Załącznik nr 1 do zapytania ofertowego

z dn. 28.06.2018 r.

local EX-ANTE ASSESMENT:

Methodological guideliness

focus groups

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| D.T3.1.2 | Institute for Economic Research |

**Timeframe:** Middle of December, 2017(before the tender for pilot managers, as the document should be included in the tender)

**Language:** English and local language

**INTRODUCTION**

Built heritage represents a huge potential opportunity which can add architectural and/or historical character, distinctiveness and local colour to a wider new development. The key is to find the optimum viable use for the heritage asset[[1]](#footnote-1), which can be accommodated without impacting its conservation value, and which is viable in the context of the wider scheme. Today, in a number of countries the private sector, civil society institutions and government have started to work in partnership to help conserve the cultural heritage and develop it as a socio-economic asset. Critical to the success of re-use of historical buildings is finding a viable economic use while conserving the heritage value of the building to find equilibrium between development and conservation. The re-use of historical buildings requires an interdisciplinary approach with the involvement of multiple players, not only to initiate and carry out conservation but also to sustain (re-use) the place. It is also widely recognized that re-use needs to be embedded within social, environmental and economic development strategies that include financial mechanisms to encourage and facilitate public-private and third-sector contributions.

Figure 1 represents the process of developing the new economic use based on economic regeneration consisting of physical, functional and social revitalization.

Figure 1: The process of economic growth, decline and growth



Source: Heritage Works: The use of historic buildings in regeneration: A toolkit of good practice, 2013[[2]](#footnote-2).

As part of the Forget Heritage project (according to Application form), the management methodology described in the manuals previously produced will be tested in pilot actions by local partner authorities. The aim is to test novel tools and methods developed in the project and to evaluate their efficiency. Different aspects of the Manual will be tested in a historical building with cultural relevance, and each pilot will be implemented in a different kind of building with its different history behind and located in a different context. They are recognized as heritage asset and are considered worthy of preservation for the future. To check, if the pilot historical buildings are embedded within the social, environmental and economic environment, the ex-ante assessment for each pilot site will be carried out.

This methodology is intended as a tool, providing practical guidance to the Project partners in the preparation and the realization of the Local ex-ante assessment of the pilot site envisaged in the Application form.

**AIM OF THE EX-ANTE ASSESSMENT**

The Ex-ante assessment (D.T3.1.2) represents the analysis of the initial state of the pilot project site from different angles:

* The first purpose of the document is to provide the **assessment of the current state of the asset** (pilot site).
* The second purpose is to offer some **insights into what would be most reasonable future use** of the pilot site based on the analysis of the state. With regard to that, the results of analysis should provide an assessment of the **content of the pilots** as were already defined in the Application form. In case that the analysis does not point to that, you should take the opportunity to rethink the pilot project and propose some additional activities in the conclusion which could strengthen your project.
* The results of the Ex-ante assessment should be **included in the Tender for pilot managers** (D.T3.1.1), **to provide additional relevant information for the applicants** (potential Pilot managers).
* The document should also **provide input for the asset evaluation which will be carried out at the end of the project** based on the Pilot reports and the comparison of the final state with the initial asset evaluation.

Figure 2: The Ex-ante assessment process



Source: Authors

**STRUCTURE OF THE DOCUMENT**

1. **Introduction:**

For the introduction, you can adapt some of the text from these guidelines to describe the aim, method of data collection (or sources of data), etc. Here you should also shortly describe the proposed pilot activities as you defined them for the Application form.

1. **Analysis of the state:**

This part is focused on the description of different angles (location, site, management …) of the current state of the pilot site/asset. You should follow the given outline below and shortly describe different aspects.

1. **SWOT Analysis**

Here you need to fill in the SWOT matrix according to the methodology explained below.

1. **Future use**

With regard to the analysis, here you should think about the appropriate future use of the pilot site. You should think about the needs, aims, funding and challenges as well as propose some orientations for the future programme. The future use proposals should be in line with the description of the pilot that you provided for the AF or present a reasonable addition to that proposition.

1. **Conclusion and justification**

Here you should compare the findings of the analysis with the pilot project as you proposed it in the Application form, and justify your decision.

1. **References**

**DATA COLLECTION PROCESS**

In order to prepare the ex-ante assessment, as much information as possible should be acquired from the focus groups and analysis which were already carried out within the project (The local citizens needs analysis, Research on legislation and policies at the local level, …). Information from any other existing previous analyses can be used as well. After filling in the document with existing information, missing information should be added based on an interview with the public administrator in charge or existing pilot site manager (where relevant). Part of the text in the Introduction and Aim section of this document could be used/modified to provide an introduction to your Local Ex-ante analysis. In the Introduction there should also be a description of your pilot in line with the description that you provided for the Application form.

The text in the tables which is *in grey* is obviously only there for your help, so you should delete it when you fill in the tables.

1. The term ‘heritage asset’ includes listed buildings; old buildings that are not listed but still have local historical importance; scheduled monuments; war memorials; historic wreck sites; parks; historic gardens; conservation areas, archaeological sites and so on. They also include places and properties that are not formally protected through the designation system, and certain historic landscapes.[[7]](https://en.wikipedia.org/wiki/Heritage_asset#cite_note-7) The term 'heritage asset' is often used as a convenient collective term for all these items. [↑](#footnote-ref-1)
2. https://historicengland.org.uk/images-books/publications/heritage-works/. [↑](#footnote-ref-2)