Territorial built heritage related strategies

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Key definitions and structure of presentation

1. A renewed consideration of cultural heritage
2. Cultural heritage as territorial asset
3. Approaches of cultural heritage management
4. Spatial planning approaches
5. Built heritage in Greece
   5.1 Case study 1, A *classical* top-down approach
   5.2 Case study 2, An *innovative* evolutionary resilience approach
   5.3 Case study 3, An approach based on cultural ES and valuation
6. Conclusions
7. Key challenges and Policy recommendations
Preamble: Culture as viewed by the Cohesion policy

• Culture is at the core of Europe's rich heritage and history and has an important role in enhancing the attractiveness of places and strengthening the unique identity of a specific location.

• Culture and creativity can be important drivers and enablers of innovation as well as an important source for entrepreneurship.

• Culture is a key driver for increasing tourism revenue, with cultural tourism being one of the largest and fastest growing tourism segments worldwide.

• Culture also has an important role to play in promoting social inclusion.

Keywords: attractiveness, place identity, creativity, innovation, entrepreneurship, cultural tourism, social inclusion
Cultural heritage, an invaluable territorial asset?

• Cultural heritage constitutes an invaluable asset from a historical, cultural, social and economic points of view.
• Therefore, it should be treasured and wisely managed in order to avoid loss of place identity, cultural and social degradation, loss of leisure and tourism opportunities, and so on..

• Cultural heritage is a territorial asset, being part of the territorial capital of a city or region
• Directly linked with CH, Cultural Tourism is gaining ground: it accounts for 40% of all European tourism; 4 out of 10 tourists choose their destination based on its cultural offering (EC, 2018).
# 3 approaches of cultural heritage management

Source: ECHOPOLIS 2018 Proceedings

<table>
<thead>
<tr>
<th>3 APPROACHES</th>
<th>Key considerations</th>
<th>Key authority—custodian</th>
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<tbody>
<tr>
<td>Material-based approach</td>
<td>Endorsed by the <em>Venice Charter</em> (ICOMOS, 1964). Expert-driven approach, giving extreme focus on the preservation of the <strong>material/fabric of a monument</strong>.</td>
<td>Conservation of heritage is in the hands of heritage authorities (mostly state-appointed) and the local community is not taken into account. <em>Although considered to be outdated, it is still highly appreciated in Greece.</em></td>
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<tr>
<td>Value-based approach</td>
<td>The current most preferred approach to Heritage Conservation, especially in the US, Canada and Australia. Largely based on the <em>Burra Charter</em> (ICOMOS, 1999), it focuses on the values that society (consisting of various stakeholders) ascribes to heritage.</td>
<td>The <strong>community is placed at the core of conservation.</strong></td>
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<tr>
<td>Living monument heritage approach</td>
<td>The <strong>living dimension of heritage is placed at the core of decision-making</strong> and <strong>continuity is a key theme</strong>. It emerged about 3 decades ago by ICCROM and it was embraced mostly by the non-western civilizations. It links conservation with the <strong>sustainable development of communities.</strong></td>
<td>It recognizes <strong>communities as the true long-term custodians of their heritage sites</strong> and <strong>empowers communities</strong> in the conservation and managing process, so as to benefit from their traditional (and established) values, management systems and maintenance practices.</td>
</tr>
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Spatial planning approaches

• Spatial planning approaches are equally important, to achieve appropriate protection and enhancement of cultural heritage.

• According to Kozlowski and Vass-Bowen*, buffer zone planning (BZP) is considered to be the key approach to fill the gap between conservation and wise management of the cultural heritage.

• Besides, lessons learnt from natural heritage areas confirm that buffer zone planning (BZP) is an ideal method for implementing gradual protection in the surrounding area of a protected space, without hampering any types of activities and development outside its bounds.

In Greece, protection zoning for the monumental and cultural heritage has long been addressed, both by the Ministry of Culture and by the Ministry for the Environment.

On the part of the Ministry of Culture, the most recent legislation (L.3028 of 2002) on the country’s cultural heritage launches two types of protection zones: Protection Zone A and Protection Zone B.

**Protection Zone A is a zone of absolute protection**. It usually includes exclusively and strictly the location of the monument or archaeological site, in which all kinds of interventions and constructions are prohibited.

**Protection Zone B works as a Buffer Zone**, extending to such a distance as to include areas that interact with the monument and its surrounding landscape (so that special planning regulations are applied).
The Hellenic context (2)

• On behalf of the *Ministry for the Environment*, environmental and spatial planning legislation also provides for special zoning for the protection of the built and monumental heritage of the country, although in an indirect way.

• **Special Protection Areas (ΠΕΠ)**, is a special zone that can be used in *Local Spatial Plans (Urban Plans, etc)*, in order to implement very strict building regulations and, thus, achieve protection of the cultural, natural and agricultural landscapes.

• In the past: **Zone for Building Activity Control (ZOE)**, outdated and no longer used.

• **Sites of Outstanding Natural Beauty (ΤΙΦΚ)**, is another special zone, suitable for the protection of built and monumental heritage in rural areas, that was conceptualized in the 1950’s (L.1469) by the Ministry of Culture, but then transferred in the recent past (in 2011) to the Ministry for the Environment, that now has absolute jurisdiction over such zones.
Sites of Outstanding Natural Beauty (ΤΙΦΚ)

Source: Filotis Database (https://filotis.itia.ntua.gr/biotopes/?category=1)
Zoning launched by Greek legislation

### Planning Zones under the jurisdiction of the Ministry of Culture

<table>
<thead>
<tr>
<th>Year</th>
<th>Planning Zone</th>
</tr>
</thead>
<tbody>
<tr>
<td>1950</td>
<td>Landscapes of Outstanding Natural Beauty (competence transferred to the Ministry for the Environment in 2011)</td>
</tr>
<tr>
<td>2002</td>
<td>Protection Zone A and Protection Zone B</td>
</tr>
</tbody>
</table>

### Planning Zones under the jurisdiction of the Ministry for the Environment

<table>
<thead>
<tr>
<th>Year</th>
<th>Planning Zone</th>
</tr>
</thead>
<tbody>
<tr>
<td>1983</td>
<td>Zones for Building Activity Control (ZOE) (outdated zone)</td>
</tr>
<tr>
<td>1997</td>
<td>Special Protection Area (ΠΕΠ) (included in Local Spatial Plans / Urban Plans)</td>
</tr>
</tbody>
</table>
3 case-studies

CASE STUDY 1. The adventure of the settlements of less than 2,000 residents

CASE STUDY 2. Evolutionary resilience applied to the Arkochori traditional village (based on AUTH research)

CASE STUDY 3. The Aegean Archipelago as an “imaginary open museum”
A vast number of small settlements is spread over the Greek territory, despite the fact that almost 2/3 of the Greek population is highly urbanized with 8 urban areas and over half of it concentrating in Athens.

<table>
<thead>
<tr>
<th>Population</th>
<th>Number of settlements agglomerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 100.000</td>
<td>8</td>
</tr>
<tr>
<td>10.000-99.999</td>
<td>137</td>
</tr>
<tr>
<td>2.000-9.999</td>
<td>266</td>
</tr>
<tr>
<td>under 2000</td>
<td>12.761</td>
</tr>
<tr>
<td>Total</td>
<td>13.272</td>
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Settlements of less than 2000 inhabitants

- **Approximately 13,000** settlements of less than **2,000 residents**

- **865** are characterized as traditional with a special framework of protection

- **12,000** present no special architectural interest and **110** are abandoned.
2 Presidential Decrees regulating development in these settlements

• The 1\textsuperscript{st} one was established in 1985 (24.4/FEK181D/1985), was immediately implemented and then modified in 2011. 
  a/ Defines their boundaries
  b/ Sets general building regulations

• The 2\textsuperscript{nd} one was established in 1985 and refers to their urban plans (specify building blocks, transport networks etc.) and was partly applied.

* Urban planning regulations follow the building regulations

• Another important decree (19/10/FEK594D/1978), which specifies the protection of traditional settlements, has been put into force since 1978.

• 400 settlements across the country were characterised as traditional in 1978 and this number was doubled by 2012.
1st Decree for Settlements of less than 2000 inhabitants

Refers to:
1. The classification of settlements in categories
2. The definition of Urban and Morphological Rules of Building and Architecture (building system, height, etc.)

<table>
<thead>
<tr>
<th>6 classification criteria for settlements</th>
<th>13 categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geographical location</td>
<td>Peri-urban, Coastal</td>
</tr>
<tr>
<td>Function</td>
<td>Touristic</td>
</tr>
<tr>
<td>Historical value</td>
<td>Remarkable/ Interesting/ With no interest</td>
</tr>
<tr>
<td>Geometric structure</td>
<td>Compact/Scattered</td>
</tr>
<tr>
<td>Population capacity</td>
<td>Dynamic /Stagnant</td>
</tr>
<tr>
<td>Size</td>
<td>Small/ Medium/ Big</td>
</tr>
</tbody>
</table>
For the classification of settlements in categories, **architectural style reports** were drawn up at Prefectural level, referring to the character/style of each settlement.

Nowadays, there are approximately **4,500 Prefectural decisions** for these small settlements which define only their boundaries and set building regulations **but do not include urban planning provisions**.
The architectural style reports, refer to the external characteristics and elements of the buildings, such as:

• The colouring of the facades
• The open balconies and their position on the facades of the building
• Other external elements (i.e. stairs) with regard to their construction materials.
The Council of the State (Supreme Administrative Court of Greece) for the Settlements of less than 2000 inhabitants

2 important decisions

N.1828/2008 has ruled that it is not feasible to build houses in settlements with simply defined boundaries, i.e without a plan.

N.3661/2005 has ruled that defining settlements with a population of less than 2000 inhabitants is a **general urban planning arrangement** and must be determined by a **Presidential Decree and not by a Prefectural decision.** (this has not been established yet). The approval by a PD is required for public utilities in a defined settlement.

The absence of **urban planning** is a key inhibitor to the sustainability and development of the settlements.
Morphological Rules in Building and Architecture (MRBA) for the settlements of < 2000 inhabitants

2011
the Ministry of the Environment and Energy (MEE) decided the enforcement of Morphological Rules in Building and Architecture (MRBA) for the settlements of <2000 inhabitants.

• The whole programme concerned the allocation of 48 studies for every Regional Unit covering the entire territory (except for the Regions of Attica and Thessaloniki).

• This programme was mostly funded by European Structural funds (ESPA) and partly from the Hellenic Green Fund.
The aim of the Ministry of the Environment and Energy (MEE) was the establishment of a **General Building Framework** for Small Settlements

- covering all the regional units of the country
- aiming to contribute effectively to the integration of spatial planning and to the upgrading of the environmental, architectural, urban and historical character of the settlements.

Morphological Rules in Building and Architecture (MRBA) for the settlements of <2000 inhabitants

2014

The Ministry of the Environment and Energy (MEE) in collaboration with the Panhellenic Association of Architects (SADAS-PEA) and the academia of the Faculties of Architecture organized a conference in which the general guidelines for the preparation of the studies for every Regional Unit were set. At this conference it was discussed that spatial planning at the local level is still at an early stage and should be completed.

Morphological Rules in Building and Architecture (MRBA) for the settlements of <2000 inhabitants
Local Spatial Plans of L.4269/14 (or General Urban Plans of L.2508/97) regulate the territorial region of the municipality, seeking the comprehensive integrated planning of urban, suburban and rural areas for the next 15-20 years, through a combination of development, environmental and social criteria.

FINDINGS

1997–2014: In a total of 910 municipalities (the Region of Attica not included), General Development Plans 16% (144) were approved 31% (285) are ongoing whereas 53% (479) of the municipalities have no G.U.Ps/SHOOAP.
In 2016, the Ministry of the Environment and Energy (MEE) received **29 assigned studies concerning** 29 out of 48 Regional Units (RU) of the country (excluding Attica and Thessaloniki).

In 2016, the Municipalities and other stakeholders were asked to express their views before promoting the institutionalization of the Presidential Decrees for the Regional Units.

*Stakeholders’ view and opinions were requested after the studies were completed and delivered and not during the preparation phase.*

This has resulted in a series of irregularities.

The main problems were in the areas of:
- Land uses;
- Streams and forest land within settlements;
- Overlapping of competences of the authorities i.e., the cases of the settlements that have “double protection” frameworks, both by the Ministry of Culture and the Ministry of the Environment and Energy (MEE).

Despite the initial intention in 2011, the Ministry of the Environment and Energy (MEE) has **neither proceeded to the establishment** of the new general institutional framework for the whole of the small-scale settlements nor has it set rules for each of the regional units until today.

**Although the first 28 studies have been completed since 2016, they have not been implemented yet, nor have the other 20 studies been assigned.**
Conclusions from case study 1

The top-down set-up of morphological rules of building and architecture failed to become a real **TOOL** for the sustainable development of the small settlements.

**Recommendations**

1. Integrate spatial planning at all levels with the ultimate goal of sustainable development of the settlements.
2. A General Building Framework is needed to guide the drafting of new building codes by each Regional unit.
3. The establishment of **rules adapted to regional characteristics** should be **community-based** that is involve the Municipalities and several stakeholders.
CASE STUDY 2: a mountainous old traditional settlement: the Arkochori village
Source: ECHOPOLIS 2018 Proceedings

- Located at an altitude of 600m and relatively close to the city of Naoussa (8km)
- Founded in 1630 and being one of the oldest settlements in the area of Mount Vermio.
- 350 registered residents (2011 census count), with only 20 of them living permanently in the settlement.
- In 1910 the greater area of Arkochori (1600 hectares) was bought by 16 Greek families from the Ottoman ruler.
- The area was divided into 16 subareas, called “ikraria”.
- Each “ikrari” belonged to one (extended) family and a designated leader, usually the first/oldest male member of the family, was responsible for the management and exploitation of the land.
- Furthermore each “ikrari” was divided in several sub areas the “basnes” according to the male members of the family.
- The management of 16 “ikraria” as a whole entity, was based on a co-operative model.
- The main activities developed were livestock farming, cheese making, logging, trade and to a very small extent agricultural activity.
- The community worked on a cooperative basis and commonly managed the valuable natural resources like water and timber.
- This common management and sharing practices created a peculiar and strong sense of community and bonding to the place and impacted the spatial and functional form of the settlement.
The Arkochori traditional village

Source: ECHOPOLIS 2018 Proceedings
The Arkochori traditional village

Source: ECHOPOLIS 2018 Proceedings
A resilient development strategy for the settlement of Arkochori: Vision & Goals

VISION: “Reinvent the nature of the settlement with emphasis on preserving and enhancing its traditional character, aiming at economic, social and environmental resilience”.

GOAL 1 Establish a community-based enterprise system

GOAL 2 Introduce diversity and redundancy of economic activities

GOAL 3 Protect and enhance built environment.

GOAL 4 Promote Community building
Building resilience in the Arkochori village

**GOAL 1: Establishment of a community-based enterprise system**

a) Establishment of a co-operative scheme based on the concept of “ikraria” and local human resources.

a) Promotion of small-scale enterprises based on the family model and the mentality of “ikraria”. The enterprises retain a certain degree of autonomy when at the same time they preserve interdependent relations with other place-based (or not) enterprises.

**GOAL 2: Introduce diversity and redundancy of economic activities**

a) Promote diverse activities with a wide variety of objectives that is related to the agricultural sector. These could include organic farming and organic certified products, livestock farming, place-branding products, etc.

b) Agritourism activities based on a place-sharing concept where the visitors become short term inhabitants of “ikraria” participating in related employment, training and educational activities.
Building resilience in the Arkochori Village

GOAL 3 Protect and enhance built environment

• The settlement of Arkochori presents distinct aesthetical, architectural and urban features that is worth preserving. Measures include:
  
a. protect the morphological characteristics of the buildings.
  b. preserve the morphology of the settlement and its urban tissue, manage future expansions or land development and avoid possible land use conflicts due to new uses in the settlement.
  c. Increase connectivity within the settlement and enhance the links to other growth poles.

GOAL 4 Community building

• Promote Community building though place based economic and social activities. This goal builds upon the existing strong relations of “ikraria” and the strong connections created by the common cultural and religious activities. Measures include:

  a. Organize the local economy, cultural and social activities though a participatory process in all stages of planning ensuring social legitimacy of all decisions, plans and actions.
  b. Ensure that actions and activities are inclusive and refer to the variety of people and their capabilities. The notion is that each person has different kind of assets that are equally valuable and key elements in facing a shock to the system.
Protection and development zones
Conclusions from case study 2

Evolutionary resilience (Davoudi, 2012) offers a new and probably more appropriate framework to describe the nature and processes of agglomerations because of their complex, non-linear, and self-organising qualities.

The spatial strategy for achieving resilient development in Arkochori is inspired by its unique community-based organizational structure and builds upon older patterns, by adding novel elements that mutate and evolve the initial structural and functional organization of the settlement.
Setting the new context for spatial planning: Evolutionary Resilience

Davoudi (2012) introduced the term “evolutionary resilience” as more appropriate to describe the nature and processes within cities.

Evolutionary resilience recognizes three qualities of urban ecosystems:

- Complexity
- Non-linearity
- Self-organization

In this perspective resilience of urban ecosystems is not just their ability to return to its normal or previous state of equilibrium (engineering or ecological resilience) but rather to “change, adapt, and, crucially, TRANSORM in response to stresses and strains”

CASE STUDY 3: The Aegean Archipelago as an open imaginary museum

Source: Research by the Strategic and Maritime Spatial Planning lab/Panteion University

- South Aegean Region is represented by the insular landscape of the Aegean, which led to the formation of its distinctive place identity, either as a global touristic destination or the wild insular beauty of the Aegean or/and the maritime borders of Greece to the East.

- The main challenges faced in relation to CULTURAL TOURISM lie upon the low level of cultural heritage accessibility (both tangible and intangible), translated into limited exploitation of underwater/maritime cultural heritage, the absence of a decentralized governance model, as well as the overlap of work responsibilities in CT planning and the absence of specialized structures and monitoring mechanisms.

- A TIA process application to support identifying and mapping the cultural identity of the Aegean which is defined by the quality of its natural and cultural resources, its inexhaustible natural and cultural capital and the strong cultural impact the area has had over the centuries, thus promoting the Aegean archipelago as an “imaginary museum of global scope”.
More specifically we selected two case studies included in the area of the insular and cross border South Aegean Region, thus setting out to investigate cultural tourism in

a. the micro insular space of the Regional Unit of Cyclades (1st case study) and

b. a large island of the Regional Unit of Dodecanese (2nd case study).

Focus will be put on “maritime cultural heritage” (M.C.H.) and “underwater cultural heritage” (U.C.H.) due to the regional specificities.

- Identification of culturally significant areas.
- Analysis and assessment of cultural ecosystem services using Public Participation GIS
- Based on nexus methodology approach, evaluation of the contribution of cultural heritage significant areas to the tourism added value and development.
- Highlighting of the current governance models with particular reference to governance issues (the role of European, national, regional and local authorities, the role of public and private sector, the participation of other type of stakeholders, top down or bottom up approaches, public and private tourism investments, etc).

CASE STUDY 3: The Aegean Archipelago as an open imaginary museum
Conclusions and recommendations

To interlink territorial and spatial planning strategies with CH

• Focus on new approaches and planning strategies for urban ecosystems

• Reinvent planning practices and tools

• Give Planning a new role that rejects the traditional top-down regulatory and normative approach and embrace the “evolutionary resilience” and “evolutionary governance” ideas

• Cities and territories are not in an equilibrium state nor they evolve in a linear way but are complex, non-linear and self-organising systems.

• Spatial planning should set the framework for successful implementation protecting and preserving existing built heritage through appropriate spatial strategies.
Thank you for your attention!

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