Sustainable Heritage Management - a Matter of National Policies Congruence

by
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Abstract. As today’s resources are more and more scarce and valuable, there is a global growing concern for environment protection, cultural identity preservation across nations, social responsibility, all in the context of economic efficiency. Sustainability comes thus as a necessity for more and more economic activities, tourism making no exception from it. The present paper aims to bring in discussion the issue of sustainable heritage management and its implications upon economy in general, and tourism in particular, with a special focus on Romanian mechanisms that may influence it. Also, the paper presents ways of assessing heritage sustainability and their reflection upon the specific socio-economic environment.

Key words: Heritage, Management, Regional Development, Sustainability, Romania
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1 Introduction

Through all ages, the importance of heritage was proclaimed in different ways: “Heritage belongs to everyone, and protecting and preserving the historic environment is a responsibility shared by every member of society” (Swedish Heritage Conservation Act 1988).

“People value the historic environment as part of their cultural and natural heritage. It reflects the knowledge, beliefs and traditions of diverse communities. It gives distinctiveness, meaning and quality to the places in which we live, providing a sense of continuity and a source of identity. It is a social and economic asset and a resource for learning and enjoyment” (UK Conservation Principles Policies and Guidance for the Sustainable Management of the Historic Environment, 2008).

In a similar way, Graham was referring to heritage as being a part of a nation’s past which is partially interpreted for today’s society consumption (Graham, 2002). Every country has its own heritage. The way a nation takes advantage of this depend of national politics. Through heritage one can understand landscapes, buildings, collections, but also tradition, language, culture, music. (Investing in Heritage – a Guide to Successful Urban Regeneration, 2007).

In Romania, The Ministry of Culture published a document “A strategy of Cultural Patrimony 2008-2013”, in which they identified the following as contributing to cultural heritage: archaeological and architectural monuments (immobile heritage), museums, archives and collections (mobile heritage), urban and rural cultural landscapes (immaterial heritage).

2 The Economic Influence of Heritage Management

The national heritage is more than history preserving, as it plays a major part in social and cultural evolution of community (Beautiful Romania Project, 2009). The measurable effects of heritage management upon economy reflect first of all upon the number of jobs created in the area.

As heritage management involves planning and execution of the necessary structures that will give the place its historical, cultural, traditional and emotional uniqueness, specialized workforce and trainings are needed for heritage rehabilitation, promotion and for managing and taking care of it along time. Studies of heritage preservation impact upon economy show, for example, that in the state of Georgia from USA for every million dollars of automobiles production 3.5 jobs are created; manufacturing a million dollars worth computers creates 4 jobs, constructing new buildings generates 14.9 jobs, while a million dollars rehabilitating an heritage building generates 18.1 jobs.

Another analysis performed in Norway showed that heritage building rehabilitation creates 16.5% more workplaces than a new construction project. The
analysis states that every direct workplace in the cultural heritage sector creates other 26.7 derived jobs, when compared for instance to the auto industry where the ratio is only 6.3 to 1. (Rypkema, 2010)
The local area revival and small business development, along with heritage related tourism growth are other economical dimensions of heritage management.

3 Heritage Tourism

The heritage assets are strongly interconnected with the local development reflected in the overall national economic growth, as tourism sector takes a great advantage of it. Heritage tourism is one of the most important segments of tourism, as the different facets of heritage strongly influence the different types of tourism, be it religious, cultural, architectural eco-tourism. However, the research shows that the revenues resulted from tourists visits of the heritage assets themselves are very small (only 6-10 %) when compared to their overall expenses of the trip. That is because, besides the effective visit to heritage sites, tourists spend money on accommodation, restaurants and other services, they go shopping and so on. Because of political, social, religious and environment related reasons not every site having heritage assets is a good choice for introducing it into a heritage tourism project, as heritage assets are in themselves unique and, therefore, exposed to use and damage. In order to manage and protect heritage in a sustainable manner, a long term strategy should be considered so that future generations may benefit too from the cultural, social and economical benefits.

Heritage sustainable management is a win-win situation, as the visitors benefit from their unique experience given by the individuality of heritage and the local community benefits from a proudly social cohesion, investments and economic flourishing. (Rypkema, 2010)
The first step in heritage tourism development is to determine current resources that would support heritage tourism. Dallen and Boyd (2003) explained that, in order to contribute to tourism development, heritage management needs to be carefully understood as being under the influence of a complex system of factors. These refer to assessing the already existing historic and cultural tourism attractions, but also to the possibility to include new ones in the program of heritage management for touristic purposes. This extended analysis has to focus on the whole existing and potential heritage touristic resources, be them tangible (buildings, landscapes, architecture, people) or intangible (history, lifestyles, sense of community, structure of society, tradition and values).

The results of this analysis are the foundation for a rigorous planning of the sustainable heritage development. Next, the target segments of tourists have to be identified, the appropriate facilities and services designed and, based on these, a sustainable project be developed. Such a project will produce the economic effects planned, as the landscape and buildings construction or renovation, associated events and services will increase the rate of employment and the general economic activity in the area. Similarly, training for the new employees going to work in the future touristic facilities associated to heritage sites will contribute to the development of training services providers.

4 Heritage Preservation in Romanian National System

At a national level, the resort ministries must work together for preserving and turning into profit the national heritage. In Romania’s specific situation, this involves a series of policies issued by the Ministry of Culture and National Heritage, the Ministry of Regional Development and Tourism, the Ministry of Labor, the Ministry of Environment. In order to define the strategic lines that will lead to such sustainable long term profitable heritage regeneration, a strong collaboration among these is needed (see Figure 1).
Heritage assets are not only one nation’s preoccupation for management and preservation; in some cases, elements of heritage are a concern for other states too. In Romania, one such example of cooperation across Romanian boundaries is the preservation of Sulina Public Library, important for both local community and also for the Greek heritage of civilization, the building having a great historical charge. (Beautiful Romania Project, 2009)

The role of local municipality is to plan and involve in economical, social and cultural projects for local community. However, planning for heritage rehabilitation and exploitation in the purpose of sustainable community development often requires strong, effective partnerships at regional and national level. Regardless of the national policies of a country, the local authorities will play very important part in the management of the heritage. (Stubbs, 2004).

The value of a sustainable heritage management has to be perceived through its economic aspect, but also from a cultural point of view. Preserving and promoting the heritage offers the premise for a harmonious development of local communities, while culture is perpetuated from one generation to another across time.

5 Sustainability in Terms of Heritage

The concept of sustainability is at its beginnings in Romanian economic activities. One of the world’s most efficient and developed systems in what concerns heritage sustainable management and heritage tourism belongs to Great Britain. The UK strategy on sustainable development integrates economic growth, careful use of natural resources with environment protection and social responsibility (Stubbs, 2004).

Sustainability may also be addressed through the care about mankind’s capital

- the natural capital: the environment and its biodiversity, which are essential to the living and providing the raw materials for development;
• society and culture: the entire system of rules and values that allow human interaction, culture and tradition; the care about human capital;
• human capital: permanent development of knowledge, skills, as well as fulfilling human spiritual needs.
• built capital: architecture, transport, machines, technology, infrastructure and related services. (Constanza et al, 2011).

Sustainable heritage tourism involves finding that harmony between economic competitiveness, nature, culture, history, architecture heritage preservation and the environment that will make the development sustainable also for the next generations. (Nistoreanu, 2011).

The lack of this equilibrium among heritage preservation and economic, social, cultural aspects has often lead to the irreversible decay and destruction of heritage assets along time. (Loulanski and Loulanski, 2011).

A sustainable heritage management will take into account heritage preservation in the framework of economic, social, cultural and biological systems development (Throsby, 2003).

Places of heritage are potentially massive drivers of local tourism development, be them historic cities, monuments, cultural, archeological or folklore sites. It is because national heritage places transmit a special and unique emotional charge to people.

From the social and cultural point of view, a sustainable management of heritage brings the local communities a sense of being in contact with something special, with strong roots. Also, people enjoy living in or nearby heritage sites, as these provide their community an important source of income. Often, the local community manifests a strong cohesion, which leads to an involvement in the heritage related cultural and social events or projects. Also, heritage tourists generally spend more time and money in places that are considered national heritage, than regular travelers (Travel Industry Association of America, 2002). It is because everything that is connected to places of heritage – hotels, restaurants, clothes, souvenirs etc, receives a strong unique identity and consequently a higher market value.

6 Assessing Heritage Sustainability

According to Loulanski and Loulanski (2011) economic sustainability determines the social sustainability which creates the premises for cultural and environmental sustainability; accordingly, sustainability dimensions should be regarded as being interdependent, working in a system as a whole.

Sustainability involves that resources are prudently used, while cultural identity is preserved (Rodwell, 2003). However, the level of sustainability is difficult to quantify and a common platform of sustainable implementation and assessment hasn’t been agreed yet among scholars and specialists (Tao and Wall, 2009).

Thus, in what regards a successful implementation of a sustainable heritage preservation project, Bizzarro and Nijkamp (1998) acknowledged the importance of several factors like: the hardware – referring to machines, IT&C, infrastructure, the software - information systems software, socio-economic data, the “eco-ware” – referring to environment protection policies and mechanisms, “fin-ware” - referring to economic strategies and financial policies and investments, and “org-ware” – the structures involved and their capability to ensure the necessary resources, the planning, implementation and evaluation of the heritage management program.

Similarly, Stubbs (2004) suggested a system of indicators to assess the heritage sustainability. These address the environmental related issues (building efficiency, visitor mode of travel, climate change adaptation); social and cultural related issues (the civic pride and sense of place, art and culture promotion); economic related issues (financial resources, employment) and generic issues (perception and evaluation) - see also Table 1.
Table 1. A framework for developing indicators of historic sustainability (Stubbs, 2004)

<table>
<thead>
<tr>
<th>Topic area</th>
<th>Issue to appraise</th>
<th>Criteria for appraisal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environmental</td>
<td>Building construction/</td>
<td>• Measurement of carbon emissions and energy efficiency</td>
</tr>
<tr>
<td></td>
<td>Energy efficiency</td>
<td>• Compliance with building methods/techniques</td>
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<tr>
<td></td>
<td>Visitor mode of travel</td>
<td>• Ability to harvest environmentally benign energy e.g. wind—biomass—solar</td>
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<tr>
<td></td>
<td>Climate change adaptation</td>
<td>• Split between car/non-car based modes</td>
</tr>
<tr>
<td>Social and cultural</td>
<td>Civic pride and sense of place</td>
<td>• Policies/aspirations to create ‘modal shift’ in favour of public transport</td>
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<td></td>
<td>Social inclusion</td>
<td>• Appraisal of physical change</td>
</tr>
<tr>
<td></td>
<td>Community</td>
<td>• Association with a place or artefact</td>
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<tr>
<td></td>
<td>Virtual heritage</td>
<td>• Ability to engender skills—self-esteem</td>
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<td></td>
<td>Arts and culture dimension</td>
<td>• Links to education and learning in the community</td>
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<tr>
<td>Economic</td>
<td>Financial resources</td>
<td>• Visits to Heritage websites and appraisal of relevance of such sites</td>
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<tr>
<td></td>
<td>Employment</td>
<td>• Promotion of leisure and arts-based programmes</td>
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<td></td>
<td>‘Multiplier’ effect</td>
<td>• Resources available to heritage projects</td>
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<td></td>
<td></td>
<td>• Employment created by heritage sector</td>
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<tr>
<td></td>
<td></td>
<td>• Wider benefits of visitor/tourist to local and regional economy, to include impacts on investment/regeneration</td>
</tr>
<tr>
<td>Generic</td>
<td>Perception/evaluation</td>
<td>• Public/visitor understanding and awareness of the heritage sector and links to sustainability</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Appraisal of relevance of heritage sector to everyday lives</td>
</tr>
</tbody>
</table>

Romanian ministries and institutions involved in heritage management projects lack also a unitary system for assessing their specific sustainability. The benefits of having such a system are obvious, as the framework for assessing heritage sustainability through clear and objective indicators are obvious. Driven by the short term economic gains, heritage management projects – most of them with echo in tourism development, lack the long term perspective given by a careful control of environment, culture and society impact through set and clear assessment criteria. Breaking apart the economic problems from the environmental, social and cultural context places barriers against the sustainability of the project.

Conclusions

The matter of sustainable heritage preservation is a very significant one, as heritage is the key to a healthy, sustainable tourism and to the regional development. The advantages of heritage management project address not only the economical benefits of the local communities and of a nation implicitly. Research has shown that heritage projects produce obvious benefits in what regards the number of workplaces it creates compared to other economic areas of investments and, also, the local development of small and medium enterprises that offer a variety of services related to heritage sites. However, there are long term advantages, other than economic ones. Due to the fact that some heritage assets are very fragile and vulnerable, not all of them are susceptible for being also touristic objectives. However, the most of existing heritage – elements of architecture, archeology, pieces of science, art and culture, living people, traditions and craftsmanship, landscapes – are values of mankind that need to be opened for mankind. In defining heritage tourism strategies through a sustainable management, the interests of all stakeholders have to be taken into account. Thus, there should be taken into account not only the heritage assets themselves and their
expected economic benefits, but also the local community way of life and their traditions, the environment protection.

Planning such a project and bringing it to life needs appropriate control at every stage, with clear goals and indicators. Despite the importance of the issue, though various alternatives were proposed among scholars, there has been not created yet a common system for assessing the fulfillment of sustainability criteria in heritage management projects.

Romanian first steps in heritage management projects have been made. However, the mechanisms of developing such projects are complex, involving several ministries and institutions, each of them with their own policies and rules. More than just a regular management, a sustainable approach of Romanian national heritage assets is needed. Attaining sustainability in all national heritage management projects is a issue of national governance, which can be reached only with the support a comprising, adequate and efficient national system of indicators for sustainability.

References


Author Description

Gabriel Cristian Sabou is a PhD candidate is Business Administration, his specialization being in Economics and Geographical Information Systems for Territorial Planning. Currently works as a project manager for tourism, cartography and ecology areas.