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icc@unimc.it

Editore

eum edizioni università di macerata, Centro
direzionale, via Carducci 63/a - 62100
Macerata
tel (39) 733 258 6081
fax (39) 733 258 6086
<http://eum.unimc.it>
info.ceum@unimc.it

Layout editor

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Saggi

Elements for impact assessment of cultural heritage and community well-being. A qualitative study on Casentino's Eco-museum

Glenda Galeotti*

Abstract

The growing interest in the impact assessment of cultural heritage has generated a diversity of approaches often focusing mainly on the economic dimension. However, if we consider the cultural heritage as a common and relational good, any activity aimed at promoting its educational, social and economic values needs to produce benefits for the community in which the good is located. Therefore, we must necessarily resort to other concepts and tools for measuring the impact of valorisation activities of cultural heritage on community well-being. We must also consider the value for community members. This article illustrates a qualitative research carried out through a case study with the direct involvement of local stakeholders (multi-stakeholder approach). This introductory study is part of a wider research program that the author is currently developing. In accordance with the Quality of Life studies, the main result of the research is the definition of elements

* Glenda Galeotti, Assegnista di ricerca, Università degli Studi di Firenze, Dipartimento di Scienze della formazione e psicologia, Via Laura, 48, 50121 Firenze, e-mail: glenda.galeotti@unifi.it.

useful to the impact assessment produced by the valorisation of cultural heritage, in terms of well-being of local communities.

Il crescente interesse nella valutazione di impatto del patrimonio culturale ha generato una diversità di approcci, spesso incentrati sulla dimensione economica. Se però si considera il patrimonio culturale come bene comune e relazionale, qualsiasi attività volta a promuovere il suo valore educativo, sociale ed economico deve essere in grado di produrre benefici per la comunità in cui il bene si trova. È necessario, dunque, ricorrere a concetti e strumenti in grado di misurare l'impatto delle attività di valorizzazione del patrimonio sul benessere della comunità locale, considerando anche il valore attribuitogli dalla stessa. Questo articolo illustra una ricerca qualitativa realizzata attraverso un caso di studio con il coinvolgimento diretto degli attori locali (approccio *multi-stakeholder*). Si tratta di uno studio introduttivo ad un percorso di ricerca più ampio e articolato che l'autrice sta sviluppando. In accordo con gli studi sulla Qualità della Vita, il principale risultato della ricerca è la definizione di elementi utili alla valutazione dell'impatto prodotto dalla valorizzazione del patrimonio culturale in termini di benessere della comunità locale.

1. *Introduction*

In the wake of international debate on “going beyond the GDP”, *Equitable and Sustainable Well-being in Italy* project (BES)¹ is aimed at developing a set of indicators to measure and evaluate the well-being of Italian society. It also includes “Landscape and Cultural Heritage” amongst the twelve dimensions of well-being. In the BES project, well-being indicators of cultural heritage contain measures referred to as subjective aspects, to evaluate the contribution of cultural heritage on the quality of life of individuals, and objective aspects, to evaluate the state of cultural heritage as a common good². This second aspect is designed with three main items: the endowment of cultural heritage, the expenditure by local authorities for their conservation and management, and the plague of illegal buildings³.

Although it introduces “Landscape and Cultural Heritage” as a well-being factor, the survey focuses on the perception of site values or on their depletion/maintenance and on the forms of protection guaranteed by the public government, to assess how these can be considered common goods, carriers of widespread wealth, in which to identify and work towards ensuring respect for, and their safeguard for future generations. However, this kind of study does not consider how, and to what extent, the use and valorisation of the heritage may affect the well-being of citizens.

¹ ISTAT, CNEL 2015.

² Costanzo, Ferrara 2015.

³ *Ibidem*.

Starting from this framework, this paper⁴ shows the results of a qualitative research, whose overall objective is to understand the contribution of cultural heritage valorisation activities⁵ to community well-being⁶. This introductory study is part of a broader research and defines a first hypothesis of analysis framework, which is certainly susceptible to further adjustments.

If we consider cultural heritage as a common and relational good, any activity aimed at promoting its educational, social and economic value should produce benefits for the community in which the good is located. Therefore, we must necessarily resort to other concepts and instruments for measuring the impact of cultural heritage on the well-being of the local community, starting from the value the community itself places on it. For this, the research adopts a perspective of analysis based on the direct involvement of the community in the research process, which is increasingly spreading in Quality of Life (QoL) studies⁷.

Moreover, given the intangible nature of some relevant concepts (identity, common value, etc.) associated with research vocabulary, qualitative approach seems better suited to explore and understand the object under investigation.

Most of the studies on QoL are usually carried out with quantitative research methods, in the form of numerical evaluation produced by statistical processes. But if the aim of the research is to understand and explore the characteristics of a phenomenon and the relationship between the various processes that define it, then qualitative research methods may be more relevant⁸. Using qualitative methods in QoL studies is important when considering people's perceptions, feelings, interpretations, opinions and ideas, regarding the issues addressed by the research, as well as to probe into the "why" and the quality of the phenomena investigated. Overcoming the dichotomy between subjectivity and objectivity, subjectivity acquires particular importance, since the quality of life is a concept consisting of two dimensions, objective and subjective, as well as the social reality⁹. Qualitative studies focusing on a single feature or a small number of features create a more detailed knowledge of the quality of the

⁴ Thanks to the project *Tuscany: a Global Laboratory for Quality of Life*, promoted by Tuscany Region, Toscana Promozione and E.di C. s.p.a. – Polo Lionello Bonfanti, Prot. 2014/3014/8.4.1/30, Decree n. 135, 28.04.2014 and Decree n. 325, 15.12.2014.

⁵ For the Italian Code of Cultural Heritage and Landscape (Legislative Decree n. 42/2004), the valorisation of heritage is attained by «establishment and organization of stable resources, facilities or networks, i.e. in the provision of technical expertise, financial resources or instrumental, aimed to perform the duties and to achieve the purposes» (art. 111), such as: «a) to promote the knowledge of cultural heritage; b) to provide the best conditions of use and public enjoyment of cultural heritage; c) – to support conservation action of cultural heritage. In these activities can compete, cooperate or even participate private entities, individual or associated» (article 6, own translation).

⁶ Sirgy *et al.* 2013.

⁷ CLIQ 2011; Attwood *et al.* 2014.

⁸ Tonon 2015.

⁹ *Ibidem.*

phenomenon and a greater level of understanding. They allow the development of a useful analysis, in order to overcome barriers of system change or the resistance of individuals. This aspect is connected with the participatory approach, which allows the stakeholders' direct involvement in the research process. Consequently, the qualitative research can be considered an evaluation moment of their actions¹⁰, in which the phenomenological quality of a specific context is retained and the interpretations of participants on the phenomenon investigated are collected.

Finally, the research adopts an analytical perspective based on the community that is increasingly spreading in QoL studies¹¹. Therefore, the research presented fits in with the latest developments of QoL studies: territorial analysis of the quality of life at the micro- or meso-level¹² and analysis with the direct involvement of the community in the research process¹³.

2. *International background of the study*

In the current international debate on development, cultural heritage has gained increasing recognition as an asset in eradicating poverty, inequality and discrimination whilst seeking innovative development pathways with full ownership of communities¹⁴. Cultural heritage¹⁵ is

a group of resources inherited from the past which people identify, independently of ownership, as a reflection and expression of their constantly evolving values, beliefs, knowledge and traditions. It includes all aspects of the environment resulting from the interaction between people and places through time¹⁶.

It can contribute to achieving sustainable and equitable development for all through its role in human development, as well as being a force for bringing

¹⁰ These are called "naturalistic approaches" to the assessment or "assessment of fourth generation".

¹¹ Magee *et al.* 2012.

¹² Sirgy *et al.* 2013.

¹³ CLIQ 2011; Attwood *et al.* 2014.

¹⁴ Four Resolutions by United Nations General Assembly Building issued in 2010, 2011, 2013, 2014 recognize the need to give due consideration to culture in the elaboration of the Post-2015 Development Agenda, because it plays an important role in inclusion and reconciliation or in improving people's rights. Additionally, through the transmission of shared values, knowledge and skills, Resolutions spell out that culture is potential for greater sustainable production and consumption patterns, emphasizing that it is an important factor enriching quality education. International community is looking for development strategies that foster effective, transformative change and that rely on culture, with its full integration, through cultural heritage and the cultural and creative industries, in the framework of the future system of goals, targets and indicators.

¹⁵ UNESCO 1972 and 2003a.

¹⁶ Council of Europe 2005a, article 2.

about stability, resilience and meaning to communities¹⁷ and providing resources to promote mutual understanding and conflict resolution between culturally diverse groups¹⁸. International documents underline the value of cultural heritage as a tool for social cohesion¹⁹. They also recognise the close relationship between creativity, cultural heritage and economic and productive resourcefulness that safeguards and promotes cultural diversity in the “transition point”, i.e. between cultural creation and marketing, and between culture value and market value²⁰. Culture could have the ability to promote development that goes beyond the purely economic dimension, by safeguarding both tangible and intangible heritage, protection of particular cultural expressions, promotion of cultural diversity and recognition of the key role of local players²¹.

Investing in culture and creativity for all necessitates a commitment to achieve inclusive and equitable quality in education and life-long and life-wide learning opportunities²². It is important to understand that culture is open, evolving, and thereby just as much forward looking as a repository of the past through heritage and traditions. Moreover, it is considered a fundamental factor for the healthy development of society, contributing to creation of the future that people and their community want. Therefore, the valorisation of cultural heritage is as important as its protection and accessibility. Ensuring that heritage is presented with modern means allows culture to fully contribute to sustainable social development and the repository institutions of cultural heritage are an integral part of these efforts. New experiences in this direction are emerging: citizens’ initiatives realized by enthusiastic and competent people have re-launched sites, places, knowledge and traditions, reorganising labour relations and the community²³.

Current research and innovative practices suggest that heritage is a rather complex and dynamic concept related to many fields as well as a strategic resource (fig. 1). Consequently, its valorisation is an integrated process that includes activities developed from social, economic and educational values that communities attach to tangible and intangible expressions of their cultural and natural heritage²⁴. New initiatives and products based on conservation, rehabilitation, patrimonialisation, museology and dissemination of cultural heritage can contribute to community interaction, social integration and employability (by creating new jobs, self-employment or social enterprise), producing also social capital²⁵.

¹⁷ UNESCO, UNFPA, UNDP 2015; UNESCO 2001.

¹⁸ International Conference of Ministers of Culture 2015.

¹⁹ UNESCO 2005.

²⁰ UNESCO 2013.

²¹ UNESCO, UNDP 2013; Council of Europe 2014.

²² UNESCO 2014.

²³ Ministers of Culture of European Union 2014; European Commission 2014.

²⁴ UNESCO 2010; European Commission 2014.

²⁵ European Commission 2013; Summatavet, Raudsaa 2015.



Fig. 1. Cultural Heritage “as a tool of/for...” by analysis of international strategic documents here mentioned (Source: own elaboration)

3. *Research method*

The starting point of this research considers cultural heritage as a common good²⁶ and a special category of relational good²⁷. This means that any activity aimed at promoting its educational, social and economic value should produce benefits for the community in which the good is located. Therefore, the research object is the relationship between the activities based upon cultural heritage and community well-being that they produce, investigated with a case study on a particular form of valorisation as an eco-museum. Hence, the specific objective is to identify the indicators that impact upon the assessment of cultural heritage valorisation in terms of community well-being. In the pursuit of this goal, the research makes use of the concept of social cohesion and social capital as they have been defined and used in previous studies on QoL²⁸.

²⁶ Ostrom 1990; Hess, Ostrom 2007; Mattei 2011.

²⁷ Bruni, Zamagni 2004; Bruni 2006; Donati, Solci 2011.

²⁸ These were born in the United States in the 1960s to collect and process data on non-economic components of well-being and have the main function of directing policy-makers' choices. In Europe, however, these studies are developed mainly in the academic field. In recent years, QoL studies have leaned towards the knowledge of structural change, emergencies and social trends, to be made available to policy-makers, researchers, planners, economic entities and citizens. In the course of their development, these studies have mainly focused on:

- expansion of the databases for the construction of social indicators to improve basic

QoL is a complex concept that does not have a universal definition or a standard for its measurement. In fact, QoL studies are often dedicated to the operational declination at the macro- rather than micro-level, with a quantitative rather than a qualitative approach²⁹. The most recent developments in this field of study are directed towards territorial analysis of the quality of life at the micro- and meso-level³⁰; analysis with direct involvement of the community in the research process³¹, and the use of qualitative research methodology³².

Among the key concepts used in this area of research there are social cohesion and social capital, adopted in the present study. Although the long and articulated debate on the two concepts will not be illustrated here, we will make special reference to their operational declination that is useful to build the framework for analysis of the case study undertaken in this research.

The concept of social cohesion has long been debated in the academic and political spheres³³. In sociologic literature³⁴, there are different and diverging positions on the concept of social cohesion and on the tools for its detection, due to the difficulties in distinguishing between its constituting elements and its affecting factors³⁵. Despite agreement on the multi-dimensional nature of the construction, the main theoretical positions take a static view, which defines social cohesion as a “condition of society”³⁶ or a dynamic vision as a process of attaining a specific goal³⁷.

information about society;

- comparative analysis at an international level, and also nationally, through evaluation projects that use shared scientific criteria, thus increasing the value and validity of individual and joint efforts;
- definition of new theoretical and analytical models such as the work of the “Sarkozy Commission” on the Measurement of Economic Performance and Social Progress (Stiglitz *et al.* 2009).

In the 1980s of the last century, in Italy a large number of reports analysed regional socio-economic conditions. For example: the studies on social indicators realized for Tuscany Region and the experience of the “social budgets of area” (*bilanci sociali d’area*) conducted in Lombardy.

²⁹ OECD 2013.

³⁰ Sirgy *et al.* 2013.

³¹ CLIQ 2011; Attwood *et al.* 2014.

³² Tonon 2015.

³³ Council of Europe 2005b and 2008; OECD 2011. For the political point of view, OECD offers one of the latest contributions, defining social cohesion as «a cohesive society works towards the well-being of all its members, fights exclusion and marginalisation, creates a sense of belonging, promotes trust, and offers its members the opportunity of upward mobility» (OECD 2011).

³⁴ For example, Durkheim (1893) links social cohesion to the idea of solidarity; Parsons (1937) talks about cooperation between social units because the actors internalise a common system of the rules and values institutionally promoted by a society. On the different definitions of social cohesion in the literature see: Schiefer, van der Noll 2016.

³⁵ Vergolini 2009.

³⁶ Rajulton *et al.* 2007; Bollen, Hoyle 1990; Ultee 1998; Jenson 1998; Lockwood 1999; Chiesi 2004; Chan *et al.* 2006.

³⁷ Berger-Schmitt 2000; Canadian Heritage 1995.

In a cohesive society where productive factors are efficiently used, governance creates opportunities for inclusion and participation, which is pursued in all sectors and areas; the distribution of resources is equitable and services are universally accessible³⁸.

Regarding its measurement, social cohesion can be detected with reference to ecological or individual indicators. In the first case, it is a property of the social system and, consequently, its detection takes place at the macro-level³⁹. Recent measurement methods consider social cohesion on the micro- and community level⁴⁰. In the second case, the overall level of social cohesion, although it is considered as a predicate of society as a whole, is attributed to individual attitudes in different spheres of social life, and behaviour and social relations that take place at an individual level⁴¹.

From the debate on the concept explained briefly, this work adopts social cohesion in its static view, as a *state of affairs* of society, and an ecological approach applied at the micro-level. Here, the operationalisation of this concept is similar to that proposed by Jenson⁴², and its further elaborations, which maintain a multidimensional view, but make use of ecological data, fitting into the Canadian tradition. Therefore, social cohesion is divided into three main domains (social, political and economic), within which are shown the dimensions identified by Jenson with the addition of the dimension of equity in the economic domain proposed by Bernard⁴³ (fig. 2).

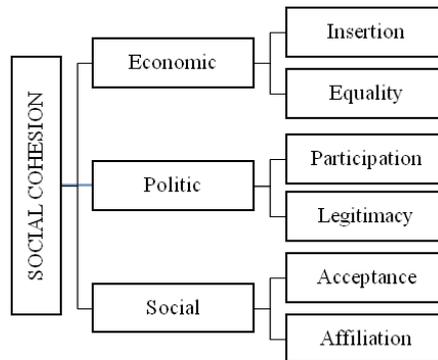


Fig. 2. Operationalisation of the concept of social cohesion (Source: Rajulton *et al.* 2007, p. 465)

³⁸ Di Franco 2014.

³⁹ Berger-Schmitt 2000; Rajulton *et al.* 2007.

⁴⁰ Rajulton *et al.* 2007.

⁴¹ For example, Canadian Heritage 1995; Chiesi 2004; Chan *et al.* 2006. See also: Dickes *et al.* 2008 and 2009; Acket *et al.* 2011.

⁴² Jenson 1998.

⁴³ Bernard 1999.

Moving on to social capital, which is a core concept in sociology, political science, organisational behaviour and business, etc. a classic definition of social capital is: networks together with shared norms, values and understandings that facilitate cooperation within or among groups⁴⁴. For some, this is a component of social cohesion⁴⁵; for others, social cohesion and social capital are the same thing⁴⁶. Di Franco distinguishes two concepts on the basis of function and of the relationships that they provide: in social capital, relationships will deliver resources, while in social cohesion they exist regardless of the fact that individuals are able to take advantage of them⁴⁷.

In this research, social capital, i.e. the occurrence of trust, and mutual and cooperative attitudes that create relationships around cultural assets⁴⁸, is distinct from social cohesion and is not considered a dimension or measure of it. Social cohesion seems to be a broader concept than social capital less linked to voluntary actions led by individuals or the result of an investment behaviour⁴⁹.

When cultural heritage is defined a “relational good” namely «immaterial entities, it consists of social relations that emerge from agents reflexively oriented to produce and enjoy together a benefit that they could not otherwise attain»⁵⁰. The research focuses on the complex system of relationships around a tangible or intangible cultural asset that is (physically or even conceptually) linked to:

- a context that originated it as a form;
- a set of other goods of different scales which places it in an organised system and community that socialise its value⁵¹.

Therefore, the valorisation of cultural heritage is directed to feed, rebuild and reactivate its value, contributing to create and increase the social capital of a territory, thanks to the development and reaffirmation of these references. The social group is defined by the manifestation of these values for which it should be recognised.

According to the relational paradigm⁵², social capital can be considered a special quality and configuration of relational networks that feed and make synergistic individual facilities and the life chances of the people involved⁵³. It is not an attribute of individuals or of social structures but is a quality of

⁴⁴ This definition of social capital is by Putnam and used by the World Bank, the OECD and other international organizations. Cfr. Putnam 2000 and 2001.

⁴⁵ For OECD (2011) and World Bank (2013) social capital and social cohesion are the same thing.

⁴⁶ Chan *et al.* 2006.

⁴⁷ Di Franco 2014.

⁴⁸ Coleman 1990; Putnam 2000; Bartolini *et al.* 2008.

⁴⁹ Klein 2011.

⁵⁰ Donati, Solci 2011, p. 8.

⁵¹ Lupo 2009.

⁵² Donati 1991 and 2011.

⁵³ For example, Bartolini *et al.* 2008 claim that social capital can be relational or non-relational: the first one is non-market relations component of social capital or its behavioural aspect; the second one refers to beliefs concerning component social capital.

social relations that enhance relational goods. It is also possible to distinguish different forms of social capital, from the relational contexts that produce it:

- primary social capital: a characteristic of primary relationships (family, friendship) operating mainly with informal criteria;
- secondary social capital: a characteristic of secondary relationships (civic or civil culture), operating mainly with formal criteria.

This study considers the secondary social capital, in terms of organised civil society, associations or civic networks. It consists of trust between individuals who have a common membership with an association or community, in enlarged social reciprocity, i.e. the symbolic exchange between those who belong to the same association or civil, political, territorial community. Secondary social capital is a factor of civic culture and indicates the best practices through which citizens exercise their rights and responsibilities in public life. It is not a tangible or intangible entity that can be used as a tool, because it consists of relational elements like trust and reciprocity. Such opportunities and individual benefits that may be obtained should be considered as expressions of a common good.

Given the different approaches to social capital, its relational character is as a social ownership entity, not individual, due to its being connected to a cultural asset. In defining the framework of the research, the conceptual articulation shown in figure 3 was adopted. This also takes into account the distortions that social capital can produce, such as the strengthening of exclusive identities, homogeneous and closed groups, social divides, and egocentric bonding. For instance, organisations, clubs and social groups with high social capital have the power, the means and even the motives to exercise non-inclusive practices and policies⁵⁴.

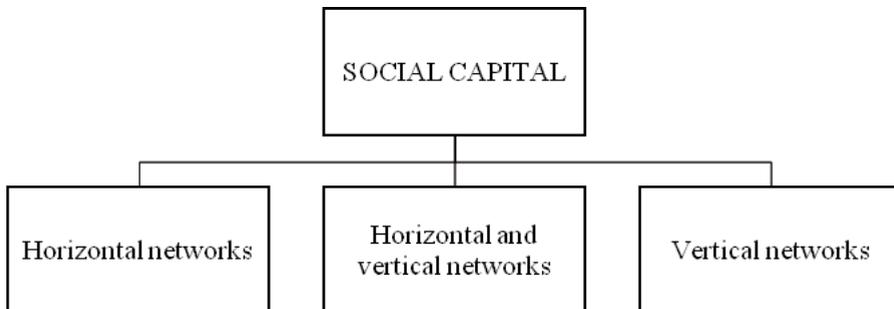


Fig. 3. Adopted concept of social capital (Source: own elaboration)

These types of associations are defined:

- horizontal networks of civic engagement include aspects of social organisation (formal relationships, norms and trust), coordination and cooperation for mutual benefit;

⁵⁴ Kamberidou, Patsadaras 2007.

- horizontal and vertical networks are aspects of the social structure that facilitate actions of participants within it, as well as intermediary associations and organisations;
- vertical networks formalise relationships through macro-structures, macro-level of the institutions of society.

To observe and to analyse the relationship between heritage and well-being, the research resorts to a case study «a research strategy comprising an all-encompassing method»⁵⁵, rather than a real and proper methodology, able to deal with particular situations within their own functioning, characteristic complexity⁵⁶. This is an empirical research on a phenomenon in the real context in which it occurs and, as such, uses multiple sources of evidence, with an exploratory purpose and preliminary to future studies, also in a comparative perspective⁵⁷.

Accordingly, the qualitative research program was divided into the following phases:

- desk analysis to build an analytical framework starting with the QoL studies used in the data collection through case study;
- field analysis to understand the relationship between cultural heritage and community well-being with the direct involvement of heritage professionals and local key players in eco-museum activities.

The desk analysis has carried out: a critical review of relevant literature on QoL; analytical and methodological frameworks used to measure and evaluate the valorisation activities of cultural heritage; quantitative measures and qualitative assessment of performance, in terms of input, output, impact and outcomes; existing initiatives and practices that link cultural heritage activities with community well-being. Its output consists in the analysis framework for the case study, applied to Casentino's Eco-museum in the second phase of research.

The field research program includes the following activities:

- selection of the case study and identification of the main features of the “eco-museum” device for cultural heritage valorisation;
- mapping of the “holders” connected with the activities of Casentino's Eco-museum;
- data collection through four focus groups and six semi-structured interviews with some previously identified holders;
- systematisation of data collected with the content analysis methodology;
- case study reporting.

Previous to the focus group with local players, in-depth and semi-structured interviews with heritage professionals were undertaken, in order to identify the

⁵⁵ Yin 2009, p. 14. See also: Yin 2011.

⁵⁶ Stake 1995.

⁵⁷ Yin 2009.

features of the eco-museum device, the principal local players involved in it, and their roles and tasks. The classification of key players who participate in different ways in the eco-museum activities is helpful to the continuance of their involvement in the subsequent steps of the research, dependent on their roles as well as an understanding of the data collected from their positions in the system.

Other semi-structured interviews were conducted after the focus groups, in order to verify the reliability of the data collected and the indicators used to understand the relationship between cultural enhancement and well-being produced.

Finally, it is important to mention the method of analysis and management of data collected in the phases of research. Focus groups and interview texts were treated using content analysis tools, a process applied for encoding qualitative information, which can be thought of as a bridge between the language of qualitative research and that of quantitative research⁵⁸. This procedure consists of the analytical segmentation of content into categories and conceptual areas through “units of meaning” useful to explain a phenomenon⁵⁹.

In this case, the analysis and systematisation of the units or core of meaning are the result of classification procedures of the respondents’ perception about effects produced by the eco-museum in the domains and categories defined *ex ante*. During the work, we reviewed these same categories thanks to the identification of the relationships among them.

In brief, from the methodological point of view the main features of the present research are:

- the use of qualitative methodology within the framework of QoL studies;
- a community-based prospective for analysis of the relationship between valorisation activities of cultural heritage and community well-being;
- a participatory approach that involves different local players in the verification of reliability of analytical framework developed (multi-holders approach).

Therefore, consistently with the latest developments of QoL studies, the research adopts an analytical perspective based on the community in two ways: as a reference area of the study, that investigates the effects of heritage valorisation in terms of well-being; as direct involvement of key players in the research process according to a participatory approach.

In fact, the mapping of “holders” connected with the activities of Casentino’s Eco-museum is a critical step in the research process. It has helped to identify the key players, to classify them according to what legitimises their participation in the network and to bring back their point of view with respect to the position taken in the investigated system.

⁵⁸ Boyatzis 1998.

⁵⁹ Gläser, Laudel 2013.

4. Features of the case selected: Casentino's Eco-museum

The selection of the eco-museum as a case study is due to the fact that, among devices for cultural heritage valorisation, this, more than any other, originates and develops through the direct involvement of the local community⁶⁰.

Originally, the eco-museum's philosophy paid particular attention to the relationship between places, communities and their heritage, in order to explore the idea of how intangible and tangible heritage resources contribute to the "spirit of place"⁶¹. Nevertheless, today, the eco-museum in Italy has an increasingly important role as a local development driver⁶².

The Declaration of Intent, which was approved during the meeting *Long Networks: Eco-museums and Europe*⁶³ reports the European definition of the eco-museum, as «a dynamic process by which communities preserve, interpret and enhance their heritage for a sustainable development. An eco-museum is based on a pact with the community»⁶⁴.

The main characteristics of this territorial device for valorisation of cultural (both tangible and intangible) and natural resources are:

- overcoming the formal aspect of an eco-museum toward designing real actions that will enable change in society and improvement in landscape;
- general involvement and shared responsibilities of the community;
- interchangeable roles: public officers, representatives, volunteers and other local key players all playing a vital role in an eco-museum⁶⁵.

Following a complex approach, in recent definitions, eco-museums are more properly defined by what they do rather than by what they are. Interest in eco-museums and, more generally, ethnographic museums of enhancement of local or material cultural heritage is continually growing⁶⁶.

In Italy, the eco-museum has had widespread application with the fruition of 173 projects supported by the ten regions⁶⁷. Besides common elements related to eco-museum definition, the Italian framework has heterogeneous experiences

⁶⁰ Reina 2014.

⁶¹ Corsane *et al.* 2007a, 2007b and 2009.

⁶² Italian Ecomuseums Network 2015.

⁶³ European Ecomuseums Network 2004.

⁶⁴ This definition proposed by the European Ecomuseums Network is substantially different from that of ICOM in 2007.

⁶⁵ European Ecomuseums Network 2004.

⁶⁶ Davis 2011; Magliacani 2014.

⁶⁷ The Piedmont Region has been the pioneer of eco-museum experiences in Italy (Regional Law n. 31/1995). It has promoted the establishment of eco-museums, with the aim to protect, to promote the uniqueness of the area and to encourage sustainable forms development. Also, the Tuscan Region has a law regarding eco-museum, which defines it: «a cultural institution, public or private, non-profit, aimed at cultural and educational territorial development, through the population's participation, research, conservation and development of cultural assets, both tangible and intangible, that represent the environment and the way of life over time, accompanying its development» (R.L. 21/2010, article 16, own translation).

in the application of this territorial device for cultural heritage valorisation.

Among these, Casentino's Eco-museum's purpose is aimed at the protection, conservation, interpretation, valorisation and transmission of the landscape; its cultural history, traditional production and ethnographical heritage of the first Arno valley, in both its tangible and intangible expression, and in a sustainable manner⁶⁸. Established in 2004⁶⁹, today the eco-museum is managed by Union of Casentino's Municipalities⁷⁰, which promotes and coordinates its activities. Other municipalities in the area comprise cultural organisations, social promotion associations and private individuals that participate in the eco-museum management. It gathers culturally, geographically and scenically homogeneous areas, and is structured in 15 "antennas" (fig. 4), covering six different systems (water, forest, agricultural and pastoral civilisation, castle, archaeological and manufacturing).



Fig. 4. Casentino's Eco-museum and its "systems" (Source: <<http://www.ecomuseo.casentino.toscana.it/>>, 01.07.2016)

The choice of Casentino's Eco-museum as the subject of this case study is due to some of its structural and organisational elements that make it a unique example within the Italian framework and, at the same time, representative of other eco-museum experiences.

⁶⁸ Regulation of Casentino's Eco-museum, <<http://www.ecomuseo.casentino.toscana.it/>>, 01.05.2016.

⁶⁹ Council of Casentino Mountain Community, Resolution No. 53/2004.

⁷⁰ Council of Union of Casentino Municipalities, Resolution No. 51/2013.

These elements are:

- capillary diffusion of the territory through the eco-museum antennas;
- its public-private character;
- inclusion of traditional productive sectors;
- volunteering as a basic element.

In addition, it was recently recognised as one of the eight national best practices by ICOM Italia (International Council of Museums)⁷¹.

The peculiarity of the eco-museum is that it is a system of cultural heritage valorisation that integrates dimensions, aspects, activities and places. More specifically, Casentino's Eco-museum System has a reticular shape that grows from the tangible cultural heritage throughout the territory (network nodes), connecting them and their traditional activities (intangible dimension of heritage). Therefore, we can talk about integration between the objects of eco-museums and the material dimensions of heritage. The valorisation actions are inter-sectorial in nature, i.e. related to different areas of the local life system. Another element of integration concerns governance, which is the prerogative of different types of local players (public, private, third sector, etc.), in order to manage and coordinate their activities to achieve shared goals.

In short, the integration of the eco-museum model has three main dimensions:

- subject: tangible and intangible local heritage, natural and cultural assets;
- action: related to different sectors and disciplines, as economic, historical, archaeological, cultural, educational, environmental, etc.;
- management (governance system): local authorities, private enterprises, civil society organisations and voluntary associations.

Cooperative relationships with other organisations have developed around the core of founding key players, who manage and implement eco-museum activities. Each of these adds to the network, its assets (financial, human, knowledge, relationships, etc.) and can be identified in the seven kinds of holders, classified according to what legitimises their participation in the network⁷². As we will see later, these same key players come together in associations of various types that constitute the social capital produced by the activities of heritage. The following table shows the different participants in the eco-museum (tab. 1). Some of these were interviewed or took part in focus groups planned by the case study.

⁷¹ For the international meeting “Museums and Cultural Landscapes” of Milan in 2016, ICOM Italy has promoted a national campaign for the selection of good practices. Among the 195 experiences evaluated, eight are selected, including one of Casentino's Ecomuseum, <<http://network.icom.museum/icom-milan-2016/>>, 01.05.2016.

⁷² Bellini *et al.* 2006.

Type of Holders	Key Players of Casentino's Eco-museum
<i>Share-holders</i> have a direct role in the governance of the partnership and normally have a responsibility in its management.	Management bodies of eco-museum: Advisory Board, Coordinator, Eco-museum Service Centre, Scientific Committee; Association, private individuals, enterprises, interest groups that manage the cultural and natural sites of the eco-museum.
<i>Status-holders</i> have formal jurisdiction over its economic development or technology policy (e.g. governmental bodies) or have been granted the formal right to represent an economic category (e.g. chambers of commerce, industrial associations), even though they may not be directly involved in the management of the partnership.	Union of Casentino's Municipalities; Province of Arezzo; Other Municipalities party to the Agreement.
<i>Stake-holders</i> are the key players affected by the outcome of the partnership's actions. They must be local.	Internal stakeholders: Association, privates, enterprises, interest groups that manage the cultural and natural sites of the eco-museum; External stakeholders: farms, food and wine enterprises, accommodations and restaurants, other cultural and natural sites of area, different types and levels of Educational institutions of the area, the Casentino Bio-district, local producers and artisans, Casentino's Forest Park, Casentino's Centre for Educational Research and Education (CRED) and Media library.
<i>Interest-holders</i> are the "spokespersons" for any constituency that may have an interest in the partnership's management (e.g. other partnerships).	Sector Associations (businesses and organisations that are part of the eco-museum); Associations of local producers (of Cetica's potato producers Consortium, chestnut flour consortium); ProLoco (provincial, regional and national associations); Casentino Development and Tourism Consortium and its associates.
<i>Knowledge-holders</i> are the "experts", who possess some knowledge or skills that are useful or necessary for the realisation of the partnership's activities.	Masters of art, crafts and other traditional workers; Tourist and environmental guides; Community Animators; Volunteers; Researchers / students / teachers / experts.
<i>Relational-holders</i> are the gate-keepers of relations with external networks (e.g. financial institutions), which could provide important resources (finance, knowledge etc.).	Province of Arezzo; Local Action Group (LAG) Apennines Arezzo Consortium; Tuscany Region; European Union; Italian and European Eco-museum Networks.
<i>Rights-holders</i> are the "citizens", i.e. the members of the local community (such as taxpayers), who are entitled to voice their opinions on public policies.	Citizens, local communities, members of civil society organisations and voluntary associations, tourists/customers.

Tab. 1. Holders involved in the Casentino's Eco-museum and their role (Source: own elaboration)

5. Does Casentino's Eco-museum improve social cohesion and social capital?

One of the main research results was understanding how the Casentino's Eco-museum is able to produce social cohesion. Following the proposed operationalisation of social cohesion, the research data collected shows the outcomes of the eco-museum activities in economic, social and political domains, suggesting the most significant aspects for each of them. With Dickes *et al.*⁷³, the economic domain of social cohesion is articulated in two aspects:

- insertion/exclusion, as labour market capacity;
- equality/inequality, in opportunities and conditions.

Casentino's Eco-museum indirectly affects an increasing number of entrepreneurs who participate in it, strengthening businesses (antennas), thanks to their greater visibility, recognition of traditional activities value and the authenticity of their products. In this sense, it is of particular interest the development of two Consortia of producers (Cetica's potato and Raggiolo's chestnut flour) born within the eco-museum's activities.

Economic efficiency of the eco-museum is characterised by giving value to relationships rather than profits, because it uses local human resources for its activities, placing itself as an instrumental driver of territorial development⁷⁴. The direct effect on job creation is mainly attributable to the collective enterprises (employment cooperative) that propose museum education and other cultural activities intended for both school classes and a wider public, or manage restaurants and typical shops. The typology of these enterprises is also significant in terms of equal opportunity, as beyond its features of prevalent mutuality, solidarity and democracy, they are female and youths' enterprises. There are also more sporadic work opportunities for tourist, cultural and environmental guides. The participants to this research believe that the economic dimension has received less attention than other areas and effects are to be considered the result of non-systematic actions. Only in the last period, this aspect has become more important for eco-museum managers and stakeholders. This new focus on the eco-museum represents a tool for alternative economic development linked to the "demand of change" coming from community⁷⁵.

In the economic domain, the focus is on ability to directly and indirectly create employment opportunities by improving the business of the involved enterprises. These same data were then read from the point of view of equality, focusing

⁷³ Dickes *et al.* 2009.

⁷⁴ Murtas and Davis explore how eco-museum principles were applied in practices using local heritage to provide community development. Their analysis has considered three levels of sustainability: to develop common values and meaning for a strong sense of involvement, to give new life to old buildings, to valorise their core local knowledge giving it a contemporary feel to throw new light on traditional events or local markets. See: Murtas, Davis 2009.

⁷⁵ Italian Ecomuseums Network 2015.

on the characteristics of workers involved (foreigners, women, youths, people with special needs), and about the kinds of jobs created (for example social cooperatives, employment cooperatives or other form of collective enterprise).

In general, it can be affirmed that eco-museum creates the necessary conditions and facilitates the processes of creation of economic opportunities and employment, also through listening to the needs and requests of the local community.

Moving on to the social domain, the eco-museum expressed as a territorial device is able to develop shared values and a sense of belonging to the community. All research participants share a strong sense of identity linked to the territory and to the culture it expresses, recognising its distinctive characteristics. This can be considered an element of affiliation, meaning the ability of cultural heritage to give meaning to actions, history and active participation of citizens in eco-museum projects as volunteers.

To be part of a common culture and to contain the risk of losing it are the main reasons for volunteering time and labour, but also what motivates cooperation. The interviewees believe that their participation is extremely useful for the preservation and protection of local cultural and natural resources and they have a high sense of self-efficacy. They also believe that the educational action promoted by the eco-museum is the main tool for keeping this heritage alive, for spreading shared values, and for the sense of belonging to the community, through the awareness of the local richness.

Other aspects considered in this domain are recognition, respect and tolerance for diversity, here defined in terms of presence/absence of conflict amongst players directly and indirectly involved in the eco-museum system.

From this point of view, the research identifies two main elements:

- scarce presence of conflict in horizontal relations among those who constitute the eco-museum, especially thanks to the competence and mediation of the eco-museum's coordinator⁷⁶;
- presence of conflict between external players connected to eco-museum, primarily due to the scarcity of available resources, but also more structural and lasting conflict with entities that deal with the strategic management of the territory as a whole.

It is believed that those who should give strategic direction and accompany efforts for territorial development do not possess adequate capacity to do so. As we shall see, this aspect connects with legitimacy, as an aspect of political domain regarded by the study.

The research also highlighted another element linked to the social domain, not provided in the definition phase of the analysis framework. It regards accessibility to the cultural goods, as the opportunity to enjoy them by citizens, in general, and even by those who have special needs.

⁷⁶ Murtas, Davis 2009.

During the years, non-formal and formal educational activities undertaken by the eco-museum have promoted access to cultural heritage in terms of knowledge dissemination related with it (intangible assets). A further element of impact assessment could be the measurement of learning outcomes produced by these educational activities, directly on members of the community and eco-museum visitors⁷⁷.

In recent times, efforts to include people with special needs are becoming more significant, with the presence among stakeholders of multifunctional farms, which offer, in limited form, social and educational services dedicated to them⁷⁸.

In brief, the social domain considers:

- affiliation, i.e. the ability to create a sense of belonging to the community through cultural heritage and heritage education;
- acceptance in terms of the presence of conflict among the eco-museum's holders;
- access, providing the opportunity for all to enjoy the heritage.

Another aspect connected to the sense of belonging and to the essence of every eco-museum experience is the active participation in the preservation and management of cultural heritage. De Varine, founder of the French eco-museum movement says that the eco-museum belongs to the community and if the community does not care, it disappears or becomes an ordinary museum⁷⁹.

A significant number of volunteers are involved in the eco-museum's actions, as well as proposed cultural events, which reach a substantial audience. Voluntary associations for cultural promotion, such as ProLoco, manage many of the eco-museum's antennas⁸⁰.

In the Regulations of the Casentino's Eco-museum, municipalities are obliged to form an agreement with local associations for the management and promotion of the single structures. The active role of residents in mountain environments like Casentino, living in small Municipalities, ensures the effectiveness and continuity of the different experiences. Groups of people, who take care of a museum, or a collection, immediately improve their intrinsic value and communicate directly the objectives of their experience. In fact, the protagonists of the issues addressed often explain the values, the memories, and the messages of the museum.

The volunteers, therefore, exert a double function:

- protection and management of cultural heritage;
- improved access and enjoyment of the cultural object, as depositories of knowledge connected with it.

⁷⁷ Kling 2010; Hansen 2014.

⁷⁸ Italian National Law no. 141/2015 decrees that «agricultural enterprises can be structured according to a logic of multi-functionality to enable them to offer social services, generating cohesion» (article 1).

⁷⁹ De Varine 2005.

⁸⁰ Volunteers associations who actively operate in the eco-museum activities are thirteen.

It should also be noted that this type of voluntary participation is not episodic, but long-term and often the interest in the cultural sector or museum has already been active for years. Another factor is the presence of both elderly and young volunteers, and therefore a significant intergenerational component of the same. Through the years, the eco-museum service centre has organised specific activities to renew the volunteers’ motivation and to attract the interest of other people.

The second aspect of the political domain that needs to be considered regards the legitimacy, or the capacity of political and social institutions to maintain themselves, and see themselves legitimised as mediators between different interests. On this point, the research has highlighted discordant opinions. Whilst the eco-museum enjoys legitimacy by the community’s citizens, some of the organisations that form part of the whole, are considered to be unable to mediate between the different interests. In light of the data collected, it can be said that where trust in the public institutions’ capacity to protect interests is low, the eco-museum has a positive effect on that climate of mistrust.

To summarise what has emerged from the qualitative research program, figure 5 shows social cohesion domains investigated with their criteria and the areas in which to develop indicators of impact evaluation.

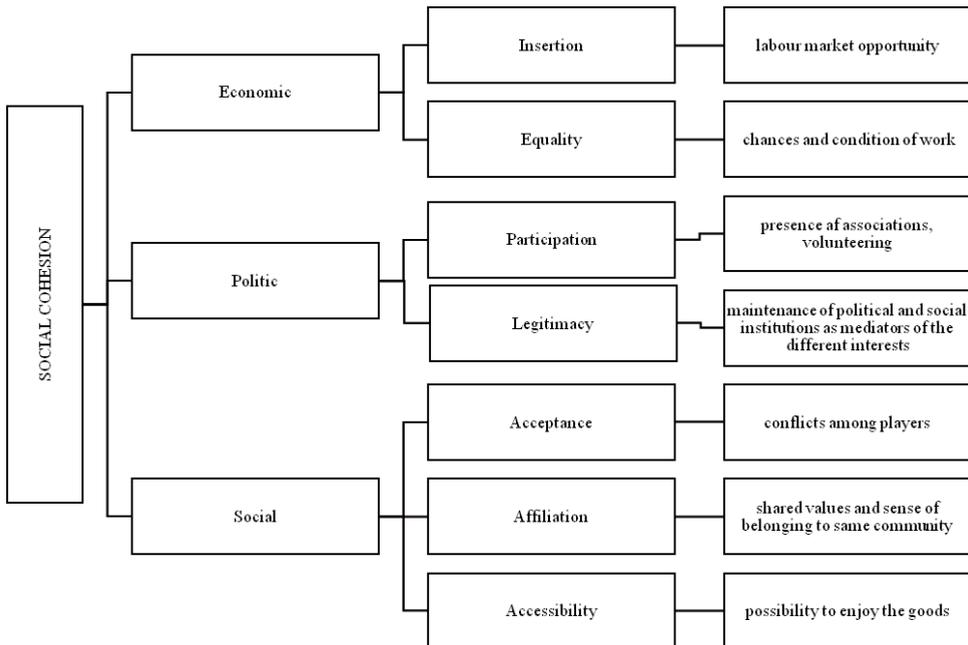


Fig. 5. Domains, criteria and areas of social cohesion identified by the research (Source: own elaboration)

On the other hand, the ability of the eco-museum to create social capital is shown through the analysis of the networks that are built around its cultural

heritage. Considered as a relational good, it has an intangible surplus that increases when it is recognised, socialised and incorporated as knowledge in the collective consciousness of a community and therefore practised. The eco-museum can be seen as a tool to develop this added value. The analysis takes into account secondary social capital operating mainly with formal criteria, but it does not disregard informal primary relationships (friendships and family relationships especially related to volunteering) developed around this.

Starting from the reticular structure involving public and private organisations, social enterprises and voluntary organisations in eco-museum management, research has highlighted which relationships are developed through valorisation activities of cultural heritage. For this, the preliminary analysis of the type of holders proved to be essential.

Two distinct categories of horizontal networks have been pointed out:

- relations between the eco-museum as a whole and other local organisations;
- relations between each of the eco-museum antennas and other local organisations.

The research finds that these horizontal networks develop a high level of interaction based on mutual trust and cooperation to achieve common benefits. Their character can be stable or tied to specific activities and projects.

If, from the point of view of spatial structuring, we can talk about a distributed system, its management structure and the horizontal associative network are partially decentralised⁸¹.

Despite this, relations are characterised by mutual interdependence, where the output of one player becomes the input for another, and vice versa. Mutual interdependence implies a kind of relationship in which there is a circular sequence between activities, objects, subjects, etc. In this case, we are dealing with cross-sequence and two-way relations, because the organisations that manage the system are the same that operate within distinct areas.

Reciprocity, intended as the degree to which a relationship is commonly perceived and agreed by all parties, is based on the convergence of interests and actions towards certain goals or values. The eco-museum as a network of mutual exchange can be classified as a production network, instrumentally oriented to govern exchange and services; a symbolic network, based on the identification and sense of belonging of the participants through the sharing of values and projects⁸². At the level of the museum antennas, there are also primary relationships, based on interpersonal and emotional elements (exchange with family and friends), that can provide human (volunteers) and instrumental resources⁸³.

⁸¹ Baran 1964.

⁸² Johannison 1987.

⁸³ Starting from the content of relationships, the networks developed by the eco-museum traced back mainly to affiliate network (or joint action), typical of associative networks. They are also transactional in character (network for the exchange of products and services), for information

Moving on to the second type of horizontal and vertical networks, intermediary organisations facilitate the actions of key players within the structure: they are mainly public entities that contribute to eco-museum activities in different ways (the Union of Casentino's Municipalities, the National Park of Casentino Forests, the Province of Arezzo, the Region of Tuscany), but also sectorial or category associations. The research reveals that local players have less confidence in the organisations that are part of this associative level, because they believe that their action of mediation is almost non-existent, ineffective, or that it even hinders the achievement of the desired objectives. According to them, this is due to two distinct variables: geographical distance, greater distance is perceived as less trustworthy, and the inability to play the role of mediator (ineffectiveness of action taken).

A final level concerns vertical networks or relationships formalised through macro structures or macro level institutions. One mentioned by respondents, and therefore the most significant for them, is the Network of Italian Eco-museums.

The following table explains what has emerged from the network features detected by the research:

Type of social capital networks	Trust	Reciprocity	Economic character	Non-economic character
Horizontal networks	Yes	Yes	Yes	Yes
Horizontal and vertical networks	No	No	Yes	No
Vertical networks	-	-	No	Yes

Tab. 2. Type of social capital developed by Casentino's Eco-museum (Source: own elaboration)

From what has been shown, it can be said that the eco-museum, as a territorial device of cultural heritage valorisation, is able to build and strengthen social capital based on the idea of local cultural identity and shared values, in order to generate cooperation between players based on reciprocity and trust. When these elements decrease, it significantly reduces the ability to cooperate with other levels of the system, to join in vertical associations and to use intermediate facilities of mediation to achieve their own ends. This may indicate some sort of closure of the system and a lowest relational exchange between players outside of this.

6. Discussion

The importance of a museum institution for its community is the object of a wide range of works that mainly explore the socio-cultural and economic effects.

exchange (network communication), but also of rules and affections, typical of social expectations network (Mitchell 1969).

Some studies assess the value of the museum in terms of tourist development of the territory; others estimate the effect of the same impact in terms of increased income and jobs; others assess the total value of the institution based on the willingness to pay declared by potential and/or effective users of a museum⁸⁴.

In this study, it is believed that these elements only are not able to explain the potential of the cultural heritage as a common and relational good. Hence the need to investigate the causal link between cultural heritage and production of social benefits for the local community.

To observe the above-mentioned relationship, the research made use of a case study on the eco-museum, as a specific device for cultural heritage valorisation. The interpretive framework was built through to operationalization of the concepts of social cohesion and social capital, as possible “indicators” of community well-being, in line with the QoL studies. The results confirm the existence of such bond and highlight specific facets of the concepts of social cohesion and social capital in the context under lens.

The research shows the outcomes of the eco-museum activities in economic, social and political domains, suggesting the most significant aspects for each of them. It clearly emerges that the preservation and valorisation of cultural heritage, when governed by the direct participation of citizens, plays an important role in the preservation of assets and in promoting insertion, equity and affiliation of community members. Even where the institutional support is perceived as small or ineffective, the ability of citizens to identify with heritage and to cooperate in its safeguard is the driving force that directly and indirectly generates economic and social effects. However, this element may determine the strong presence of horizontal networks based on trust and reciprocity among local actors, at the expense of vertical networks or relationships formalised through macro structures or macro level institutions.

In the case of Casentino’s Eco-museum, the cultural heritage component is intrinsically linked to local community life. This common value can be a powerful force for economic growth; an essential element in creating distinctive and enjoyable places; fostering understanding of themselves and those around them and can contribute in building cohesive, empowered and active communities, fostering improved health and well-being, increasing social cohesion, and improving economic sustainability.

Traditionally, studies on eco-museum evaluation have focused on performance and success through self-evaluation methods (for example: the MACDAB method, that was developed by the International Centre for Cultural and Heritage Studies of the University of Newcastle and Institute of Economic Social Research of Piedmont⁸⁵). Today there is an increasing need to assess

⁸⁴ Dallari *et al.* 2012.

⁸⁵ Borrelli *et al.* 2008; Graham *et al.* 2009.

the social impact of these initiatives on the local communities⁸⁶, and yet few researchers consider this aspect⁸⁷.

In reference to QoL studies, this research can be considered a cutting edge work, as it uses concepts, domains and indicators developed in studies of QoL but to date not within the cultural heritage dimension. It does not deal with individuals but with the community as a whole, and therefore falls into the studies on the quality of society, where social cohesion is seen as one of the major components⁸⁸.

Finally, it should be mentioned that in the Europe 2020 strategy, economic, social and territorial cohesion has been identified by the European Commission as a tool to overcome the crisis and continue along the path of development⁸⁹. In this sense, the study shows how valorisation of cultural heritage can contribute to achieve these results⁹⁰. This work is also consistent with the provisions of the new Work Plan for Culture 2015-2018, where among the European main priorities there are accessible and inclusive culture, cultural heritage and the promotion of cultural diversity.

The eco-museum's culture can be a real prospect for the development of the area in terms of economy, social cohesion and structural strength, through the definition of new scenarios that focus on natural beauty, human relationships, respect for the earth, or rather, the quality of life in all its nuances⁹¹.

7. Conclusions

The growing interest in the impact assessment of cultural heritage has generated a diversity of approaches and methodologies that present both richness and weakness and comparisons are difficult to make. Another risk is limiting these assessments to the economic dimension only, or a fragmented analysis in different areas⁹².

⁸⁶ Italian Ecomuseums Network 2015.

⁸⁷ A recent research studies the eco-museum as an accelerator of regional development, taking into account economic, environmental and social dimensions (Negaz, Para 2014). Some of the impact indicators utilized are referred to aspects proposed in this paper. See also: Montanari 2015. On social impact assessment of cultural activities see: Cicerchia 2015.

⁸⁸ Berger-Schmitt 2000.

⁸⁹ European Commission 2010.

⁹⁰ Building upon the 2007 European Agenda for Culture as well as on the results of the previous ones (Work Plans for Culture 2008-2010 and 2011-2014) the 2014-Work-Plan addresses the key challenges faced by cultural organisations and enterprises in the creative sector at national and European level.

⁹¹ Italian Ecomuseums Network 2015.

⁹² Bollo 2013.

Whilst considering this type of evaluation important, the attempt carried out with this work is to overcome the risk to reduce the results of heritage activities to economic performance only. An integration of indicators set with qualitative metrics that are indeed more difficult to measure, makes it possible to evaluate the cultural, social and political effects generated at the community or territory level in an integrated way. With reference to QoL studies, it was possible to highlight how a specific heritage valorisation device, such as the eco-museum, is able to create social cohesion and social capital in the community of reference. What emerges is an analysis on a territorial basis that does not exclude the economic domain, but which underlines its aspects of inclusion and equality and associates it with social and political domains.

The research presented was limited to the qualitative analysis of the aspects identified, in order to adapt domains proposed by social cohesion and social capital definitions and relative indicators to the specific research object and context. However, in order to validate these, they must be applied to other eco-museums in a comparative perspective. Therefore, this research can be considered a first step for the development of a territorial-based model of analysis of the contribution of cultural heritage to local community well-being.

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