

Report from meeting in Oslo November 21.-22. 2013

Participants

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1. General presentations on status in each country

Each country gave a short presentation of principles and status of protection and policies for use and ownership.

Norway

The project on national protection plans is nearly completed. Approximately 470 buildings (of totally 2600 in the portfolio) are expected to get protection orders. Parallel to this, another project is organized, producing management plans for all the buildings and outdoor areas to be listed. This project will run for another four years. A short description of the structure of the management plans is enclosed at the end of this document. Apart from the use of these management plans, heritage properties are managed by the same system as other properties.

In June, the board of directors in Statsbygg approved the new strategy for cultural heritage properties, defining aims and guidelines for management, use and development in balance with conservation of heritage values. Two points from the strategy are interesting in this context. First, ownership questions on heritage properties leased on ordinary terms should as a main principle be dealt with like for any other property. Second, Statsbygg will develop concepts and plans for properties where there is a risk of losing our state tenants.

Netherlands

About 1800 objects and sites are protected according to the cultural heritage Act of 1988. This includes archaeological sites. The state is expected to act as a role model. Policies are based on the principle of conservation through use. In other words, state ownership is not considered a prerequisite. Only properties used by the state are kept in state ownership, others should be sold according to the policies.

Finland

Senate properties get their orders and tasks directly from the government, but the funding comes from the state enterprises that lease the properties. Ownership is mainly organized in three enterprises¹; Senate Properties is the one dealing with buildings. (The other two are responsible for land properties and infrastructure.) Decisions on ownership are based on strategic assessments of the user and the character of the

¹ Four other state entities own some properties, but this is only a small percentage of the total state portfolio.

building (significance for history of the state). Any property with no or little strategic value may be sold if this seems rational by economic criteria. Heritage properties are managed according to general management strategies.

Belgium

The state property agency has no special strategy for cultural heritage properties. The total portfolio is 8,4 million sqm, about 10% of this (280 buildings) is cultural heritage. The competence on heritage protection and management is organized in the three regions of Belgium.

Latvia

The total portfolio is 1 mill. Sqm. About 40% is cultural heritage – 130 buildings. They are all used by the state. Funding for management is based on rent, but projects may get grant funding through the state budget.

Sweden

The portfolio consists of castles and other cultural heritage properties, and government buildings. Funding for management is mainly based on rent, also for the total of the portfolio of properties with heritage value. A smaller part of the portfolio is grant financed due to lack of state users – e.g. castles - and the agency SFV may let them to private tenants. Still, the rent they pay covers only a minor part of the cost for management, operations and maintenance.

2. Principles for describing and discussing case properties

The Netherlands presented a proposal on principles and criteria for presenting and comparing case studies:

The slide is titled "Proposal for agenda 22 november" and features a small logo on the right. It is divided into two columns: "Information in each case:" and "Structure how to compare cases:". The left column lists six items under "A. Case", and the right column lists five items under "B. Problems of business case" and "C. Strategies".

Information in each case:	Structure how to compare cases:
A. Case	B. Problems of business case
1. General description of case	1. kind of problem
2. Location, urban context, m2, (building) typology	2. source of the problem
3. Heritage value	3. portfolio category
4. Use (former and possible), stakeholders	4. Etc
5. Financial business case	C. Strategies
6. etc	1. Goal of strategy
	2. How to reach it
	3. Success criteria
	4. Choises
	5. etc

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The criteria were discussed, and different alternatives for describing and comparing cases were proposed

- Quantitative mapping; each country describes 10 cases through a limited set of data and descriptions
- Qualitative mapping, based on just one case from each country, and emphasis on discussions around these

- c. A combination of the two; first a simple quantitative survey, then a discussion on which cases seem to be the most interesting from each country, followed by a more detailed discussion on these

3. Case presentations and discussions

<p>Belgium: Valorization of cultural heritage properties</p>	<div style="text-align: center;"> <h2>Valorisation Project</h2>  </div> <ul style="list-style-type: none"> - Cost-benefit analysis - Definition of the possibilities - Segmentation of the buildings, activities (and applicants) - Decision: in-house or outsourcing - Marketing - ...
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Belgium presented a topic defined by an approach or an aim, not limited to one special property. The aim is to make heritage properties more profitable, in order to be able to invest more in the maintenance and renovation of the buildings. Several examples were illustrated. The discussion showed that the working table found the presentation very interesting, and a conclusion was that this aim and possible approaches could be discussed as part of the proceedings of the working table.

<p>Latvia: Daugavpils fortress</p>	<div style="text-align: center;"> <p>Hope see you soon again with more good news. Perhaps in Daugavpils Fortress.</p>  </div>
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Situated far south in Latvia, the Daugavpils fortress represents a huge challenge with its large volume in a region with small population and lack of economic driving forces. The state owns 29 of the 83 buildings, and their technical condition is bad. Due to this, many people have little faith in possibilities for development. The state now tries to use two completed restoration projects as examples to promote the potential of the property.

Discussion pointed at the size of the area, and the need to regard this as a long term development area which should be connected to a long term strategy for regional development. In this sense, it is clearly different from what is usually meant by property development – limited projects completed within a few years. Approaches from town planning and regional planning could be used to structure and support the process.

<p>Finland: Kaartin Maneesi</p>	<p>A grey zone property for sale or to keep and develop</p> <p>KAARTIN MANEESI</p> <p>This Property have in ineffective use already for years. Military use (storage) ends during this winter.</p> <p>Larger repairs is needed in near future in any case.</p> <p>Location is very good but it has been difficult to find anyother governmental use.</p> <p>Only possible is use as a museum.</p> <p>Chance to succeed in development</p> <p>+ Very good location. (500 m from the Esplanade)</p> <ul style="list-style-type: none"> - Current city plan for public buildings. - Large building, becomes expensive. - Only developers might be interested. - Difficult building – difficult to find users.  
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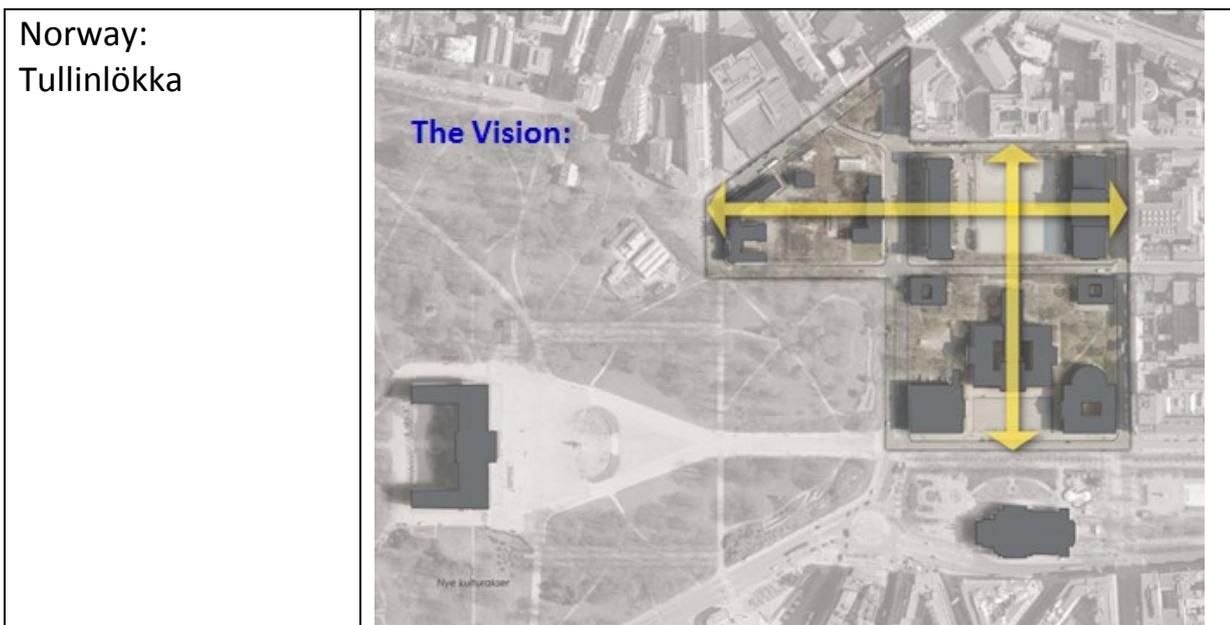
Like the Latvian case, this property must be considered as part of a larger context to find possible strategies for development. The building is large, but outdated compared to the demands of today’s society, and major repairs must be financed. The problem is lack of state tenants. Normal procedures in such cases will be sale on the market, and a private developer might find a potential for a property with this central location. In the discussion, other alternatives were suggested. However, it proves hard to find state users with suitable space requirements and funding. A long term strategy based on an updated city plan might be desirable; the general development pressure in the area should sooner or later increase the demand and make the property attractive. Still, short term solutions for the funding of necessary repairs must be found.

<p>Sweden: Bäckaskog castle</p>	 <p>Gray zone – Bäckaskog Castle</p> <p>STATENS FASTIGHETSVÄRK</p>
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This medieval monastery in the south of Sweden is let to a family that runs a hotel with conference facilities in the historic buildings. The property also includes a farm stead with agricultural land. The main challenges are related to the question of future ownership principle and structure, and how to ensure the protection of heritage values.

Discussion showed some alternative possibilities. and whether the property should be handled as a whole, or if the monastery buildings could be separated from the agricultural parts. On one hand, running a hotel, restaurant and conference facility has little in common with cultivating agricultural land, and you rarely find the same person doing both. This speaks for separating the property.

On the other hand, the hotel and conference part does not give much profit, and it might be attractive for a new owner to lease the land to a farmer in the area. The discussion did not lead to any recommended solution.



The case concerns strategies and concepts for development of several state properties in central Oslo. The National Gallery will move to a new museum building around 2020, and government has now decided that the neighboring Museum of History is to be developed on its present location. The challenge is to find suitable tenant(s) for vacant building space, and develop the area as a whole, ensuring a balance between the requirements and dreams of tenants and the capacity of the buildings and the area to tolerate change without losing. The situation for the properties is much debated in media.

In the discussion, a number of issues were raised. Many of these will be covered by the project before it is completed. Together, the presentation and discussion illustrated the challenge of working with property development involving several ministries, where responsibilities are not clearly defined on government level, and the decision makers are reluctant to act.

4. Proposal for criteria to be discussed, and for work in 2014

The cases from the participating countries are different in many ways, and we understand that they reflect current challenges with high priority. In order to ease discussion and exchange of experience, we propose that the working table does a simple survey of cases based on a mainly quantitative approach. In practical terms, we propose that each country describes a larger number of case properties, giving a set of data based on a slightly adapted version of the criteria proposed from the Netherlands. The main intention with adaption is to highlight two issues:

In B, problem: Short explanation of WHY this is a problem

In C, strategies: Short explanation of possible strategies within the mandate of the organization, and the potential and problems connected to each strategy.

We propose this survey to be based on 10 properties from each country, with short descriptions of each case. Norway may collect, structure and distribute the results of the survey before next meeting, so that the results may be discussed at the next meeting as a basis for the next step. We will also take responsibility to make a summary of the next meeting, update the survey with results of discussions and prepare a report to the meeting of directors.

Latvia suggested that learning could also be based on examples of best practice. A simple way to utilize this is that one or two examples of best practice are presented and discussed at each meeting, independent of the survey.

Also the valorization question may be discussed outside the survey – or cases could be included in the survey, to illustrate some of the possible strategies.

We propose the following time schedule for continued work:

All countries send comments on proposed aims and structure of work, contents of survey and time schedule for the Working table	January 10 th
Norway sends new version of survey to be filled in	January, week 3
Video meeting to discuss questions concerning	February, week 6
All countries have answered the survey	February, week 9
Norway has structured the material and sent the completed survey to all participating countries	April, week 15
Next meeting	May 2014
Preparation of report for the September meeting of directors	Summer
Presentation of report at the meeting	September 2014

Management plans for cultural heritage properties – general structure

Part 1 – main frames for management of the property

1. Introduction
2. General information about the property
3. Protection orders – according to the cultural heritage act, and others if such exist
4. Cultural history value – or why protect this property
5. Management, operations and maintenance
6. How do we do it
 - a. Ordinary maintenance – and measures requiring dispensation from protection orders
 - b. Procedures for dispensation from protection orders
 - c. Routines

Part 2 – Details

Detailed information from registrations is stored in a database, to be used as part of the new digital management support system.