<td>16%</td>
<td>19%</td>
<td>16%</td>
<td>11%</td>
<td>28%</td>
<td>9%</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>I am not interested</td>
<td>12%</td>
<td>18%</td>
<td>6%</td>
<td>17%</td>
<td>9%</td>
<td>6%</td>
<td>17%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>I don’t have enough information about heritage activities I could participate in</td>
<td>22%</td>
<td>26%</td>
<td>25%</td>
<td>17%</td>
<td>27%</td>
<td>16%</td>
<td>23%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>STRUCTURAL OR INSTITUTIONAL BARRIERS</td>
<td>There is a lack of, or limited choice of cultural heritage opportunities in my neighbourhood or region, also because some of this is not accessible</td>
<td>12%</td>
<td>18%</td>
<td>6%</td>
<td>17%</td>
<td>99%</td>
<td>6%</td>
<td>17%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>There is a lack of reception or service facilities (for children, elderly or disabled, etc.)</td>
<td>9%</td>
<td>4%</td>
<td>12%</td>
<td>5%</td>
<td>15%</td>
<td>12%</td>
<td>6%</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>NO OR OTHER BARRIERS</td>
<td>None of the above applies / Other reasons</td>
<td>20%</td>
<td>17%</td>
<td>20%</td>
<td>24%</td>
<td>21%</td>
<td>10%</td>
<td>28%</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>% TOTAL</td>
<td>154%</td>
<td>157%</td>
<td>154%</td>
<td>145%</td>
<td>150%</td>
<td>172%</td>
<td>141%</td>
<td>162%</td>
<td>156%</td>
<td></td>
</tr>
</tbody>
</table>

Source: HERIWELL ad hoc survey 2021 (Field work: YouGov)
3.3 The impact of COVID-19 on direct or virtual heritage engagement

The results shown in Figure 3.3 reveal that a majority of the respondents in most countries – the exception is Norway – registered negative impacts of the pandemic on their heritage-related views or behaviour. Lockdowns and other restrictions figure prominently in these negative effects (for 35 % of all respondents), particularly in those countries that suffered most under Covid-19 (Czech Republic, Spain and Italy). The Norwegian country expert Per Mangset explains what may have contributed to the relatively high rate of respondents in that country (56 %) who did not experience much change, despite strict Covid regulations:

- Norway is a sparsely populated country. Covid-19 infects more easily in densely populated areas. This may also explain why fewer people have been contaminated or died in Norway than in many other countries.
- Many cultural heritage sites in Norway are relatively small and located in rural areas. It has probably been possible to visit them (with a face mask and sanitised hands) despite the pandemic.
- Norwegians visit cultural heritage sites in summer in particular, often in the countryside. Last summer the contamination level in Norway in general was very low. It was relatively high in Oslo, and the most famous heritage sites there were closed down. Foreigners could not visit Norway last summer, and Norwegians had to travel (during holidays) in their own country … visiting cultural heritage sites in the Norwegian countryside.

Concerns about potential repercussions for the cultural sector at large are the second most mentioned answer (26 % of the respondents). Restricted possibilities for social interaction and human communication were felt negatively by 16 %. Daily concerns of survival in pandemic times actually lowered the interest in heritage activities for over 10 % of those interviewed.

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

From the regression analysis (Annex 2, Chapter 2) we can conclude that the awareness of both positive expectations and negative impacts of Covid-19 were more likely to be present for the highly educated (in comparison with the ones holding only a secondary education degree). Regarding gender differences, being a woman increased the probability of having negative feelings about the impact of Covid-19 on heritage and heritage participation in Germany and the Czech Republic. However, in Italy, women seem to have more positive hopes for CH experiences in the future (if post-Covid tourism concepts and facilities would still make such plans feasible).

The pros and cons of a ‘digital turn’ have been widely discussed among CH professionals and policymakers even before Covid-19 gave it more urgency29. The pandemic definitely accelerated this debate29, but – as shown in Figure 3.4 – expectations connected with digitisation and new media still have to face the reality test. The HERIWELL survey results indicate that almost 34 % of the respondents, (nearly 50 % in Norway and Germany), report no relevant change towards the use of the internet and social media during Covid times, with regard to CH-related information. The figure below shows two main perspectives of the answers, which are almost level. These are respondents who found that the new media was a real alternative or inspiration during the pandemic, and others who are still sceptical or prefer to experience ‘real’ CH

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

26 Peter Weibel, Austrian artist and director of ZKM, in an interview published by Museen müssen das bessere Netflix werden, 13 October 2020 (https://www.monopol-magazin.de), demanded: ‘Museums must turn into the better Netflix’
artefacts, sites or traditions. It is possible to conclude that both always need to be considered and further developed in future strategies and actions. They do not exclude each other, but could rather strengthen a contemporary valorisation of CH in line with societal needs.
### Figure 3.3 Since March 2020: How did the Corona pandemic and related restrictive measures impact on your behaviour or views regarding cultural heritage?

(Multiple choice; responses in %; N = 8818 respondents; green colour underlines the highest values; red colour underlines the lowest values)

<table>
<thead>
<tr>
<th>Types of Impact</th>
<th>VIEWS AND BEHAVIOUR during COVID-19</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAD FEELINGS OR GENERAL ANXIETIES</td>
<td>It made me feel sad that, due to the restrictions, many cultural heritage activities were impaired or impossible</td>
<td>35%</td>
</tr>
<tr>
<td></td>
<td>26%</td>
<td>53%</td>
</tr>
<tr>
<td></td>
<td>I worried about the effects on the cultural sector, because I think a diverse arts and heritage sector should be sustained</td>
<td>26%</td>
</tr>
<tr>
<td></td>
<td>27%</td>
<td>25%</td>
</tr>
<tr>
<td></td>
<td>It made me feel lonely, I could not meet up with friends and other people with whom I usually go to visit exhibitions or do CH activities</td>
<td>16%</td>
</tr>
<tr>
<td></td>
<td>16%</td>
<td>21%</td>
</tr>
<tr>
<td>STRONGER INTEREST OR (POST-COVID) ENGAGEMENT</td>
<td>It increased my desire to see the cultural resources of my country and region</td>
<td>20%</td>
</tr>
<tr>
<td></td>
<td>21%</td>
<td>22%</td>
</tr>
<tr>
<td></td>
<td>It increased my desire to make new heritage discoveries in other European countries</td>
<td>13%</td>
</tr>
<tr>
<td></td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>It strengthened my desire to engage more. During the restrictions, I considered engaging more in CH activities, e.g., by donating money, joining a group practising traditional arts or crafts, or by volunteering in a museum</td>
<td>8%</td>
</tr>
<tr>
<td></td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>LESS INTEREST OR ENGAGEMENT</td>
<td>It lowered my interest. Due to the pandemic, survival and other daily or economic concerns become much more important than participating in any cultural heritage activity</td>
<td>13%</td>
</tr>
<tr>
<td></td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>NO CHANGE</td>
<td>No impacts. None of the above applies to me</td>
<td>29%</td>
</tr>
<tr>
<td></td>
<td>30%</td>
<td>17%</td>
</tr>
</tbody>
</table>

% TOTAL (sum of multiple answers) | 160% | 153% | 175% | 149% | 179% | 170% | 129% | 168% | 180%

Source: HERIWELL ad hoc survey 2021 (Field work: YouGov)
Figure 3.4 How did the Corona pandemic and related restrictive measures impact on your use of the internet and social media regarding cultural heritage?

(Multiple choice; responses in %; N = 8818 respondents; green colour underlines the highest values; red colour underlines the lowest values)

<table>
<thead>
<tr>
<th>Impact strength</th>
<th>IMPACT</th>
<th>TOTAL</th>
<th>Belgium</th>
<th>Czech Rep</th>
<th>Germany</th>
<th>Ireland</th>
<th>Italy</th>
<th>Norway</th>
<th>Poland</th>
<th>Spain</th>
</tr>
</thead>
<tbody>
<tr>
<td>STRONG (POSITIVE) IMPACT</td>
<td>I discovered something new, such as heritage places I would like to visit once the pandemic is gone</td>
<td>21%</td>
<td>18%</td>
<td>29%</td>
<td>11%</td>
<td>26%</td>
<td>30%</td>
<td>11%</td>
<td>22%</td>
<td>30%</td>
</tr>
<tr>
<td></td>
<td>Online information enriched my understanding and appreciation of heritage. I plan to continue using the Internet or social media frequently to learn more about heritage objects and practices</td>
<td>19%</td>
<td>17%</td>
<td>21%</td>
<td>15%</td>
<td>20%</td>
<td>23%</td>
<td>12%</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td></td>
<td>My social network life increased: the social networks allowed me to stay in contact with other people interested in cultural heritage — something to build on in the future</td>
<td>18%</td>
<td>13%</td>
<td>23%</td>
<td>13%</td>
<td>8%</td>
<td>25%</td>
<td>14%</td>
<td>19%</td>
<td>26%</td>
</tr>
<tr>
<td></td>
<td>I consulted online heritage information more than usual</td>
<td>17%</td>
<td>15%</td>
<td>21%</td>
<td>10%</td>
<td>12%</td>
<td>21%</td>
<td>10%</td>
<td>25%</td>
<td>21%</td>
</tr>
<tr>
<td>LIMITED — OR PARTLY NEGATIVE — IMPACT</td>
<td>I felt a stronger desire to experience cultural heritage directly, despite the interesting resources or stories available on the Internet</td>
<td>17%</td>
<td>14%</td>
<td>23%</td>
<td>12%</td>
<td>21%</td>
<td>20%</td>
<td>13%</td>
<td>18%</td>
<td>25%</td>
</tr>
<tr>
<td></td>
<td>The available information looks superficial or commercial: Much of what I find on the Internet, e.g. via search engines, seems to be motivated by interests not appropriate for cultural heritage</td>
<td>11%</td>
<td>10%</td>
<td>10%</td>
<td>12%</td>
<td>10%</td>
<td>12%</td>
<td>7%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td></td>
<td>I consulted online heritage information less than usual, as I only use the Internet to get practical information like opening hours, programmes or services that could not be accessed during the pandemic</td>
<td>10%</td>
<td>14%</td>
<td>13%</td>
<td>8%</td>
<td>9%</td>
<td>13%</td>
<td>7%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>NO IMPACT</td>
<td>No impact at all. I don’t use the Internet and social media to get information on cultural heritage or related events</td>
<td>31%</td>
<td>33%</td>
<td>20%</td>
<td>47%</td>
<td>29%</td>
<td>16%</td>
<td>49%</td>
<td>24%</td>
<td>18%</td>
</tr>
</tbody>
</table>

% TOTAL (sum of multiple answers) | 145% | 135% | 161% | 127% | 145% | 161% | 123% | 157% | 169% |

Source: HERIWELL ad hoc survey 2021 (Field work: YouGov)
3.4 Individual perceptions of the role of cultural heritage for societal well-being dimensions

Figure 3.5 presents the share of respondents who totally agree or tend to agree to 11 statements on benefits or problems that are frequently associated with cultural heritage in Europe27. The analysis sheds further light on the varying meanings that cultural heritage holds in different countries, as this is a social construct. The findings of the survey show evidence of its changing meanings and the values that different social groups recognise in those cultural assets.

The analysis of country differences on positive attitudes towards European cultural heritage leads to some interesting insights. As envisaged in the HERIWELL ToC, on the one hand there is an alignment between the perception of CH as a source of material well-being. On the other hand, there is an enhancement of the individual quality of life as well as of social cohesion benefits. Respondents from some countries (Italy, Spain, Poland, Czech Republic) consider the potential of CH to contribute to the economy and to contemporary creation as very strong. The same respondents also perceive a more important contribution of CH to individual and social development. The frequency of positive answers to questions related to those dimensions ranges between 80 % and 90 % as top values. Only respondents from Germany and Norway are slightly less enthusiastic, but still presenting very positive answers in the range of 60 % to 75 % at the other end of the scale.

Statements receiving positive reactions from over 75 % of the respondents are the following.

1. People should be proud of their historical monuments or sites, works of art or traditions (86 %).
2. Cultural heritage is a resource for the development of society or local communities (81 %).
3. Cultural heritage-related activities have an important role for the local economy and for creating jobs (81 %).
4. Cultural heritage is a resource for the personal development of people (77 %).
5. Cultural heritage objects, patterns or practices are a resource for contemporary cultural creation (76 %).

These figures should be considered in political debates about the funding of heritage development plans and institutions on local, regional and national levels.

However, there are other dimensions and perceptions that also deserve our attention and merit further exploration, because they receive affirmative statements in the range of 40 %–60 %. These include divergent opinions about the impacts of ‘over-tourism’ or other negative influences derived from cultural heritage or related tourism that could even downgrade the quality of life of residents (this was the question with the largest variation in the answers). Answers from countries with strong similarities in most of the positive attitudes (Spain and Italy, for instance) suddenly differ a lot when it comes to more negative statements.

The findings of our multivariate analysis (Annex 2, Chapter 2) enable a number of more specific insights. We highlight one important aspect in this report, namely the perceived role of CH as an inclusive or non-inclusive driver of societal cohesion; this especially regards the integration of migrants and other minorities. Some of the findings are summarised below.

I. Positive insights about CH as an element of societal cohesion and integration of migrants:

First of all, a higher level of education increases affirmative views, e.g. in Belgium, Germany, Ireland, Italy and Spain. Women are likely to support this view more often in Germany, Poland and Spain, while they disagree more often in Italy and Norway. In most countries, the occupational status does not play

27 Respondents could indicate whether they fully or partly agree, or disagree with these statements (the negative values can be found in Annex 2).
a significant role for this issue. However, in Poland unemployed or out of the labour force (e.g. due to disability) respondents are more likely to disagree. Contrary to what may be expected, older people tend to agree more often than younger ones in Italy, Norway and Poland. As regards regional differences it could be assumed that living in capitals or larger metropolitan districts can foster an affirmative position, as exemplified by Brussels (Belgium).

II. Considering (some) cultural traditions as an impediment to the integration of migrants

Education works in a similar way as described above with regards to this statement. The higher-educated tend to disagree with the statement more often. Also, women in Italy are likely to disagree with the statement as is the case with respondents in the 75+ age group and those in full time education. Less educated respondents in Spain tend to disagree more often with the negative insights about heritage being an element that may hamper integration. For regional differences, those residing in Wallonia/Belgium (compared to Brussels) are also more prone to dismiss that statement.

This type of analysis will be further developed for the HERIWELL final report. We can already state that only the recognition of existing national specificities, and a broad understanding of cultural heritage and societal well-being, can reveal insights into their more or less positive relationship. A recent study may serve as a general conclusion, in that respect.

‘When specifically considering how cultural heritage can contribute to well-being, one has to recognize that this is a multisided social construct that is valued because of both its intrinsic values and its potential to deliver benefits to individuals and the whole society (commonly known as ‘instrumental’ values). As an extension of the economic approach to natural resources and environmental goods, both use and non-use values are recognized in heritage elements. Use value is derived by the individuals that access those elements and thus enjoy a direct use experience. However, individuals may appreciate heritage on other grounds, as they may derive utility from this cultural capital even if they did not directly enjoy their experiences, by means of option, existence, or bequest values (capturing the possibilities of using it in the future), the intangibles from which the society benefits as a whole, and the possibilities of future generations accessing it, respectively’ 28.

The results of the HERIWELL survey confirm this view as regards the importance of positive use and non-use or intrinsic values of CH, the latter clearly ahead in the poll. Due to the choice of questions and statements, our study adds a new element – that of ambiguous or negative effects. These can impact not only the population at large or specific groups in it, but also heritage objects or traditions themselves.

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Figure 3.5 Do you agree or disagree with the following opinions that are often associated with Europe’s cultural heritage?

(The table focuses on the degree of agreement: totally agree + tend to agree – for negative answers see Annex 2; responses in %; total sample: 8818 survey respondents; green colour underlines the highest values; red colour underlines the lowest values)
### a. Quality of life effects

<table>
<thead>
<tr>
<th>Type of impact</th>
<th>Effects of cultural heritage on quality of life</th>
<th>TOTAL</th>
<th>Belgium</th>
<th>Czech</th>
<th>Denmark</th>
<th>Finland</th>
<th>France</th>
<th>Germany</th>
<th>Italy</th>
<th>Netherlands</th>
<th>Poland</th>
<th>Spain</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>POSITIVE EFFECTS</strong></td>
<td>Cultural heritage is a resource for the personal development of people</td>
<td>77 %</td>
<td>72 %</td>
<td>83 %</td>
<td>72 %</td>
<td>77 %</td>
<td>88 %</td>
<td>66 %</td>
<td>84 %</td>
<td>83 %</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Living close to places rich in cultural heritage can improve people’s quality of life</td>
<td>72 %</td>
<td>67 %</td>
<td>72 %</td>
<td>67 %</td>
<td>75 %</td>
<td>82 %</td>
<td>64 %</td>
<td>77 %</td>
<td>78 %</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>NEGATIVE EFFECTS</strong></td>
<td>Living close to places rich in cultural heritage can downgrade people’s quality of life</td>
<td>49 %</td>
<td>62 %</td>
<td>55 %</td>
<td>50 %</td>
<td>35 %</td>
<td>43 %</td>
<td>50 %</td>
<td>43 %</td>
<td>51 %</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### b. Societal cohesion effects

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

### c. Material and professional conditions

<table>
<thead>
<tr>
<th>Type of impact</th>
<th>Effects of cultural heritage on quality of life</th>
<th>TOTAL</th>
<th>Belgium</th>
<th>Czech</th>
<th>Denmark</th>
<th>Finland</th>
<th>France</th>
<th>Germany</th>
<th>Italy</th>
<th>Netherlands</th>
<th>Poland</th>
<th>Spain</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>POSITIVE EFFECTS</strong></td>
<td>Cultural heritage-related activities have an important role for the local economy and for creating jobs</td>
<td>81 %</td>
<td>79 %</td>
<td>85 %</td>
<td>73 %</td>
<td>83 %</td>
<td>94 %</td>
<td>74 %</td>
<td>83 %</td>
<td>88 %</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cultural heritage objects, patterns or practices are a resource for contemporary cultural renewal</td>
<td>76 %</td>
<td>72 %</td>
<td>79 %</td>
<td>70 %</td>
<td>77 %</td>
<td>85 %</td>
<td>64 %</td>
<td>81 %</td>
<td>83 %</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>NEGATIVE EFFECTS</strong></td>
<td>Areas visited by large numbers of tourists can endanger cultural heritage itself</td>
<td>62 %</td>
<td>66 %</td>
<td>62 %</td>
<td>68 %</td>
<td>59 %</td>
<td>45 %</td>
<td>67 %</td>
<td>51 %</td>
<td>70 %</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: HERIWELL ad hoc survey 2021 (Field work: YouGov)
4 The contribution of cultural heritage to gender equality in a sample of countries: main findings

4.1 Methodology

As shown in Chapter 4 of the HERIWELL Inception Report, the UN Sustainable Development Goals (SDGs) are frequently considered as one of the potential benchmark systems for social well-being (SWB). However, most of the SDG indicators do not connect directly with cultural heritage (CH) which suggests specific analytical methods to determine such links. With this in mind, the HERIWELL team decided to focus on one of the goals with a positive connection to SWB in general. It was also decided to incorporate social inclusion as one of the three SWB impact groups of this study – in particular, achieving gender equality (SDG #5).

The European Union, in its Work Plan for Culture 2019–2022, has also identified actions towards achieving more gender equality as one of its six priority areas of work. This means there is a particular advantage in also focusing on that goal. National and international organisations active in the different fields related to CH have called, over many years, for ensuring gender balance at senior leadership levels and particularly more equitable conditions in the leadership of museums. This is similar to the views of the European Commission, the Council and the European Parliament. The focus on museums reflects that other CH institutions such as archives and libraries are already considered as largely ‘feminised’ in many EU countries, including in senior positions. Even in the field of archaeology, similar trends are predicted in a study carried out in several European countries.

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

Such differences suggest the following research question: can a Europe-wide SWB trend towards an adequate gender balance in the leadership of important museums be empirically verified? Without comprehensive European museums statistics covering this issue it has to be answered with an evaluation of selected local institutions that could be conducted with the available resources. This could possibly inspire further investigations in women’s presence in top management positions of CH institutions as well as in possible consequences for exhibitions or audience development. The same applies to research on the representation of women in museums’ collections, as exemplified in a recent Norwegian study.

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29 cf. e.g. UNESCO (2014), Gender Equality – Heritage and Creativity, p. 135
31 https://ec.europa.eu/culture/policies/selected-themes/gender-equality
32 https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52018XG1221%2801%29
33 https://ec.europa.eu/culture/policies/selected-themes/gender-equality
34 cf. e.g. Ministère de la culture/DEPS (2021), Observatoire de l’égalité entre femmes et hommes dans la culture et la communication 2021. Paris. Similar data are regularly published in the Nordic countries and occasionally elsewhere in Europe.
38 cf. the EGMUS Standard Questionnaire under https://www.egmus.eu/en/questionnaire/
From a methodological viewpoint, the definition of an ‘adequate gender balance’ is crucial: for example, could an ideal benchmark be the 50:50 parity? Or should we instead consider the much higher rate of female students and graduates in specific university subjects, who prepare for senior functions in museums and other heritage institutions? Qualified professionals in museums are usually scientific specialists in their field of work and, in principle, recruited according to their academic and professional merits. There may be different options depending on the type of museum and the aspired position. However, usually graduates in art history, cultural studies, archaeology or other humanities subjects should have good chances of success in applications for positions in institutions with related collections.

The European Institute for Gender Equality (EIGE) calculated, for 2012, that there were 65 % female graduates in the humanities at the EU-28 level. This speaks of ‘women’s persistent over-representation’ in related university subjects over several decades; in some countries this rate goes up to 80 %. A realistic benchmark for an optimal ratio of female leadership positions in museums focusing on the arts and culture should go beyond formal parity, i.e. above the 50 % threshold.

To operationalise this further and to be on a par with existing resources for the study, three additional criteria for the selection of museums or collections sample were developed:

a) Investigations had to focus on public institutions, since the staffing of private museums or galleries does not necessarily obey to policy standards of gender equality or mainstreaming.

b) To consider truly ‘important’ institutions in the sense of the research question, only trends in national responsibility, state-financed museums/collections in selected European capitals are analysed. This focuses on capitals that have a significant number of such museums and collections. To exclude random results, at least 12 of the institutions should be available for comparison in each of the cities highlighted in this report.

c) To fully take into account the above-mentioned qualification profiles for museum staff, only directors of cultural museums or collections in the narrow sense are considered. These include for example cultural history, fine art, music, film, design or crafts, ethnography and archaeology. Therefore, technical, ‘political’ or natural history museums are excluded from this evaluation because of potentially different staffing policies.

As the main source for an evaluation of trends, a benchmark publication has been selected: the International Directory of Arts, 2004 edition. Volume 1 covers institutions from all ESPON countries and provides information about the type of museum or collection, as well as on the lead staff (institutions without staff information were not considered in the evaluation). The data from this source represent the situation in August 2003. In comparison with information collected for the same institutions from official websites in April to July 2021, this covers a period of ca. 18 years – long enough for a trend analysis.

### 4.2 Results of the trend analysis

The following graph provides an overview of the gender distribution among directors of state-funded cultural museums or collections in 2003 and 2021 in Berlin, Copenhagen, Lisbon, London, Madrid, Rome, Stockholm, Vienna and Warsaw (detailed figures can be found in Annex 1, Section 1.2).

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40 https://eige.europa.eu/gender-mainstreaming/policy-areas/education (assessed July 2021). Note: Our exercise aims at highlighting gender trends which is why it makes sense to take earlier data of graduates into account.

41 Source: Eurostat (educ_grad5)

42 In the case of Germany, also 88 public ‘provincial’ museums/collections were analysed. However, their results did not differ significantly from those of the state institutions in Berlin.
**Figure 4.1** Share of women in top management positions in a sample of state-funded museums in nine European capitals with at least twelve of such institutions

Source: HERIWELL elaboration on public data of selected museums

Graph 4.1 shows that the overall share of female directors in the state CH museums of the surveyed capitals grew from 36.7% in 2003 to 47.8% in 2021. A closer look shows an uneven development of the most prestigious (and usually well-paid) director’s posts of the analysed national museums and collections in European capitals. Despite progress in the gender-balanced staffing policy of these museums during the period, only two of the nine highlighted cities reach the rate of above 50% female museums directors.

Four additional capitals, where the quorum of 12 museums/collections has not been met (Athens, Rīga, Tallinn and Vilnius), have been considered and together, they account for 27 institutions. The trend figures are, already from the outset, clearly higher than in the above cases, but less dynamic: 59% female directors in 2003 compared to 67% in 2021. When looking at each of the analysed capital the following changes can be noted.

- Athens passed from 56% women in top management positions in state-funded museums in 2003 to 67% in 2021.
- Rīga passed from 63% women in top management positions in state-funded museums in 2003 to 100% in 2021.
- Tallinn passed from 63% women in top management positions in state-funded museums in 2003 to 38% in 2021.

No change occurred in the 2003–2021 period in Vilnius state-funded museums.

To conclude, the share of women as CEO of state museums may now be roughly on a par with other senior positions in the national administrations of EU Member States43. This exceeds their share among the current CEOs of public broadcasters (currently 36% – only the Nordic/Baltic States reach 100%) or members of national parliaments in the EU (women’s share: 32.5%, closest to parity is again Sweden with 47%)44. It is well above that of senior executives in private companies, where women reached only 18% in 201945. In the ‘Compendium’ information system46, expert Tobias Harding explains the background of gender-related Swedish policies (mirrored in the above figures for Stockholm): ‘The government foresees the public sector as a role model for the private sector and as ‘best practitioner’ of available effective mainstreaming instruments and measures.’

During the preparation of its technical offer and later in its first conceptual report, the HERIWELL team had reflected on certain questions. In particular, whether interpretations and impacts connected with cultural heritage are mainly mirroring changing societal values and practices, or whether they could also be seen as drivers of such changes. The above results demonstrate that the latter option can principally be verified and

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43 IPOL Department of the European Parliament (2021): *The gender gap in the EU’s public employment and leadership*. Brussels, p. 16
45 Eurostat News release No 40/2020
thus contribute to SWB via equal opportunities for female professionals. However, there needs to be a true political will or societal pressure to make it possible.

Since European statistics do not yet provide gendered data for the leadership of museums, it is recommended that the EGMUS standard questionnaire is enlarged to enable future gender monitoring. As an alternative, EIGE could be asked to provide such data at least for the largest museums in the EU (similar to the gendered data of management positions in broadcasting organisations).
5 Linkages between cultural heritage and societal well-being in EU investments

Various types of EU funds (e.g. ESIF including ETC, H2020, Creative Europe, Erasmus+ and ENI) and international funds (e.g. EEA and Norway grants) have tackled cultural heritage in the programming period 2014–2020. All the investments are significant for supporting the protection, conservation and valorisation of cultural heritage. However, the HERIWELL analysis focuses on a selection of these investments, i.e. ESIF, Creative Europe and the European Capitals of Culture programme. ESIF investments have been selected due to the significant amounts invested in cultural heritage, especially ERDF investments, as also reported by the European Court of Auditors (2020). The Creative Europe programme has been selected because this is the main EU programme specifically and entirely dedicated to culture, including cultural heritage. Finally, the European Capitals of Culture programme allows the exploration of the interplay between cultural heritage and societal well-being in the context of this major event.

Even though not directly analysed within HERIWELL, as they are not directly funded by EU institutions, Box 5.1 presents the EEA grants. These have an important role in supporting cultural heritage protection, conservation and valorisation in Eastern Europe countries (BG, CZ, HR, HU, RO, SK, SI), Baltic countries (EE, LT, LV), central Europe countries (PL) and Mediterranean countries (CY, EL, MT, PT). Even though not directly analysed within HERIWELL, as not directly funded by EU institutions, Box 5.1 also presents the EEA grants, that have an important role in supporting cultural heritage protection, conservation and valorisation in Eastern Europe countries (i.e. BG, CZ, HR, HU, RO, SK, SI), Baltic countries (EE, LT, LV), central Europe countries (i.e. PL) and Mediterranean countries (CY, EL, MT, PT).

Box 5.1 EEA and Norway grants in cultural heritage

| EEA and Norway grants are funded by Iceland, Liechtenstein and Norway, with the aim to strengthen the collaboration between these countries and the 15 EU MS benefitting from the grants. While the EEA grants are mostly funded jointly, the Norway grants are funded only by Norway. During the 2014–2021 programming period, the EEA grants amounted to EUR 1.5 billion, of which 95.8 % were provided by Norway, 3 % by Iceland and 1.2 % by Liechtenstein. The programme focuses on various topics: innovation, research, education and competitiveness; social inclusion, youth employment and poverty reduction; environment, energy, climate change and low carbon economy; culture, civil society good governance, and fundamental rights and freedoms; justice and home affairs; a fund for regional cooperation and a fund for youth employment. Cultural heritage is tackled within the ‘Culture, civil society good governance, and fundamental rights and freedoms’ topic. The EEA and Norway grants acknowledge the potential contribution of cultural heritage to local and regional development, capacity development, social inclusion, fighting discrimination and violent extremism, promoting cultural diversity and strengthening intercultural dialogue, and democracy. Considering the significant potential of cultural heritage for the well-being of societies nowadays, the EEA and Norway grants aim to enhance the safeguarding of cultural heritage, cultural entrepreneurship and cultural cooperation; widen people’s access to culture; promote cultural diversity; reinforce intercultural dialogue; and promote knowledge sharing, accelerated learning and the development of networks for international cooperation in this area. The programme includes the following areas of support: a) cultural heritage management, preservation and conservation related to national, regional and local development; b) documentation and accessibility of culture and cultural heritage; c) capacity development of cultural players; d) cultural entrepreneurship; e) cultural, creative and artistic activities contributing to sustainable development and social cohesion; f) audience development, including people in the diversity of culture, outreach and educational activities; g) networking and international cultural cooperation/exchange. In the period 2014–2020, the programme invested EUR 170 million in culture programmes, including cultural heritage. With the support of these investments, 176 CH buildings have been restored, 42 CH buildings and sites have been opened to the public, 12 new museums have been created, 274 358 CH items have been digitised and 11 funded projects received an EU Award for Cultural Heritage/Europa Nostra Award.

5.1 Linkages between CH and societal well-being in ESIF investments: main findings

5.1.1 Methodology

As anticipated in the inception report, the European Structural Investment Funds (ESIF) is the main direct source of EU funding for investments in CH. Some examples of the type of projects supported by the different ESI Funds are provided in Table 1.9 in Annex 3 (Chapter 1.4). They show that all the different forms of CH are supported, with a prevalence of tangible and digital CH supported by ERDF funding. Intangible CH is supported by the ESF, and tangible and mixed CH by the Territorial Cooperation projects and the European Agricultural Fund for Rural Development (EAFRD).

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

As described in the previous interim report, a mixed qualitative-quantitative methodology approach is adopted, based on the following three main steps as illustrated in Figure 1.1 in Annex 3.

- Collection of data and mapping of ESIF investments in cultural heritage has been undertaken at national and, whenever possible, regional level. Data and indicators include those available in EU data sources (e.g. Open Cohesion data for ERDF allocations, and the keep.eu online portal for the European Territorial Cooperation). The analysis of national ERDF and ESF data sources on financial allocations and number of projects carried out by the HERIWELL country experts represents a novelty in the ESIF analysis. The analysis was performed through a search by keywords.

- SWB indicators available at regional level will be selected as proxies of the three societal well-being dimensions identified in the HERIWELL Conceptual Framework.

- Correlation analyses are made between the ESIF investments in CH (measured as per capita allocations) and SWB indicators. The ERDF per capita allocations have been included as an explanatory variable in the econometric estimation of the relation between tangible CH, and the quality of life and social cohesion dimensions of SWB (see Chapter 2).

In the following subsections we first map allocations and projects on CH by fund, then in Section 5.1.6 we present the results of the correlation analysis.

5.1.2 ERDF allocations and projects on CH

The Open Cohesion categorisation data allows an analysis of the EU financial allocations for ERDF, focusing on intervention fields related to the cultural heritage sector. The Open Cohesion categorisation data allows an analysis of the EU financial allocations for ERDF on intervention fields related to the cultural heritage sector.47

According to these data, about EUR 6.7 billion of ERDF funds (equivalent to 3.1 % of total allocated ERDF funds) have been invested up to 2020 in the sector of culture in the 2014–2020 programming period.

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48 These are the results of a mapping of the ERDF investment 2014–2020 under the specific intervention fields 94 and 95. Additionally, the investment allocated to the intervention field related to cultural heritage under the IPAE fund for territorial cooperation is considered. Using Open Cohesion data it has been possible to consider the cumulative planned ERDF allocations 2014–2020 in CH in terms of: (i) incidence % of CH allocations over total ERDF planned allocations, and (ii)
As shown in Figure 5.1, the largest part of these funds (79%) is allocated to CH: about EUR 4.8 billion under the specific investment field 94 - Protection, development and promotion of public cultural and heritage assets (72% of total planned allocations under ERDF). An allocation of EUR 485 million (7%) falls under the intervention field 95 – Development and promotion of public cultural and heritage services. An additional EUR 69.4 million has been allocated to the intervention field related to cultural heritage under the I&P Afrique Entrepreneurs (IPAE) fund for territorial cooperation.

**Figure 5.1 Distribution of total planned allocations by intervention fields related to the cultural sector in the EU – euro and % – cumulative 2014–2020**

The distribution of ERDF investments (excluding ETC) in CH (cod_94 and cod_95) across countries and regions shows the following (Map 5.1 below and Figures 1.2 and 1.3 in Annex 3, Chapter 1.1).

- EU MSs with the highest allocations (absolute amount) are PL (EUR 989.5 million), PT (EUR 768 million), IT (EUR 700.6 million), CZ (EUR 408.3 million) and RO (EUR 312.6 million). EUR 642.8 million has been allocated under specific ERDF programmes for territorial cooperation.

- Compared to 2.5% of the EU average, MSs with the highest incidence of CH allocations over total ERDF allocations are MT (15.2%), PT (6.2%) and CY (4.2%). In Poland and Italy, CH accounts for 2.5% and 2.8% of total ERDF allocations, respectively.

- Regions with the highest incidence in CH allocations over total ERDF allocations are: Centro, PT (17.2% – EUR 312 million); Alentejo, PT (14.6% – EUR 132 million); Valle d’Aosta, IT (15.2% – EUR 4.6 million); Ionian Islands, EL (14.3% – EUR 19 million); Malta (15.2% – EUR 48 million); Limousin, FR (9.5% – EUR 12.6 million); South Aegean, EL (9.2% – EUR 4.8 million); Continental Greece, EL (9.1% – EUR 6 million); Umbria, IT (9.3% – EUR 18.5 million); Eastern Macedonia-Thrace, EL (8.1% – EUR 24 million); Région de Bruxelles-Capitale, BE (8.2% – EUR 8 million) and Norte, PT (8.1% – EUR 229 million).

- Portuguese regions also show the highest level of allocations per inhabitant: the CH allocation per capita is more than EUR 100 in Alentejo (EUR 183), the Autonomous Region of the Azores (EUR...
147) and Centro (EUR 139). Malta and the Ionian Islands (EL) also register high levels of per capita allocations for CH, equivalent to EUR 104 and 92, respectively.

**Map 5.1 Planned ERDF allocations (excluding ETC) in intervention fields related to CH (94 and 95), cumulative allocations 2014–2020 (% incidence over total ERDF allocations, and euro per capita)**

![Map showing planned ERDF allocations in CH (94 and 95), cumulative 2014–2020 (incidence over total ERDF allocations and euro per capita).](image)

**Source:** HERIWELL elaboration on Open Cohesion and Eurostat data.

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

As highlighted in the previous interim report, managing authorities classify interventions discretionally. Therefore, some interventions on cultural heritage may be classified under categories other than 94 or 95, or may be financed under another ESIF fund (e.g. ESF and EAFRD). To overcome this issue and the lack of data on the number of CH projects, the HERIWELL country experts have been asked to perform a mapping of the data available, using keywords. This covers the number of projects and financial investments funded under ERDF with the exclusion of ETC projects – and ESF and EAFRD in the national sources.

The analysis of the national databases shows that overall, 5494 projects related to cultural heritage have been financed under ERDF (excluding ETC projects) in the 2014–2020 programming period. This amounts to a total of EUR 21 billion, equivalent to 10.3 % of the total planned allocations.

This assessment (see Table 1.5 in Annex 3, Chapter 1.2.3) shows that in most countries (excluding CY, HU, IE and PT), the sum (at national level) of ERDF allocation of projects involving CH are greater than those

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49 Table 1.4 in Annex 3 (Chapter 1.2.2) presents evidence of the recognition conducted by the HERIWELL country experts on national databases available in their countries. The recognition shows that, while for ESF and ERDF information is available in most of the EU MSs, less information is available regarding the EAFRD.
registered in the Open Cohesion database under the 94 and 95 categories. Therefore, many projects dealing with CH are classified by managing authorities under other codes, besides codes 94 and 95 of the ERDF.

Average ERDF allocations per project in cultural heritage, as identified by the country experts from national databases, are presented in Map 5.2 below, while Annex 3 (Chapter 1.2.3) presents maps on the number of projects and total allocations.

**Map 5.2 ERDF (ETC excluded) average allocations per CH project according to national databases, cumulative allocations 2014–2020 (million EUR per project)**

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

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

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

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

Using the information available in the keep.eu portal on the partners’ localisation at NUTS level, it has been possible to sum up budget data at regional (NUTS 2) level. The following map provides an overview of the

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

For the database, it is possible to make three types of selection: the list of lead partners, the list of partners and the list of calls. The list of partners, in particular, contains the following information: Programme; Acronym; Project Partner; Lead Partner; Street; Postal Code; Town; Country; Website; Department; Legal Status; Country Code; NUTS 1 (or equivalent); NUTS 2 (or equivalent); NUTS 3 (or equivalent); Total eligible budget/expenditure; ERDF budget; ENPI/ENI budget; IPA II budget; ERDF equivalent budget.

52 The Interact Programme – with the support of the European Commission and the remaining Interreg, Interreg IPA cross-border, ENPI/ENI, and IPA-IPA cross-border programmes – built this database and maintains it, as part of its mission.
total allocations under European Territorial Cooperation in the relevant fields of cultural heritage (as defined in the methodology described in the Annex). A total of 1085 projects in CH have been selected, for an eligible budget/expenditure of EUR 1.144 million for the 2014–2020 programming period. The countries involved in the selected ETC projects in CH include the 27 Member States, the UK, the four EFTA, the five Western Balkans countries and Turkey. The analysis shows that overall, 264 regions (NUTS 2 level) have been involved.

Map 5.4 European Territorial Cooperation Total eligible budget in CH, cumulative 2014–2020 (million EUR)

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

Using information available in the keep.eu portal on the partners’ localisation at NUTS level it has been possible to sum up the ERDF budget at regional (NUTS 2) level. The following map provides an overview of the ERDF allocations under European Territorial Cooperation in the relevant fields of cultural heritage (as defined above). The countries with at least one region with ERDF allocation on ETC projects in CH include 27 Member States, the UK and five Western Balkans countries (with the exclusion of Kosovo).

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

54 For the computing the number of projects mentioned we used the list of partners database.
Overall, 224 regions (NUTS 2 level) have been involved and a total of EUR 779 million under ERDF has been allocated in the 2014–2020 programming period to ETC projects on cultural heritage.

**Map 5.5 European Territorial Cooperation CH projects with ERDF budget, cumulative ERDF eligible allocations, 2014–2020 (million EUR)**

The analysis of CH-related projects funded by EAFRD has been conducted on the basis of the database available on the ENDR online portal, in the section ‘projects & practice’. The following map provides an overview of the allocations under EAFRD in the relevant fields of cultural heritage. EAFRD has financed projects in the field of CH in 19 countries, for a total amount of EUR 8.03 million. The countries with the largest allocations are Ireland (EUR 2.71 million), Italy (EUR 2.01 million) and Slovakia (EUR 830 494).

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55 It is available at [https://enrd.ec.europa.eu/projects-practice_en](https://enrd.ec.europa.eu/projects-practice_en) The ENRD Projects & Practice database only contains a limited number of selected EAFRD funded projects: hence, the total value of allocations in CH is underestimated.

The methodology used can be described as follows: 1) Using the filters provided by the online portal, a first research was conducted to identify the projects that were classified under the keyword ‘Culture’. Results of the research were then examined by reading the project summary sheets in pdf (available on the ENDR portal) to verify if they fell within the scope of the agreed definition of Ch. 2) The same procedure was followed for a second research, this time using a list of other relevant keywords (cultural heritage; museum; library; monument; protected building; church; religious buildings; archaeological site; archives; industrial heritage; cultural/historical event; rituals; festivities; traditional crafts; digital heritage; digital collections; digitisation of libraries/museums/archives). 3) A database with the relevant projects was created.
5.1.6 ERDF allocations on CH and social well-being: a correlation analysis

A correlation analysis has been carried out considering the total planned ERDF allocations in cultural heritage for the period 2014–2020 resulting from Open Cohesion data (Annex 3, Table 1.7 in Chapter 1.3) and a subset of the SWB indicators available at regional level has been included.

The analysis, presented in Annex 3, shows a general low level of correlation, even if the correlation signs show a positive relationship between CH allocations and SWB. The low correlations are expected, also due to the complexity of the relationship and the difficulty of grasping it at macro level. In addition, it is too early to detect significant results so that a stronger correlation could emerge over time.

For quality of life indicators, ERDF allocations in CH are positively correlated with the tertiary education attainment indicator (0.27), the adult participation in lifelong learning indicator (0.35) and the good health indicator (0.19). However, there is a positive correlation with air pollution, probably related to the fact that investments in tangible heritage may be associated with high tourism attractiveness and increased pollution. This is underlined, for example, in some of the European Capitals of Culture (ECoC) cases considered in Section 5.3 below.

Considering the societal cohesion dimensions, ERDF allocations in CH are positively correlated with indicators on freedom over life choices (0.30), job opportunities (0.25), making friends (0.17) and volunteering (0.31). An even stronger positive correlation emerges in relation to the quality of institutions (0.35). The analysis also shows that a higher incidence of ERDF allocations in CH is associated with lower...
poverty risks (~0.21), severe deprivation (~0.31) and inequality (NEET rate ~0.24 and employment gender gap ~0.33).

As for material conditions, results show a positive correlation between ERDF allocations in CH and the employment rate (0.24). The correlation with the GDP per capita is negative (~0.31), probably related to the ERDF allocation rule, with higher ERDF allocations in less developed regions.

Similar correlation results are obtained when considering the ESF and the ETC per capita allocations, according to the data collected by national experts (see Table 1.8 in Annex 3, Chapter 1.3).

The results of the pan-European econometric analysis presented in Chapter 2 confirms a negative and statistically significant relation between the incidence of ERDF allocations on CH and the NEET rate. An increase in the share of ERDF CH allocations reduces the NEET rate, with a positive effect on social cohesion.

5.2 Creative Europe investments in CH and societal well-being: main findings

5.2.1 Creative Europe investments in CH: methodology

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

According to the European Commission’s project database for the Creative Europe programme56, in the programming period 2014–2020 4451 projects in the cultural and creative sectors have been funded. The database does not provide any information on the investments by type of sector or topic (e.g. cultural heritage) and does not allow a categorisation of projects according to their topic(s) or investment sectors. Therefore, the following methodology was used to identify projects related to CH investments. First, a manual search of the database was made through selected keywords57. Second, to avoid duplicate projects, any not dealing with CH or not relevant for the aim of this study, a qualitative data cleaning was carried out. For example, the search with the key term ‘heritage’ also included, in the automatic extraction, files where the keyword ‘heritage’ is presented as negative e.g. ‘This project does not focus specifically on cultural heritage’. The manual data cleaning thus allows these kinds of projects to be deleted from the final list of the projects to be analysed. Once extracted, each project was manually associated to one of the macro-categories of CH (tangible, intangible, digital) identified in this study. Then all the projects were analysed in terms of number and funding, taking into account the project’s coordinator. Finally, they were qualitatively assessed according to the potential impact on SWB dimensions (quality of life, societal cohesion and material conditions) as identified within this study.

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56 The database contains descriptions of all projects funded under the Creative Europe – Culture sub-programme and some of the projects financed under the Creative Europe – MEDIA sub-programme. Relevant available information for each project is: funding year, start date/end date, project summary, coordinator’s country, partners’ countries and expected funding. For this study, only Creative Europe has been considered.

5.2.2 Creative Europe investments in CH: main findings

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

Figure 5.2 Shares of projects by CH typology (%)

Figure 5.3 Number of CH projects, by year of financing

The number of funded projects across the years went from a minimum of 18 projects in 2015 to a maximum of 53 projects in 2018. The number of funded CH projects shows a similar trend with the other projects financed by the Creative Europe programme, with the exception of 2019.

The projects’ duration varied: 26.8% of projects lasted less than 12 months, 33.9% between 13 and 24 months and around 40%, more than 24 months.

The maps below show the distribution of projects and the total amount of expected funding by coordinator’s country. This provided a proxy for where the Creative Europe financing might have had a greater impact in financing CH.

As can be seen below, FR (36 projects), BE (29 projects), IT (28 projects) and DE (26 projects) are the countries which coordinated the highest number of the projects associated with CH. They are also (with the exception of Italy) those where the project coordinators were expected to receive the highest amount of financing (FR, BE and DE) with more than EUR 6 million in the 2014–2020 period (Maps 5.7 and 5.8).

Taking into account all the selected projects, the average funding per project is EUR 327 047.37.

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58 The automatic search with the keywords allowed the extraction of 1189 projects. The process of data cleaning led to the identification of the final selection of 224 projects.

59 Calculations are made with regard to the expected funding of the project coordinators.
Unfortunately, the available data do not allow a disaggregation by project partners, nor does it establish the effective amount of received funding. However, the selected projects can be classified according to CH investments by number of partner countries (size of consortia) and by overall amount of expected funding.

We expect that larger projects (in terms of funding and size of the partnership) have a higher probability of producing wider impacts both in terms of societal well-being and territorial coverage, as they have better access to resources. This does not mean, however, that projects with relatively low budget and/or number of partners are less relevant than the larger projects.

Taking into consideration the intensity of the funding and the size of the partnerships, selected projects can be classified into: those with potential narrow impact (135 projects with low-medium amount of financing and low-medium consortium dimensions); those with potential medium impact (60 projects with high financing but with small-medium consortium dimensions); and those with potential wide impact (21 projects with high amount of financing and medium-high consortium dimensions). (See Table 5.1)

<table>
<thead>
<tr>
<th>Consortium dimensions</th>
<th>low</th>
<th>medium</th>
<th>high</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small</td>
<td>21</td>
<td>41</td>
<td>62</td>
<td>124</td>
</tr>
<tr>
<td>medium</td>
<td>73</td>
<td>2</td>
<td>3</td>
<td>78</td>
</tr>
<tr>
<td>large</td>
<td>4</td>
<td>2</td>
<td>16</td>
<td>22</td>
</tr>
<tr>
<td>Total</td>
<td>98</td>
<td>45</td>
<td>81</td>
<td>224</td>
</tr>
</tbody>
</table>

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

According to this qualitative assessment, out of the selected 224 CH-related projects 64 % had a potential impact on societal cohesion, 57 % on quality of life and 30 % on material conditions. As Figure 5.4 shows, the dimension of material conditions is the least potentially impacted by Creative Europe projects. On the

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60 Identified as small (projects involving partners from at most three countries), medium (projects involving from four to six partners), large (projects involving partners from more than six countries).
61 Identified as low (projects receiving less than EUR 50 000), medium (projects receiving between EUR 50 000 and EUR 100 000) and high (projects receiving more than EUR 100 000).
62 A project might impact on more than one dimension, so the shares are not summing up to 100.
contrary, most of the projects might have positively impacted the societal cohesion dimension, in the context where they were implemented.

**Figure 5.4 Percentage of projects impacting SWB macro-dimensions, by typology of heritage**

![Percentage of projects impacting SWB macro-dimensions, by typology of heritage](image)

*Source: HERIWELL elaboration on Creative Europe data*

### 5.3 Linkages between CH and societal well-being in the European Capitals of Culture: main findings

#### 5.3.1 Methodology

The ECoC initiative aims at promoting and celebrating Europe’s rich cultural diversity and heritages, mutual understanding and intercultural dialogue, and to put cities at the centre of cultural life across Europe. The European Capitals of Culture receive various types of funding, including EU funds e.g. national funding, ESIF funding and Creative Europe funding (such as the Melina Mercouri Prize).

The initiative includes several types of interventions, among which is the refurbishment and valorisation of cultural heritage (e.g. museums and historical buildings). The full analysis of the contribution of CH investments to societal well-being is hindered by the limited comparable quantitative data on its effects. The evaluation reports available for the 2007–2015 period only contain narrative information and lack a comparison of the results achieved with the *ex-ante* situation. Therefore, a **qualitative meta-analysis** has been carried out to shed light on ECoC’s objectives and results in the field of cultural heritage. This has also assessed their potential impacts on the societal dimensions identified in the HERIWELL theory of change.

The qualitative meta-analysis started from the identification of the **overall financial resources received by the ECoC during the title year**, and the **main events/actions/activities implemented**. It has particular reference to cultural heritage and the **main results** reported, to the extent possible considering only the activities related to CH. According to the information available on financing resources, events and activities implemented, and observed outputs, an **evaluation framework** was established. This provides an overview of how the three macro-dimensions of societal well-being (quality of life, societal cohesion and material conditions) are potentially valorised by the action of ECoC.

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63 Due to the narrative structure of the reports, the information is not available in terms of quantitative indicators. However, any available quantitative data is documented in addition to qualitative information.
The qualitative assessment used the data and information included the ECoC evaluation reports, covering the capitals financed in the period from 2014 to 2019. Eight ECoC were selected, that proposed in their application a specific focus on CH promotion, preservation or valorisation: Umeå, Rīga, Mons, Wrocław, Paphos, Valletta, Matera and Plovdiv. More details on the motivation for the choice of these eight capitals of culture are provided in Annex 3 (Chapter 2). The information collected through the desk analysis were complemented by information and data collected through interviews with ECoC representatives at local level (to be finalised for the final report). This was done to better establish the perceived and effective impact of ECoC actions on SWB dimensions. Furthermore, the findings will be validated through an online workshop involving representatives of the analysed ECoC to be organised in the next few months.

5.3.2 Main findings

The analysis of ECoC collected data and information allowed the identification of the main outputs/results achieved in terms of CH by the eight selected cities. It also showed the potential linkages between cultural heritage and societal well-being in these cities. Even though the analysis focuses on cultural heritage, the results and societal well-being outcomes should be interpreted in the context of the wider cultural strategies pursued by these ECoC cities.

All of the considered capitals used the opportunity of being ECoC to achieve important results mainly in terms of tangible CH results. Only two out of the eight cities, Umeå and Paphos, focused on more intangible CH results. Among the eight cities, Mons and Matera also paid particular attention to digital cultural heritage. In the following paragraphs we present the main results emerging from the evaluation reports and interviews; further details on the outputs/results and inputs are provided in Annex 3, Chapter 2.

In Umeå, the ECoC programme envisaged an active involvement of the Saami community for the valorisation of their traditions and cultural heritage; in Paphos, attention was focused on the Cypriot cultural melting pot. This included the revitalisation of Cypriot ancient myths of Paphos with other European cultural stakeholders, as well as Egyptian, Israeli and the Turkish-Cypriot stakeholders. The Umeå case provides interesting indications on the conflicts that may arise when dealing with cultural heritage. Disputes over the use of the Saami intangible heritage emerged in this case initially from the Saami minority, which felt left out of the decision-making process. They also felt exploited for territorial branding reasons, and subsequently the Swedish majority felt that the Saami heritage was over-represented. Even if contested, the ECoC Umeå allowed a recognition of the place of the Saami heritage in the identity of the city, and for questioning the power relations in the city. As a result of these conflicts, some moves towards ‘widening the democratic processes towards the greater inclusion of Saami interests and respect for Saami culture’ (Hudson et al., 2019, p. 576) have been made. This has relevant implications for the quality of democratic processes and active citizenship of all citizens.
In Mons, digitisation of heritage and preservation of digital heritage has played a relevant role from the beginning and has been recognised as an asset early in the ECoC process and strategy. The ‘digital’ approach of the programme aimed to find new ways to use the technology. This was in the context of reducing the social and digital divide, empowering citizens, creating new forms of artistic expression and new economic models, and bringing people together. The digital projects such as Café Europa related very directly to the overall development strategy of the city based on growth of culture and the development of hi-tech enterprises. Indeed, investments in digital CH are part of the wider framework ‘Digital Innovation Valley’ for hi-tech development in Mons.

In Matera, the I-DEA (Institute of Demo-Ethno-Anthropical Archive) project aimed to digitise the existing archives of the Basilicata region in Italy and make them publicly available and easily accessible for all. The archive collected a large number of public documents, but also material from private collections and cultural associations. The project aimed to be a prototype for a new conception of local European cultural institutions of the 21st century. In fact, I-DEA had already collected existing documents and files from the local area, with a view to maximising the potential of existing heritage resources. Another interesting feature of this project related to the mapping of oral memories from the city and the region. This contributed to documenting the cultural aspects of the region, such as the rituals, festivals, dialects, gastronomy and other aspects of Basilicata’s tangible and intangible cultural heritage. In practical terms, the institution did not physically centralise these collections but instead linked them to a central network working as a point of access for all citizens.

In the other cities, results were mainly related to the revitalisation and promotion of ancient buildings, including cases of contested heritage. For example, in Rīga one of the success stories is the reinvigoration of Stūra māja (ex-KGB building) and its filling with cultural content. The building was open to the public who were able to view an exhibition by the Museum of the Occupation, take guided tours of the KGB cells and view five exhibitions. The building both instigated extensive public debate on historical issues and attracted record interest (85 645 visitors). In addition, many events were held outside traditional cultural venues and outside the city centre. According to the interviewees, the decentralisation of event venues was one of the most significant achievements of the Rīga 2014 ECoC. The sustainability of these benefits was ensured by the Rīga City Council’s planned support of neighbourhood projects in the subsequent years through the 'Cofunding programme for Creative Quartals and Territories'. Furthermore, in 2017 the 'Mobile Cultural Space Bee-hive' was created to ensure the further decentralisation of cultural activities, in particular in neighbourhoods, not disposing of cultural venues.

In a similar way, in Plovdiv the main funded activities focused on CH preservation and promotion through, for example, the restoration of the Episcopal Basilica of Philippopolis and the Antiquity mosaics of Plovdiv. Also noteworthy is the renovation of the central city square as a seat of all cultural heritage periods of the city of Plovdiv, including the Ancient Forum of Philippopolis.

In Valletta one of the most significant targets achieved in CH promotion and valorisation was the ‘Valletta Design Cluster’. This has shed light on the importance of requalifying built heritage into contemporary uses that are true to their original function. Interviews with Valletta stakeholders point out that funding received for the ECoC had a multiplier effect attracting other investments. Another relevant result was the increase in the capacity of cultural heritage stakeholders.

In Wrocław, a number of interventions in infrastructure (renovation, revitalisation) were only possible because of the ECoC funds. In addition, Wrocław devoted a whole strand in its programme to architecture. As interviewed experts pointed out, this decision was quite important not only for promoting modern architectural design, but also for dealing with the city’s identity, narrative and heritage. Another legacy of the Wrocław ECoC regards the decentralisation of cultural activities and heritage through the creation of cultural points around the city, managed by NGOs and supported by the municipality.

In Mons, five museums (Arsonic, a new music venue; l’Artothèque, the main centre for archiving, researching, restoring and studying the heritage of Mons; Mons Memorial Museum, a museum of military history; Musée du Doudou dedicated to the traditional Ducasse festival and to Saint George and the Dragon; and SILEX’S interpretive centre at the Neolithic flint mines of Spiennes) and the Beffroi (closed down for 30 years) opened or re-opened in the occasion of ECoC 2015.

Two other results can be identified in all analysed capitals: improved accessibility and a higher engagement of citizens in heritage.
Accessibility is understood as ‘structural factors that influence whether something is get-at-able, both in terms of places (i.e. the accessibility of a location) and in terms of people (i.e. their ability to access goods and services)’ (Knowles et al., 2008, p.50). For accessibility of places, some significant results were achieved in Valletta through the increased accessibility of cultural venues and heritage for people with disabilities. Furthermore, interviewees point out that, in Valletta, future ideas emerged on increasing the accessibility of cultural heritage through making it part of the living and walking routes people use (e.g. use of the MUŻA museum as an access between two key areas in Valletta). The quality of buildings was also tackled (e.g. in Paphos, Riga, Valletta and Mons), through refurbishment processes also ensuring their accessibility. Accessibility for socially disadvantaged groups was addressed in different ways: e.g. targeting cultural and heritage activities to social groups that had previously never engaged in the cultural life of the city in Plovdiv, Riga, and Mons (i.e. Roma minority, young people from deprived neighbourhoods, older people from smaller towns and villages, prisoners, people with disabilities, and Rīga people not attending cultural activities); moving culture outdoors and outside traditional cultural spaces to also ‘tame’ unknown heritage in the Wrocław case; increasing free access to cultural and heritage activities in Rīga; use of traditional (TV and radio) and digital communication channels to make cultural and heritage activities accessible to people in Rīga and Plovdiv; decentralising cultural and heritage activities, to bring them closer to people Wrocław, Rīga; connecting cultural heritage to exiting local networks to increase its accessibility in Matera; combining entertainment and educational activities to make cultural and heritage activities more interesting in Plovdiv and Matera.

Higher engagement of people in cultural activities is another relevant result of the analysed capitals. All interviewees emphasise citizens’ and stakeholders’ engagement in cultural and heritage activities as particularly relevant for achieving social outcomes. For instance, a study on co-creation in Matera ECoC reveals that ‘the participatory processes in the context of MCEC 2019 have, overall, generated significant positive effects, both in terms of involvement and of participatory awareness, positively affecting the psychological well-being of citizens’ (Sacco et al., 2020). In particular, Sacco et al. (2020) underline that co-creation in Matera ECoC has resulted in an increased interest in actively participating in cultural activities; personal growth; confidence in others and increased collaboration among participants in the co-creation processes; feelings of pride and increased life satisfaction. However, the Umeå case reveals that for cultural participation to produce social outcomes the following aspects should not be neglected: active participation of under-represented groups (e.g. Saami minority); active involvement of participants from the design phase of the policy agenda; ensuring equality between the owner of the participatory process and participants engaged; and inclusion of the decisions taken during participatory processes in the policymaking process (Hudson, Sandberg & Schmauch, 2017). Participatory processes are aimed to democratise the decision-making processes, and, hence, question power relations in society. In the Umeå case most of the projects (40 projects out of 83) involved the use of co-creation in the cultural and heritage field to bring people together and foster social capital (34 projects out of 83) (Hudson, Sandberg & Schmauch, 2017). Only in nine projects (out of 83), was it used to change power relations in the city, revealing the need for a further meaningful use of co-creation in the cultural policy arena (Hudson, Sandberg & Schmauch, 2017).

The meta-analysis of selected ECoC cities is based on desk analysis of the ECoC evaluation reports and interviews with ECoC local stakeholders of six of the eight selected cities. It allows us to draw some conclusions on the linkages between cultural heritage and societal well-being as defined in the HERIWELL project. As noted in the figure below, in the analysed cities cultural heritage presents linkages with all the three dimensions of societal well-being considered in the HERIWELL theory of change.
In particular, the strong link between cultural heritage and societal cohesion can be noted. Cultural heritage seems to affect almost all the sub-dimensions of societal cohesion in nearly all eight capitals, but for trust showing a relation with heritage only in Riga and Matera. As detailed in Box 5.2 below, the valorisation of heritage resources for societal well-being purposes is not free of conflicts, as the Umeå ECoC case shows. Thus, particular attention should be paid on the one hand to what and whose heritage is valued, and on the other hand to the active engagement of all citizens. This is especially important where there are minority and marginalised groups, when shaping the heritage policy agenda in this area.

**Box 5.1 Linkages between cultural heritage and societal cohesion in the eight selected ECoC cities/towns**

Interviews with ECoC representatives point out the relevant effects of heritage on community engagement and volunteering. For instance, in Plovdiv 400 people were engaged in volunteering activities within ECoC; Paphos ECoC mobilised 350 local and international volunteers; Matera ECoC engaged 600 volunteers; Valletta devised a specific volunteering scheme that attracted several non-Maltese participants; Riga ECoC engaged 3 700 volunteers.

According to interviews, ECoC also contributed to enhancing citizens’ participation as co-creators in cultural and heritage activities. For instance, in Riga ECoC one in four events saw the participation of citizens as co-creators of cultural activities; in Umeå almost half of the ECoC cultural projects delivered involved the engagement of citizens as co-producers; in Valletta ECoC citizens were engaged as co-creators through several specific initiatives; in Paphos ECoC, cultural heritage was instrumentalised to create culture through the interaction between the visitors and local inhabitants and citizens’ active engagement was deemed essential for the effectiveness of ECoC. In Wrocław ECoC, the participatory approach to the issue of creating cultural policy seems to be a process internalised by a large part of...
the cultural sector in Wrocław’ (Sanetra-Szeliga, Purchia, Knaś, Kozioł and Dąbrowski, 2020, p. 167). In Matera, around 57 000 citizens have been directly involved in cultural production. According to Sacco et al. (2020), co-creation in Matera has increased participants’ interest in continuing to be actively engaged in cultural activities (75 % of the surveyed people). This includes cultural heritage and has contributed to ‘challenging the limits of their knowledge and experience’ (p. 3) and to developing their skills (around 60 % of the surveyed people); to increasing their trust in themselves and others (around 46.5% of the surveyed people); and their ability to collaborate with others (around 80 %).

Interviews reveal that ECoC also triggered a sense of identity and belonging in particular through the discovery of unknown heritage or intangible heritage. In one case (Umeå), identity was strengthened within a conflicting process over the valorisation of intangible heritage of minorities (i.e. Saami). This pointed out the need to pay attention to both majority and minority population’s narratives of heritage and heritage resources. A similar conclusion is also reached for Matera ECoC, where ‘the “staging” of past ways of urban living in the area risks displaying elements of staged authenticity (MacCannell, 1973; Ponzini et al., 2019) and Disneyfication’, ignoring different ‘narratives of the Sassi, for example the values and meanings that younger generations attribute to them’ (Politecnico di Milano, University of Hull, Neapolis University Pafos, International Cultural Centre, 2020, p. 52). In Paphos, heritage was targeted to enhance the European cultural identity and Mediterranean identity, rather than the local one. The survey undertaken within the ECoC evaluation reveals that 43.7 % of those who attended ECoC activities showed a desire to interact more with other cultures, compared to only 24 % of those who did not attend ECoC activities. In Wrocław, an important contribution of cultural heritage to creating identity and sense of belonging might have been the development of a new narrative of the city. This happened through the rediscovery of its unknown heritage (e.g. German material heritage), as, for many years, Wrocław inhabitants had ‘a memory prosthesis’ (ECoC interviewee). It has also contributed to changing the perception of contested heritage in Wrocław, which is increasingly revalued. In Valletta, a 2018 survey shows that the ECoC contributed to the feeling of pride for Valletta residents more than for those living outside Valletta (Valletta 2018, 2018). In Mons, the KEA study of ECoC (2016) points out that 67 % of the respondents believed that Mons 2015 helped to develop a greater sense of belonging and pride among the people of Mons.

According to ECoC interviews, cultural heritage also contributes extensively to fostering inclusivity in both the heritage field and, more in general, in society. For instance, in Umeå the rediscovery of its colonial past and of the heritage of the Saami minority provided an opportunity for fostering the inclusion of the Saami minority. Paphos ECoC transformed the ‘openness’ concept of ancient Greeks (i.e. a model of social interaction that was tested in ancient times) into a model of modern cultural development. In Wrocław, social inclusion was a relevant topic dealt with by ECoC, and in Riga the ECoC programme had an impact on social integration, according to the interviewees. In Valletta, the ECoC contributed to fostering social inclusion, in particular for people with disabilities. This also emerged from a survey undertaken in 2018. According to this, the levels of agreement of the average respondent with the affirmation ‘Valletta as a city which is accessible to everyone’ are higher at the end of Valletta ECoC than at its beginning (Valletta 2018, 2018). In Mons, according to the KEA study of ECoC Mons (2016), 68 % of the surveyed people consider that ECoC Mons was beneficial to social inclusion of disadvantaged categories.

Furthermore, heritage seems to also have a significant relation with material conditions. Heritage proves to be particularly useful for enhancing the territorial attractiveness of people in all analysed capitals; its contribution to growth and job seems to be registered in five out of the eight analysed cities. This is not a surprise as the value of cultural heritage to ensure regeneration of urban and rural territories as well as economic growth has been extensively acknowledged in the literature (OECD, 2021; ESPON, 2020; ESPON, 2019; European Parliament, 2019). However, as detailed in Box 5.3 below, the valorisation of heritage for economic development purposes is ambivalent. In the absence of a social and environmental sustainability-led strategy, it may create negative effects for residents (e.g. increases in housing prices and shortage of housing, concerns over the ‘faking’ of the identity of a territory, pollution). To mitigate such effects, policymakers should take into consideration that ‘social life in public spaces is a fundamental contributor towards individual and social quality of life’, and that the will ‘to create spaces that work for people’ makes ‘a tremendous difference ... to the life of a city’ (Whyte 1980, p.15, Valletta 2018, 2018, p. 155). In addition, as pointed out by one of the ECoC Valletta interviewees, ‘renewal of heritage through restoration and recuperation and its integration in today’s cities should take place in the wider context of changing demographic and societal realities. Ensuring inclusivity and widening the understanding of the city’s heritage dimension to social groups and realities that do not necessarily stand within the conventionally understood history of the city is important.’ (ECoC interviewee).
Box 5.2 Linkages between heritage and material conditions in the analysed ECoCs

Interviews with ECoC representatives revealed the significant contribution of ECoC to *increasing employment and business opportunities* in the ECoC areas. For instance, the evaluation of Valletta ECoC shows that, following ECoC Valletta, 8000 jobs were created in different sectors (e.g. heritage, creativity, hospitality, information technology and transport). In addition, ECoC Valletta generated EUR 678 million worth of investment in the Maltese economy and had an economic impact exceeding EUR 325 million, with GDP growth of 2.23 in 2018 (Valletta, 2018). However, interviews with stakeholders point out the need to strengthen the economic contribution of cultural and creative sectors, including heritage. An improvement their linkages with the other economic sectors (e.g. ICT, primarily services, advertising, marketing research) is needed, as well as the provision of domestically produced competitive inputs. In *Wrocław*, even though there are no quantitave data about the economic impact, studies (Sanetra-Szeliga, Purchla, Knaś, Kozioł and Dąbrowski, 2020) and interviews assume a positive economic impact of ECoC. This is considering the relevant increase in the number of tourists (five million tourists during the ECoC), the positive perception among Polish people of *Wrocław* and the considerable investments made in cultural heritage. In general, culture, the activation of specific culture and cultural heritage funding schemes at local level after the ECoC and the change in the perception on heritage are seen as an asset of local development. In *Mons ECoC*, the estimated economic return was EUR 5.50 for every EUR 1 invested by the regional authorities (Mons 2015 Foundation). Furthermore, in Mons a KEA survey of the Mons 2015 Entreprises Club shows that 68% of those surveyed consider that ECoC had positive economic consequences for the local economy. This was linked to different factors such as increased visibility for local enterprises, new business settlements and a more competitive business environment.

ECoC also contributed to *territorial attractiveness and branding*. In almost all analysed capitals this has occurred, in particular through urban refurbishment – the renovation of heritage sites/places, revival of peripheral/neglected areas including heritage sites/places and development of new cultural attractors (e.g. museums, arts centres, cultural points). In *Wrocław*, heritage projects contributed to ‘the search for a new basis for city development (EccT01, Wrocław 5/06/2019) and the need to modernise (Chmielewski et al., 2011: 39)’ (Sanetra-Szeliga, Purchla, Knaś, Kozioł and Dąbrowski, 2020, p. 147). Furthermore, ECoC Wrocław ‘not only increased the influx of international tourists, but also enhanced the national perception of the city. The features strongly valued by the visitors from other Polish cities were the architecture, tourist attractiveness and the unique identity’ (Pluta et al., 2017b: 14); (Sanetra-Szeliga, Purchla, Knaś, Kozioł and Dąbrowski, 2020, p. 148). In *Riga ECoC*, neighbourhood activities resulted in improvements in territorial attractiveness, especially of some neglected areas. As the activities of the residents continued and the financial support of the city council was available through the special funding programme, many territories in Riga have significantly improved since 2014. *Valletta ECoC* opened ‘opportunities for the valorisation, restoration and reintegration in the built fabric of Valletta a number of heritage assets that were marginal to the dominant/mainstream heritage narrative. The restoration of the Old Abattoir and its conversion into the new Valletta Design Cluster illustrates this point, shedding a light on a socially depressed and infrastructural neglected area of the city and making use of residents’ aspirations and contributions to convert this site into a culturally and socially relevant space for the community.’ (ECoC Valletta interviewee). Valletta also benefited from a considerable increase in tourism, although this brought *several negative effects* including concerns about the loss of the identity of the city. Increases in property and rental prices exacerbated concerns over the displacement of Valletta residents, in particular those from marginalised groups (‘…Valletta will eventually become a city in which only wealthy foreigners and some well-off Maltese can reasonably afford to live’, Valletta 2018, 2018, p. 147). As pointed out by Valletta 2018 (2018), ‘Valletta tends to be seen as caught between the twin cogwheels of monumentalisation by the state on the one hand and real estate speculation by private landowners on the other’ (p. 155). Ambivalence of the contribution of cultural heritage to territorial attractiveness and branding are also expressed in the ECoC *Umeå* case, where grassroots organisations expressed concerns that ‘[..] Umeå’s role as ‘the capital of counterculture’ and the spirit of ‘do-it yourself’ considered to be highly important in Umeå’s local identity were being squeezed out and too much emphasis was being placed on culture’s role in generating economic growth and city development.’ (Hudson, Sandberg and Schmauch, 2018, p. 8). Furthermore, the renovation of buildings has also resulted in increase in rental prices, making their use more difficult for youth entrepreneurs in the cultural sector, including heritage. *In Mons*, research by KEA found that 86% of

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64 ECoC has shown very clearly that the monuments and heritage, historical objects and so on, that they are the real value in this city, which directly translates into money, tourist traffic, are the actual attractors. And when we work with them and bet on them, there will be tangible benefits – WroCons01, Wrocław 5/06/2019 in Sanetra-Szeliga, Purchla, Knaś, Kozioł and Dąbrowski, 2020, p. 161.
residents of Mons felt that the ECoC had been a positive event, triggering the transformation of Mons. Nationally, ECoC Mons 2015 strengthened the cultural image of Mons and its positioning as a city of culture, being effective in attracting international tourists from a wide range of EU and non-EU countries. An increase in territorial attractiveness has also been noted for ECoC Matera.

Light and shadows also emerge in the relation between heritage and quality of life. While all the sub-dimensions considered by the quality of life seem to be impacted by heritage, the intensity of the impact varies extensively among the sub-dimensions. In all eight selected capitals, heritage has a relevant relation in particular with education and skills, including digitisation and digital skills, and with contentment and happiness. The relation with the other quality of life sub-dimensions seems to be weaker. However, this might be due not only to the absence of a link, but also to these sub-dimensions not always being specifically considered in the ECoC monitoring and evaluations. This makes their assessment more difficult for interviewees. Indeed, where such dimensions have been specifically considered, as for instance in the case of ECoC Matera, the studies conducted show a positive contribution of ECoC to individual well-being. For Matera, ECoC contributed to increasing perception of physical and psychological well-being (‘72.4 % declare themselves “definitely full of energy” and “quite full of energy”, about 16 % more than the following year’, Sacco et al., 2020, p. 3. Some 71% of the surveyed people reported a feeling of positive well-being compared to 58.3 % in the following year, Sacco et al., 2020) and increase in life satisfaction (‘an improvement in the sphere of life satisfaction, as the sample agreeing to this amounts to 57.6 %, compared to the 50.3 % of the benchmarking coming from ISTAT, with respect to the geographical area of reference (Basilicata region)’ (Sacco et al., p.3). The Matera ECoC example and the other ECoC examples point out the potential of cultural heritage for citizens’ quality of life.

**Box 5.3 Linkages between heritage and education and skills and contentment and eudemonic**

Interviews with ECoC representatives underline the role of heritage in providing learning opportunities for participants (both tourists and residents) and for staff in the cultural and heritage sector. For instance, in Valletta ECoC interviewed actors argue that the main strength of the ECoC is rooted in the opportunities for knowledge, research and employment. However, as pointed out by Valletta 2018 (2018), a further professionalisation of the cultural and heritage sector is needed to ensure positive impacts. In Wroclaw an increase in competence and skills has been detected in particular for cultural managers and cultural organisations (Sanetra-Szeliga, Purchla, Knaś, Kozioł and Dąbrowski, 2020). An increase in the skills and competence of cultural and heritage professionals has also been detected for Riga, with potential positive effects on the improvement in the quality of the cultural offer of the city. In Umeå, the valorisation of the Saami heritage provided a learning opportunity for residents and other participants both on the colonial past of the Swedish people and on the heritage of the Saami minority. For digital skills, the Plovdiv case shows that higher attention should be paid to the outcome of the digital divide in the cultural sector, including heritage. In Matera, 40 % of the surveyed people consider that ECoC provided them with the opportunity to challenge their knowledge and experience, while 60 % believe that it contributed to improving their skills (Sacco et al., 2020).

For contentment and eudemonic, in Riga 40 % of the surveyed ECoC event organisers attest that the Riga 2014 ECoC has improved the quality of life for the citizens of Riga neighbourhoods. In particular, through grassroots projects, decentralisation of culture and focus on citizens’ quality of life. In the Valletta case, a survey undertaken by Valletta 2018 (2018) shows that more than half of the Valletta residents report that the ECoC makes them feel enthusiastic, lower percentages are registered by participants from areas outside Valletta.

A relation with knowledge and research seems to be present in half of the analysed ECoCs. For instance, in ECoC Valletta the research capabilities were considered one of the main legacies of ECoC.

Life satisfaction and happiness and quality and sustainability of the environment seem to be the quality of life dimensions less related to heritage actions in the analysed ECoCs. A relation seems to be present in five out of the eight analysed ECoCs. The relation with the environment is ambivalent as, pointed out previously. While heritage and culture in general can provide opportunities for learning about and acting for urban sustainability, it can also have negative effects (e.g. increased pollution, gentrification), which could contribute to downgrading the citizens’ and residents’ quality of life.

For factors that foster the potential of cultural heritage in achieving societal well-being, the following emerged from ECoC interviewees and studies:

- **Continuous funding and equality in accessing funding.** Ensuring access to continuous public funding is particularly important for small grassroots organisations that do not have the necessary
capacities to access private market funding or large public funding opportunities. As shown by the Wroclaw case, particular funding tools can be created (e.g. micro-grants). Furthermore, interviews point out the need for ensuring long-term funding to the cultural and heritage sector. ESIF investments can prove particularly useful to this end, and indeed most of the ECoC cities/towns analysed have benefited from substantial ESIF resources, in particular from ERDF.

- **Decentralisation of cultural initiatives** (e.g. creation of cultural access points, creation of mobile cultural venues) and use of innovative cultural resources (e.g. industrial heritage), proved particularly useful for increasing accessibility to and participation in culture and heritage, in particular for marginalised groups.

- **Citizens’ engagement not only as passive users, but also as co-creators of cultural activities**, including heritage, proved particularly relevant for enhancing interest and participation in culture and heritage. Engagement of citizens as equal partners also proved particularly relevant for engaging marginalised groups, and community building.

- **Long-term and integrated and participatory strategies**. Many of the ECoC interviews underline that a long-term planning of cultural and heritage strategies is needed to ensure their contribution to societal well-being. Furthermore, strategies can integrate culture, including heritage, in local development strategies addressing quality of life, urban/rural renewal, social inclusion, education, employment and business creation. The ECoC ones appear particularly effective, especially when they are co-created with citizens and stakeholders.
6 Preliminary policy implications

While in the Second interim report recommendations focused on data sources and indicators, this report focuses on preliminary policy recommendations to enhance the contribution of cultural heritage to societal well-being. The preliminary policy recommendations provided below are based on the analyses carried out so far and the survey and stakeholders’ interview results. Further indications will be provided in the final report based on lessons learnt from the HERIWELL case studies.

Policy at all territorial levels (EU, national, regional, local)

i. Acknowledge cultural heritage not only as an economic driver, but also for societal well-being. Include the heritage dimension in all socio-economic and development policies including education, regional development, welfare, environmental and mobility policies.

The HERIWELL analyses show that cultural heritage impacts positively on both societal cohesion and quality of life, besides on material conditions. All forms of heritage (tangible, intangible, digital, mixed) can play a significant role. Therefore, even though the well-being dimension of cultural heritage has started to be taken into consideration in the cultural field, more has to be done to further expand it and, most of all, it should be mainstreamed to other policy fields so as to maximise its potential. The new ESIF programming period and the Recovery and Resilience Plans represent an opportunity in this respect. In planning and delivering cultural heritage interventions (in particular in the framework of the new ESIF programming period and the Recovery and Resilience Plans), particular attention should be paid to the European Quality Principles for EU-Funded Interventions with Potential Impact upon Cultural Heritage defined by ICOMOS (2018). Furthermore, particular attention should be also paid to CEN TC 346 Conservation of Cultural Heritage.

An increased awareness among policymakers and stakeholders of the societal well-being value of cultural heritage is needed to increase the political will to invest in cultural heritage with targeted funding. Effective multilevel governance systems and monitoring and evaluation tools should be developed to assess, ex ante and ex post, the specific impacts of heritage on societal well-being. This also requires a collective effort across sectors to understand cultural heritage, and in general culture and arts, as ‘ways of enrichment, value, opportunities for professionalisation’ (ECoC interviewees). In addition, it needs a greater capacity of actors from various sectors (e.g. education, regional development, welfare, environment, mobility) to include heritage in broader societal well-being strategies.

ii. Allocate specific and adequate long-term funding to cultural heritage

Despite its societal well-being value, overall, funding of cultural heritage remains rather limited. Therefore, further attention should be paid to increase funding allocated to cultural heritage at EU, national/regional and local levels.

HERIWELL analyses show that heritage public funding schemes play a role in the achievement of societal well-being outcomes. They act as an investments multiplier, attracting other investments in heritage. They often represent the only instrument for delivering complex projects that would not be implemented otherwise. They support small grassroots heritage organisations, crucial for the maintenance of CH at local level. However, they are often not able to attract investments from the private market or to apply to large EU and regional/national funding schemes. They allow free or low-cost access to heritage, in particular to disadvantaged categories, and high costs is one of the most relevant barriers for accessing heritage.

Increase in funding may occur in various ways, based on the territorial level.

- **EU level**: a specific focus should be dedicated to potentiating financing in heritage in all ESIF instruments and in particular in ESF. Allocations here seem to be particularly limited, despite the role of heritage in education and social inclusion – two key objectives of ESF. Furthermore, considering the need to include the heritage dimension in other policies, particular attention should be paid to the heritage dimension in other funding schemes. This has already been undertaken in funding schemes such as the Erasmus + programme, Citizens, Equality, Rights and Values programme (strand 3 Citizens’ engagement and participation), H2020 and specific initiatives (e.g. European Year of Cultural Heritage). However, a stronger consideration of the heritage dimension could be introduced in EU funding schemes dedicated to digitalisation and digital skills (e.g. Digital Europe Programme), gender equality, integration of migrants, fighting social exclusion, health, etc.
- **National/regional level:** overall funding allocated to heritage should be increased in particular paying attention to including the heritage dimension in other policy areas, as identified previously. The Next Generation EU Initiative and the National Resilience and Recovery Plans represent a good opportunity in this respect. Besides public subsidies schemes, other ways to sustain the heritage sector can be implemented at national/regional level (e.g. through tax exemptions, debt financing), as already done in some countries (e.g. France, Italy, Spain), by extending their application and simplifying procedures. As pointed out in the last report, efforts towards harmonising criteria of national CH registers could also be useful for planning support or reacting to demands.

- **Local level:** at this level, particular attention should be paid to sustaining grassroots and small organisations that ensure the decentralisation and sustainability of heritage initiatives. Interesting examples are provided by the ECoC cases presented in Chapter 5.

### iii. Ensure multilevel governance of heritage policies

The valorisation of the societal well-being dimension of heritage, in particular through its integration with other policies, requires a strong coordination between policy actors and stakeholders from various sectors and at various territorial levels. Furthermore, in the HERIWELL analyses (see Chapters 3 and 5 and the Mann case study in Annex 4) citizens’ active engagement proves particularly useful for ensuring sustainability of CH strategies and favouring the contribution of CH to achieving societal well-being. To this end, it is necessary to create coordination mechanisms, tools and places where the different levels/sectors of government and stakeholders (depending on the initiatives activated), including citizens, can interact with each other. Furthermore, and in line with proposals of CH organisations, a particular focus should be dedicated to the empowerment of public administrations to enhance their capacity to advance meaningful participatory policies. This should ensure multilevel coordination taking into consideration the following levels and actors.

- **Micro level: citizens.** HERIWELL analyses (see Chapter 5.3) show that citizens’ participation as co-creators of heritage initiatives are particularly important for achieving societal well-being outcomes (e.g. improved skills, sense of belonging, community participation, trust). However, to be effective cultural participation should already occur at the planning stage of an initiative and should imply paying attention to and questioning the unequal power relations in society (Hudson, Sandberg & Schmauch, 2016). This implies bringing forth the voices of those different from the majority (minority groups, elderly, youngsters from deprived neighbourhoods, socially marginalised groups, etc.) in the design and delivery of the respective strategy.

- **Local level:** The HERIWELL analyses (see Chapter 5.3) show that NGOs, informal citizens’ groups and movements had an important role in the engagement and development of communities and in the decentralisation of cultural heritage initiatives. They also support the access of marginalised categories (e.g. Roma, people with disabilities) to cultural heritage. Hence, particular attention should be paid to their engagement as equal and long-term partners in the planning, delivery and monitoring and evaluation of CH policies. To ensure financial sustainability of CH strategies, attention should also be paid to the engagement of economic actors (e.g. companies). Considering the need for developing integrated strategies of CH valorisation, early and continuous engagement of public, social and economic actors from various policy fields should be ensured.

- **Macro level:** public, third-sector and economic policymakers and stakeholders across various policy fields (cultural heritage, culture and creative industries, education, welfare, environment, mobility, etc.), responsible for regional and national policies relevant for the contribution of CH to societal well-being, should be involved. Particular attention should be paid to ensuring a continuous coordination between the macro level and the local and micro level for making cultural participation meaningful.

- **Global level:** actors engaged in the definition of heritage and societal well-being policies at EU/international level (e.g. EU institutions, UNESCO, umbrella civil society organisations) should

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65 See the OECD report *Culture and local development* (2018) for details.
be involved. Particular attention should be paid to ensuring coordination and continuous dialogue between the global level and the macro level for effective valorisation of the well-being dimension of heritage.

iv. **Harness the potential of digital tools to ensure accessibility of cultural heritage and enhance its societal well-being contribution**

The HERIWELL analyses (see Chapter 3, 5.3 and the Mann case study in Annex 4) show the relevant potential of heritage for both ensuring accessibility to and participation in heritage. Furthermore, it also contributes to favouring societal well-being, such as learning, sense of belonging or social inclusion. In the context of Covid-19 and the subsequent increase in the use of digital tools, a special mention should be made to the potential of digital CH in the educational area (see for instance EHA Manifesto 2020). However, as pointed out by the Mann case study, the contribution of digital CH to societal well-being is conditioned by its inclusion within broader holistic strategies. These are to be assessed and fine-tuned periodically and by strengthening digital infrastructure and capacities in the heritage field and more generally in society. This approach can take different forms at the various territorial levels. For instance, at EU level particular attention could be paid to heritage in the policy and funding strategies on digitisation (e.g. Digital Europe Programme). At regional/national level, specific policies for the digitisation of the heritage sector could be implemented, developing the digital skills of heritage actors and acting as a role model for the private sector (e.g. through the digitisation of state heritage organisations, the creation of digital heritage). At a local level, strategies of digital inclusion through specific projects connected to heritage resources, involving, for instance, schools (education) and local communities should be developed. Besides overcoming the digital divide in the heritage sector, regional/national and local policies should also focus on the improvement of the digital infrastructure and digital skills in ESPON territories to ensure access to heritage.

**Policymaking at regional/national and local levels**

i. **Build the capacities of stakeholders in both the heritage and other societal well-being fields**

The availability of skilled human resources is key for implementing innovative, quality and effective cultural heritage strategies. As underlined by one of the ECoC interviewees, without it, ‘cultural heritage, rather than being treated as an influencer on societal well-being, will be treated like a fossil for protection purposes only (preserved but never truly promoted)’. Therefore, specific capacity-building initiatives should be implemented by both regional and national actors in charge of heritage policies (e.g. ministries, national heritage organisations) and local actors (municipalities, heritage public and private organisations).

Furthermore, regional/national and local public institutions and organisations should also pay attention to enhancing the skills of public and private actors in other areas of societal well-being, to include heritage in broader well-being strategies. This can occur, for instance, through continuous exchanges and peer learning, or creation of mixed working groups. For example, a strategy of fostering a sense of common ownership with residents living close to archaeological (excavation) sites has proved to enhance social cohesion as well as preventing damage or looting.

ii. **Increase information on heritage opportunities**

As pointed out by the HERIWELL survey, the lack of information about opportunities of engaging with heritage represents a relevant barrier in participation in heritage. Thus, it is paramount to increase information on opportunities of participating in heritage. Digitisation can increase information on heritage, as mentioned previously. However, as a relevant part of the population does not use digital tools to engage with heritage, complementary tools have to be designed. An example is the creation of cultural points around the city, in particular in neglected neighbourhoods as envisaged in Riga ECoC (see Chapter 5.3). Communication tools, including social media, could also be used to strengthen and disseminate information on heritage opportunities.

iii. **Increase inclusivity of the heritage sector**

Despite some improvements in gender equality in the heritage sector, as pointed out in Chapter 3 a further effort is needed to ensure gender equality in the heritage field. Reaching a parity in terms of women’s and men’s presence in management positions in the heritage field is only a first step towards equality. Achieving gender equality in the heritage sector should challenge a perceived dominant male culture and power relations existing in society.
Attention should also be paid also to ensure a relevant representation of people with different backgrounds (e.g. ethnic minorities, migrants, people with disabilities) in the heritage sector and in heritage narratives and valorisation strategies, to represent the various identities that form the culture of a people. Other measures could focus for instance on the creation of specific networks on this topic with the aim to use cultural heritage to promote gender equality. This is the case for Catalonia, where a specific example on museums and gender quality exists.

iv. **Increase accessibility to the heritage sector**

Accessibility to heritage remains a relevant issue, as revealed by the HERIWELL survey (see Chapter 3), the ECoC analysis (see Chapter 5.3) and the Mann case study (see Annex 4). Further efforts should be undertaken to strengthen accessibility in particular for certain categories, e.g. people with low levels of education, people with disabilities, women (especially in areas displaying lower levels of equality in household and family care duties), people from rural and remote areas, people from peripheral/neglected neighbourhoods, youth. Accessibility to heritage is a multifaceted concept and attention should be paid to various issues.

- Target heritage opportunities to various categories of people (e.g. valorising the linkages of heritage with modernity).
- Use digital tools to broaden the heritage audience.
- Make heritage (in particular tangible and digital) and heritage activities accessible to people with various types of disability.
- Potentiate reception and services facilities supporting participation in heritage.
- Adopt a pricing policy to eliminate/reduce cost barriers.
- Strengthen the dissemination of information on heritage and opportunities to engage with it.

Attention should also be paid to issues not directly related to heritage, but relevant for access to heritage. These include the transport system and quality of spaces (e.g. cleanliness, safety, walkability) where heritage is located (in particular for tangible heritage). Also, there needs to be adequate digital infrastructure and digital skills of both heritage staff and citizens (in particular for digital heritage). As some of these policies and measures are already in place in a number of heritage institutions, it is recommended to evaluate their outcomes, spread good practices and learn from occasional failures.

v. **Enhance the social and environmental sustainability of the heritage sector to mitigate/prevent negative effects** (e.g. pollution, gentrification, increase in the price of houses, increase in the rent of spaces used by youngsters in the heritage field, contested heritage)

As detailed in Chapters 3 and 5, CH can harm societal well-being, e.g. degradation of tangible heritage, pollution, gentrification, increase in the price of houses, increase in the rent of spaces in the heritage field, social conflicts over the use of the heritage of minorities/migrants and/or of contested heritage. Therefore, attention should be paid to ensuring a social and environmentally sustainable valorisation of cultural heritage resources, especially when creating new buildings or modernising older ones. For social conflicts, as pointed out by Mouffe (2005) cultural activities, including heritage, should ‘bring the voices of the “other” into an agonistic dialogue (…) where conflicting parties recognise the legitimacy of their opponents’ (Hudson, Sandberg & Schmauch, 2017, p. 1541).

**Policymaking at local level**

i. **Concentrate cultural heritage strategies on specific and clear societal well-being objectives and combine heritage resources to achieve them**

The Mann case study (see Annex 4) shows that for achieving societal well-being, heritage strategies should clearly identify the societal well-being dimension(s) on which to focus and combine various heritage resources (e.g. tangible, digital heritage) for achieving them. Furthermore, such strategies should be included in a broader policy framework focusing on societal well-being at local level.

ii. **Decentralisation of cultural heritage**

The HERIWELL survey shows that the lack of cultural heritage opportunities in a neighbourhood or their inaccessibility constitutes a barrier to participating in cultural heritage. However, the ECoC analysis pinpoints
that it can be overcome through decentralising cultural and heritage activities. This can be achieved by creating opportunities of engaging with heritage at neighbourhood level, and in rural areas.

iii. Use of cultural heritage for urban refurbishment and revival of inner areas

As revealed by HERIWELL analyses (see Chapter 5.3) and by a vast literature, cultural heritage and, more generally culture, can be a key tool for territorial regeneration, revitalising cities, towns and neighbourhoods. Cultural heritage is deemed particularly useful for the revival of inner areas. In heritage-led urban regeneration strategies, a particular focus should be put on ensuring their sustainability to prevent/mitigate potential negative social and environmental effects.
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**Interviews**

Representative of Valletta 2018 Foundation, interview conducted in August 2021
Representative of Valletta Cultural Agency, interview conducted in August 2021
Representative of the Municipality of Plovdiv, interview conducted in July 2021
Representative of the University of Plovdiv, interview conducted in July 2021
Representative of the Regional History Museum of Plovdiv, interview conducted in July 2021
Representative of the Department of Political Science of the Umeå university, interview conducted in August 2021
Representative of the Municipality of Paphos, interview conducted in August 2021
Representative of the Foundation ‘Rīga 2014’, interview conducted in July 2021
Representative of the Cultural Administration of Rīga City Council, interview conducted in July 2021
Representative of Wroclaw Culture Zone, former Wroclaw 2016 agency, interview conducted in August 2021
ESPON 2020

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