

**Bridging theories, strategies  
and practices in valuing  
cultural heritage**

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edited by Mara Cerquetti

ECONOMIA **(vs)** CULTURA?





# Bridging theories, strategies and practices in valuing cultural heritage

edited by Mara Cerquetti

eum

Economia vs. Cultura?  
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**CULTURAL HERITAGE**  
A CHALLENGE FOR EUROPE



**SMART  
VALUE**

### *Smart Value Project*

#### *Scientific Modern Analysis of Research Topic*

*Values and valuation as key factors in protection, conservation and contemporary use of heritage – a collaborative research of European cultural heritage*

<http://www.smart-value.eu/index.php>

Consortium coordinator: Lublin University of Technology, Lublin, Poland

Partners: Vilnius Academy of Arts, Vilnius, Lithuania; Politecnico di Milano, Milano, Italy; University of Macerata, Macerata, Italy; Altravia s.r.l., Rome, Italy

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<http://www.jpi-culturalheritage.eu/>

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WP4 – Application of the SMART Values methodology in pilot projects

The volume collects the experience of national stakeholders in valuing cultural heritage and the perspective of the international partners involved in the project.

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## Introduction

*Bridging theories, strategies and practices in valuing cultural heritage* is published within the framework of the international scientific project *Smart Value* (Scientific Modern Analysis of Research Topic; Values and valuation as key factors in protection, conservation and contemporary use of heritage – a collaborative research of European cultural heritage<sup>1</sup>), that aims at creating a research consortium with the purpose of summarising the state of knowledge and experience as well as of creatively developing a methodology for analysing the value of the preservation, enhancement and sustainable modern use of cultural heritage. The project is co-funded by the JPI (Joint Programming Initiative) – JHEP (Joint Heritage European Programme) – Joint Pilot Transnational Call for Joint Research Projects on Cultural Heritage<sup>2</sup>, with the support of the Italian MIUR (*Ministero Istruzione, Università e Ricerca*), and involves partners from three different European countries: Poland (Lublin University of Technology, consortium coordinator), Lithuania (Vilnius Academy of Arts) and Italy (Politecnico di Milano, University of Macerata and Altravia s.r.l.).

This publication is one of the outputs of the WP4 (Application of the Smart Values methodology in pilot projects), of which University of Macerata is in charge. The volume brings together the perspective of the international partners involved in the project on value and value assessment and the one of some key stakeholders in the evaluation of cultural heritage at a national level<sup>3</sup>. In order to *build a bridge* between theories, strategies

<sup>1</sup> <<http://www.smart-value.eu/smartvalue-project.php>>, 20.06.2017.

<sup>2</sup> <<http://www.jpi-culturalheritage.eu/>>, 20.06.2017.

<sup>3</sup> The experiences carried out by national stakeholders were also presented and

and practices, it provides a common ground of discussion for academicians, policy makers and professionals, by comparing: (1) models and methodologies elaborated by the academia to measure and evaluate cultural heritage value; (2) national and international policies and plans; and (3) best practices in the management of cultural heritage, sites and institutions. To that end, the book is divided into three sections.

The first section (*Theories*) is mainly theoretical and collects papers from the partners involved in the project.

Bogusław Szmygin, who is the project coordinator, discusses heritage value assessment as a critical issue in cultural heritage protection, due to the vast differentiation of properties considered as heritage, the great diversity of values represented by the heritage, the various circumstances in which the valorisation is performed and the divergence of stakeholders involved in this process. Therefore, there is no one universal method that could be used in heritage protection. Aiming at developing a holistic valuation methodology that will enable the perception and analysis of cultural heritage within the overall context, the author suggests a model diversifying the valorisation system into two levels (stages): 1) level 1, the historic monument value assessment, that is the overall value of the monument (without indications for its protection); 2) level 2, the analysis of the value of the historic monument, that is the assessment of the value of the elements of the monument or the identification of values attributes (in order to determine the forms of its protection and the range of possible intervention).

Alfredo M. Ronchi introduces the concept of “axiology” in the domain of heritage, outlining the notion of “values” related to heritage in a broad sense and of the other different elements actively contributing to the overall appreciation and fruitful exploitation of our legacy. The main focus of his paper addresses the digital platform designed and implemented in order to actively

discussed in a workshop held in Macerata on the 25<sup>th</sup> of May 2017, aiming at boosting the dialogue between academicians, policy makers and professionals operating in the field of cultural heritage management. See: <[http://www.smart-value.eu/docs/Locandina\\_WorkshopSMARTVALUE.pdf](http://www.smart-value.eu/docs/Locandina_WorkshopSMARTVALUE.pdf)>, 20.06.2017.

manage the different values associated with heritage assets. A short description of the platform logic is provided including its main modules and functions. Future developments are described in detail, including the basic architecture of an enhanced platform designed in order to fulfil user's expectations in the near future.

Vaida Ščiglienė, Vaida Almonaitytė-Navickienė, Kristina Daubarytė, Ieva Kuizininė and Angelė Čepėnaitė provide the reader with the Lithuanian perspective through a case study. They focus their attention on Panemunė Castle as «a case of the Lithuanian heritage preservation when a property receives adequate management and is in use». Panemunė Castle is a heritage property belonging to the Vilnius Academy of Arts (VAA), the institution of higher education, actively involved in the processes of the Lithuanian cultural policy. The research examines this heritage object in the entirety of its values and their impact on the environment, with a possibility of their synergism for the benefit of the place. The analysis of the different facets, both one by one and collectively, leads to the conclusion that the social, cultural, artistic and economic values of Panemunė Castle as a heritage property influence their environment, but are not experienced as a powerful driving force of the contemporary heritage protection. The process remains fragmented, sporadic and underdeveloped, with its elements failing to achieve synergism for the place.

In line with this approach, Mara Cerquetti focuses on the museum sector, highlighting the need for an open and holistic method to measure the value that museums have to create in current society. After reviewing the different typologies of cultural heritage value examined by the international economic literature, the research shifts its focus from heritage value assessment to public value creation and measurement. In particular, when reviewing different typologies of value, values are understood not only as the cultural heritage's attributes (e.g. cultural and economic, use and non-use, etc.), but also as a set of utilities or benefits for different recipients. Subsequently, by approaching value creation through a multidimensional and multistakeholder perspective, the analysis focuses on tools and indicators to measure and evaluate museum performances. Finally, sharing

suggestions arising from the public value approach, some recent innovative frameworks are discussed. Their application to the cultural sector is pointed out, underlining critical issues that museums – especially small institutions – have to face, due both to the difficulties in the collection and selection of indicators, and to the lack of adequate skills and competences to approach strategic management.

Concluding the first part of the volume, Maria Luisa Saviano and Marta Maria Montella expand this open, dynamic and holistic perspective, investigating issues of enhancement and sustainability in cultural heritage management. In particular, some aspects of particular importance are highlighted: 1) enhancement and value are multi-dimensional concepts whose interpretation implies the definition of the viewpoint adopted in the evaluation process (perspective of the observer); 2) value is not intrinsic to goods but dynamically emerges from interaction, especially with the users; 3) even the concept of sustainability cannot be generalised, and requires a context of reference and a perspective of observation. Therefore, a conceptual and theoretical framework based on the adoption of a systems perspective is adopted and, in particular, of the *Viable Systems Approach* (vSA), an Italian research stream which applies the principles of systems thinking to the study of business management issues. By building upon CSR (Corporate Social Responsibility) and ST (Stakeholder Theory) research streams, the methodological approach frames the issues of CHM (Cultural Heritage Management) more effectively, making them more effective, efficient, and sustainable on both a theoretical and a practical level.

The second part of the volume (*Strategies*) shifts the attention to international and national strategies to improve the culture of value and evaluation in the cultural sector.

This section is opened by Annalisa Cicerchia (Culture Action Europe), who investigates both qualitative and quantitative approaches to assess the impact of cultural practice and participation on health, with reference to recent international research projects. After examining the role of health and culture in some recent well-being measures such as OECD's Better Life initiative (Measuring Well-being and Progress) and Istat's

Equitable and Sustainable Well-being (BES – *Benessere equo e sostenibile*), the author discusses die-hard dichotomies and slippery definitions (measurement, impact and culture). This last section of the paper briefly introduces «three examples of cultural heritage-based activities specifically designed for generating impacts on the health of those taking part in them»: 1) the project “Art in Your Hands”, launched in the spring of 2012 by the Education Department of the Marino Marini Museum; 2) the activity carried out by the University of Bologna and the Santa Croce Hospital in Cuneo, involving a cultural cooperative, Kalatà, at the Santuario di Vicoforte (Cuneo); 3) the AS Film Festival, now in its 5<sup>th</sup> edition, which takes place every year at the MAXXI – *Museo Nazionale delle arti del XXI secolo* in Rome.

The paper by Alberto Garlandini, Vice President of ICOM, follows. The author examines and discusses different international documents «which are now a global reference not only for museums’ management but also for protection and promotion of cultural heritage». After discussing the museums’ ethical approach to social change and cultural diversity, he points out the importance of soft laws, operational standards, guidelines and codes of ethics in implementing international values, norms and procedures. Subsequently, he provides three recent examples of the greater attention paid by international law and authorities to diversity, cultural heritage and museums: the ICOM Code of Ethics for Museums, UNESCO’s 2015 Recommendation on Museums, the United Nations Security Council’s Resolution 2347 (2017) on cultural heritage protection in security and peacekeeping missions, the Joint Declaration of the Ministers of Culture of G7 in Florence. In the last part the author also introduces two examples of national laws recognising ICOM’s values: the 2014 Reform of the Italian State Museums and the German 2017 Law on the Protection of Cultural Heritage.

Standards and quality culture are also the main focus of the paper by Antonella Pinna, a member of the Italian working group in charge of updating the document “Uniform Quality Levels for the Enhancement of Museums”. The author focuses on the Italian museum system, considering minimum national standards for museums as core standards for citizenship. She goes

over the Italian debate on this topic and its subsequent theoretical and practical developments and formulations, pointing out the uneven results of the application of museum standards. The ministerial reform of state museums has recently brought the focus of attention back to the objective of ensuring uniform levels for the enhancement of cultural institutes. The formulation of uniform quality criteria and parameters for services, essential for monitoring and evaluation, must not neglect the opportunity of having an effect on the evolution of Italian museums as vital areas for building citizenship and raising the quality of life.

Finally, Ludovico Solima provides the reader with some remarks on the meaning of museum accessibility and audience development, «currently one of the focal points of the national and international debate, in the light of the relationship linking museums to their real and digital visitors». Moving from these assumptions, the author focuses his analysis on a recent experience carried out by the National Archaeological Museum in Naples (MANN), which has launched several activities with this purpose, including the creation of a video-game set at the museum, as «one of the first attempts, worldwide, to create a link between the gaming industry and museums, an aspect of museum management still completely unexplored».

The third and last section (*Practices*) firstly presents two different experiences – selected among the winners of the Premio Riccardo Francovich (editions 2016 and 2017) –, that could be considered as best practices in the heritage sector because of their positive results in achieving relevant socio-economic goals: audience development, citizen engagement and sustainable development.

The Poggibonsi Archaeodrome, presented by Marco Valenti and Federico Salzotti, is a project backed by the Siena Museums Foundation and the City of Poggibonsi, that started in 2014 with a small share of public funds. The project pursues an in-progress full scale reconstruction of the 17 structures found during the excavation of a Carolingian Age village in Poggibonsi, aiming not simply at rebuilding features, but at creating «a real “Archaeodrome experience”, making it a place where people can learn

while having fun, getting in direct contact with the materiality of history by living and experimenting it». The Poggibonsi Archaeodrome, that is now managed by Archeòtipo srl, has witnessed an immediate success in terms of visitors and followers, as well as gaining the attention of national and local mass media.

The second experience illustrated in this section is that of the San Gennaro Catacombs in Naples, an excellent example of how the enhancement of cultural assets could «help to modify and stimulate the local community to emerge from years of cultural and social isolation». It is a bottom-up experience, born in 2006 from a group of highly motivated young people to renovate Rione Sanità (Naples), bringing together their strengths and experiences at the service of the community, “not to change city, but to change *the* city”. Thanks to the social co-op “La Paranza Onlus” the early Christian catacombs were salvaged from neglect and given back to the Neapolitans and to the thousands of tourists who come to visit them every year from all over the world. Positive effects generated by this experience concern the employment of young adults and the settlement of new economic activities in the same area.

This section is closed by the presentation of the activity of ICOM Marche, a key local stakeholder of the University of Macerata, supporting museums in the Marche Region. Romina Quarchioni, coordinator of ICOM Marche, presents some editorial projects developing the topic “Museums and Cultural Landscapes” and the project “Adopting a museum”, «a major initiative aimed at supporting the 34 museums damaged by the earthquakes that struck the Lazio, Marche and Umbria regions on August 24<sup>th</sup>, October 26<sup>th</sup>, and October 30<sup>th</sup>, 2016».

The Smart Value project is still ongoing. This work reveals that there are different notions of value as well as different cultures and traditions underpinning *theories*, *strategies* and *practices*. Their further cross-fertilisation is strongly desired in order to share a common framework to assess and evaluate cultural heritage value and cultural activities.

Mara Cerquetti  
Steering Committee Member



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The volume brings together the perspective of the international partners involved in the project and the one of some key stakeholders in the evaluation of cultural heritage in Italy.

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