



ORGANISATION DES VILLES DU PATRIMOINE MONDIAL
ORGANIZATION OF WORLD HERITAGE CITIES
ORGANIZACIÓN DE LAS CIUDADES DEL PATRIMONIO MUNDIAL
جامعة مدن التراث العالمي
ORGANIZAÇÃO DAS CIDADES DO PATRIMÓNIO MUNDIAL

L'atelier *En route vers Oaxaca* – Document officiel

The members in good standing of the OWHC that wish to submit a project to the *On the Way to Oaxaca* workshop, which will be held in Cordoba on June 4-5 and 6, 2013, must complete this Call for Projects and send their file to the General Secretariat of the OWHC (secretariat@ovpm.org) on **Monday, December 10, 2012 at the latest.**

City: **Évora**

Mayor (political authority): **José Ernesto d'Oliveira**

Date and duration of the mandate: **elected in 2009 (4 years term), until October 2013**

Person in charge: **Nuno Domingos**

Name: **Nuno Domingos**

Position: **Director of the Department of Historic Centre, Culture and Heritage of the Municipality of Évora**

Co-author of the project: **Jon Kohl**

Title of the project: **Évora's Public Use Plan**

Mailing address, telephone number and email:

Municipality of Évora

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Project completed

Project in progress

Date of completion: December of 2013

Expected date of completion:

What percentage of the project is completed? Specify.

We've completed three of the eleven modules.

Information on the city

1. Significant historic, demographic and geographic characteristics
2. Present function of the city (administrative capital, economic metropolis, etc.)
3. Major economic activities

The city of Évora is the main urban centre of the region, in population and functional terms. The social and economic dynamics of the city has managed to counter the tendency of the region as a whole, maintaining a growth similar to other medium-sized cities in Portugal. In the past few decades the growing urbanization of population presents itself as a global trend, with the increase of population transfer of small clusters to urban centers, either to big or to medium-sized cities. As Portugal has an urbanization rate much lower than the rest of Europe it seems that the dynamics of growth of urban centers continue to provide values substantially higher than the surrounding regions. This reality is also associated with a positive net migration. The demographic projections for 2016 are based on the migratory movement in support of population growth. The valorization of the environmental

component and the promotion of sustainable development have gained special importance in the region in recent years. The appreciation of natural areas or of defined environmental valences, along with economic sustainability and a qualified social-cultural local network, have been constituted as assumptions made by society in general and by the organs of sovereignty in particular. In the short term the region will have new infrastructure that will promote the logistics of the county and the city, reinforcing the role of Lead as a city of Évora Alentejo region. The High Speed train Lisbon-Madrid is in the design phase and is scheduled a stop north of the city of Évora. With regard to freight rail, it is also planned a link between the Sines platform to Spain, also passing through Évora.

Because of its location, Évora has spaced itself as a hinge between the coast of Alentejo and Extremadura. In fact, the platform ensures the port of Sines as a shipping cargo between northern and southern Europe as well as a road access (IC33, IP2 and A6) across Europe through the port city of Elvas. It is assumed that this dynamic is enhanced in the future via the TGV rail corridor, which will also have a stop in Évora.

Given its size, centrality and visibility in the national context, Évora emerges as the pole in a better position to lead the hierarchy of regional urban system. Indeed, the city clearly has a cultural and academic vocation. In conjunction with the national urban system, medium-sized cities in the Alentejo region with particular relevance to Évora, should contribute jointly to promote the harmonious development of complementary regional network.

4. Information on the Property inscribed on the World Heritage List

Name of property:

R: The Historic Center of the City of Évora

Year of inscription

R: 1986

Inscription criteria

R: Criterion II (best example of city of the Portuguese golden age, after the earthquake of 1755) and Criterion IV (only the urban landscape of Évora permits nowadays to understand the influence of the Portuguese architecture in Brazil, in places like Salvador da Bahia (inscription in 1985 in the list of world heritage)

Land area and location of the property

104ha

Province. **Alentejo**

District: **Évora**

N38 34 23.016 W7 54 28.008

5. Is there a sustainable development policy at the city level? If yes, what are its broad lines? (maximum 250 words)

The Sustainable energy plan of Évora comes from the acceptance of the municipality of the compromise launched by the European Commission to the commitment to achieve the objective of the European Union concerning the reduction of the emission of gases with greenhouse effect.

This plan was made in circumstances of big financial difficulties and growth of costs of energy which reinforces the importance and need of the adoption of measures to turn more efficient the energetic consumption.

In this scenario, this plan is more comprehensive because it includes actions aimed at reducing emissions of greenhouse gases, but also actions that, not affecting

these emissions, optimize the financial aspects of the acquisition and use of energy, allowing the release of resources for other areas. Included are sections of buildings, public lighting, transport and waste, distinguishing the actions destined for the population of the county from those exclusively dedicated to municipal heritage. Despite the reflection made on the reduction of greenhouse gas emissions and energy consumptions, the object of this plan was not the study of environmental and economic value associated with its implementation.

Project summary (maximum 100 words):

The Public Use Planning approached, sponsored by UNESCO and the PUP Global Heritage Consortium, co-creates a long-term mentoring relationship with a heritage site to help local stakeholders plan for and implement their own public use or tourism management strategy. It differs from conventional consultant-written management plan approaches by supporting the stakeholder community in developing its capacity to plan for and implement without paternalism or outsiders doing what the local heritage city could do for itself. Thus the approach focuses on organizational learning that avoids many of the conventional implementation barriers promoted by the standard technocratic, top-down approach.

1. To which of the following sub-themes is the project related?

R: Economy and tourism, Other

Considered to be the most appropriate sub-theme, since the recipients that the application of this methodology aims to achieve are the visitors, meaning the one who visits, which naturally includes the inhabitants and outsiders.

2. Location of the project in relation to the Property inscribed and to the city (where applicable)

R: The Historical center of Évora and surrounding territory.

3. The challenges of the project [maximum 250 words per question]

a. Which urban problem(s) does the proposed project address?

Neither the Municipality of Évora nor the city in general has a plan to manage its public use attractions and resources. Even more, over a dozen different institutions ranging from government, NGOs, private sector, and the Church manage its attractions, making an integrated coordination exceptionally difficult to achieve. Given these dispersed responsibilities, the Municipality came to realize that only a participatory, consensus-based approach could offer any hope to unite the different interests into one coherent approach, but to present Evora has lacked this social process. Adding to this challenge, Evora and Portugal in general is currently operating in an extremely difficult financial time where, for example, a new law prohibits the creation of any new budget line items. Thus, resources from all sectors have become ever more critical to public use management than any moment in the past. Since tourism is a business, this means that to collaborate with the private sector and indeed earn dividends in this sector, many of the non-profit attraction managers must adopt a business mentality in order to maintain their properties. It became clear then given this new environment and the increasing role of stakeholder communities in general in the management of urban heritage, that the Municipality of Evora had to find a new approach that avoided the conventional top-down, government-funded approach that in recent history has produced over time diminishing results. To our good fortune, UNESCO offered a program that represented a new path forward.

- b. What are the objectives of the projects (quantitative and/or qualitative)?

The objectives are the following:

By way of a long-term mentoring relationship with the Public Use Planning Program, the Municipality of Évora aims to develop its capacity to facilitate collective decision-making about public use management throughout the city and surroundings. Thus on one hand, the Evora tourism community should develop a public use planning process with improved coordination and trust among its members which will be continually and participatively updated over time (rather than just end up on a shelf and never be updated) while on the other hand improving the public use infrastructure and services that increase the visitor experience and conserve heritage attractions of our city. In other words, we seek objectives on four different levels: 1) produce a technically superior participatory public use plan (plan, tool development), 2) develop planning and implementation skills for the staff of the Municipality (staff development), 3) develop organizational learning and adaptive culture within the Municipality (organizational development), and 4) cultivate a stakeholder community that can collective make decisions and mobilize resources to conserve heritage and improve the visitor experience in the Historic City of Evora (community development).

c. Operational strategy to address the problem(s)

The PUP Global Heritage Consortium's Public Use Planning Approach builds a cooperative relationship with the site based on trust rather than a short-term relationship based on money and paternalism. To do this, the site develops a first draft public use plan in the first 8–12 months by way of 11 basic modules, modified according to the situation. Immediately thereafter, PUP accompanies the site in implementing the site. During this three-year process, PUP introduces new public use planning innovations such as participatory interpretive frameworks and Limits of Acceptable Change monitoring (Objective 1). Because it works with stakeholders, especially those of the Municipality, it helps staffs develop facilitation and democratic skills necessary for consensus-based participatory planning (Objective 2). Over time, other elements within the Municipality become involved and change some policies and bring down organizational culture barriers to participatory planning. Similarly a later module involves adaptive or organizational learning skills which should be applied more widely than just public use. In the case of Evora, municipal representatives from a variety of areas already participate in the process (Objective 3). Over three years of community-wide participatory planning, the stakeholder community develops greater cohesion, trust, and cooperative systems for managing public use in Evora (Objective 4). Thus, the process both develops a technically respectable public use planning process as well as a social decision-making process. The entire approach is based upon the premise that Evora makes the decisions, operates at its own pace, and without the fear that the project will end when a particular financing has ended.

d. In what way is the project relevant in relation to the problem?

Heritage sites, cities in particular, both enjoy and suffer from increasingly diverse stakeholder communities with increasing numbers of value demands at the same time that government heritage budgets have fallen precipitously across Europe and beyond. Thus the days of unilateral decision making by a single management entity have just about come to an end. If heritage cities are to survive this transition, they must both embrace the tourism industry and its ways of operating and also share power with its stakeholder community mediated by a participatory consensus-based decision-making process. If cities do not go in this direction, they will likely suffer a gradual or perhaps not so gradual decline in both the quality of their tourism services as well as the conservation of heritage resources. We are extremely fortunate then that UNESCO appeared with the PUP Program and with the PUP Global Heritage Consortium that has continued with the program after the finalization of the UNESCO project to help Evora through this transition. We realize

we can no longer depend on central government funding to keep us going, now we must develop our own locally sourced resources and community power to get the management job done. We hope our example may be of use now to other heritage cities and even more so in two years when we are fully into the community-based implementation of our public use plan.

4. Implementation of the project: (Who, when, how, financing)

a. Who is driving the project?

The Municipality of Évora in collaboration with representatives from the PUP Global Heritage Consortium

b. Who is implementing the project?

Câmara Municipal de Évora

Direção Regional de Cultura do Alentejo

Universidade de Évora

Fundação Eugénio de Almeida

Arquidiocese de Évora

Turismo do Alentejo

Associação Comercial

Associação de Diretores de Hotéis

AGIA – Associação de Guias Interpretes

AHRESP – Associação de Hotéis Restaurantes e Similares de Portugal

APECATE – Associação Portuguesa de Empresas de Animação Turística

Coleção B – Associação Cultural

CENDREV – Centro Dramático de Évora

Pé de Xumbo – Associação Cultural

Eborae Música – Conservatório de Música

Associação Do Imaginário – Associação Cultural

PUP Global Heritage Consortium

UNESCO was a critical partner in launching the project but since the project ended in December, the above organizations have continued on.

c. What is the role of the citizens in the project? (maximum 250 words)

In the past, a central management agency tended to “own” heritage resources and make most of the management decisions. Although Evora has always been a multi-stakeholder environment, the Municipality of Evora no longer has the budgetary power to make unilateral decisions. Thus the Municipality must redefine its role more as a facilitator and coordinator than a single power. This means that power must necessarily be strategically redistributed among stakeholders, not only allowing citizens from other sectors to participate but practically demand it. Without the formation of some kind of consensus, stagnation and gridlock often result whether a single family or an entire national government. Evora is no exception.

So the Public Use Planning process calls for a series of public and transparent workshops to make all the major decisions necessary to formulate a public use plan. Each module has a different theme and thus a slightly different composition of invitees, thus ensuring even a wider participation than inviting the same citizens over and over again to the different workshops as often happens in more conventional planning practices that do not realize that people have different interests which can be met with a sub-set of the themes, allowing a greater number of participants to meet their needs.

d. Present the financial framework of the project.

The project began with funds from Turismo de Portugal (national tourism promotion agency) via UNESCO in 2011–12. With the conclusion of this project, the technical

assistance component passes from UNESCO to the PUP Global Heritage Consortium which is committed to work with the Municipality of Evora to find bridge funding without interrupting the mentoring process. At the same time the local planning logistics depends on contributions from stakeholders, especially the support of the Municipality. This lack of funding, although difficult, presents new opportunities to strengthen relationships between the Consortium and Evora and between stakeholders within Evora.

5. What is the link between the sustainable development project and heritage management in your city? (maximum 300 words)

Heritage management of course requires contributions from a variety of fields such as conservation, research, education, restoration, and especially tourism and public use. We say “especially” because it is the visitation that often drives justification to conserve heritage, it is the visitation that often provides the funds to conserve heritage, and it is the visitation that helps to define the interpretive meanings ascribed to resources that convert those resources into heritage and that occasionally heritage into world heritage. The Public Use Planning Approach addresses most of these aspects in different degrees. It values heritage resources in the marketplace and induces visitors to participate in the heritage conservation. It helps heritage managers adopt more business-friendly attitudes, skills, and alliances so that heritage can earn a greater share of its conservation resources. It facilitates an interpretive framework in order to form a consensus set of heritage meanings among diverse community members.

Nevertheless a superficial inspection of PUP would reveal only elements of tourism development without realizing that deeper down PUP is about helping sites like Evora improve their management overall, using public use as a convenient and popular starting point to investigate participatory and democratic issues relevant to all walks of management, especially heritage management. In this sense, its longest lasting result, its most sustainable result, is helping people and organizations organize and make decisions on their own without an overwhelming need to find outsiders to do for them.

6. Explain how the project ties in an innovative step of sustainable development within your city. (maximum 300 words)

Given that the conventional means of delivering a short-term development project is for funders or development organizations to either find funding to do their work or have the beneficiaries contract a consultant for example to write a management plan for the site. This approach is riddled with problems, such as being too short-term for learning to occur, too rigid for different experimental trials, too top-down to meet felt needs, and any time someone else gives away or does for another, critical learning opportunities are lost and the project runs the risk of engendering among the “beneficiaries” the belief that they are not good enough, educated enough, or knowledgeable enough to do for themselves, and thus a dependency based on paternalism erupts.

The Public Use Planning Approach has arisen from a desire to counter this approach that produces such many bad development projects. The heart of its innovation emanates from a different kind of relationship, one that is balanced, based on trust, and driven by the beneficiary rather than the consultants. At any moment, the site can stop. At every moment, the outside facilitators must behave in complete accordance with the principles that they espouse, and they work with the site to create a sort of safe space to experiment with new forms of managing that previously they could never do on their own because they did not have the necessary support or technical counseling.

With patience, this approach should yield numerous small victories on the path to increased capacity to mobilize community resources in order to manage resources without the dependency on exterior funding, which has so often been the norm during times of abundance, times that appear to have ended.

7. Explain how the other cities that are members of the OWHC will be able to benefit from the lessons learned from this project. (maximum 300 words)

Previous answers have established that the problems facing Evora are in no way unique to this context. All across Europe heritage funding has been drying up. All across the world increasingly diverse constituencies demand ever more benefits from urban heritage. The need for a much more robust stakeholder participation is on the rise and urban cities, municipalities in particular, can play the key role of facilitator to mobilize its many small, local communities and stakeholder groups through a persistent dialogue and share of the decision-making pie. In effect, they can become more self-sufficient, a quality ever more important in a world of dwindling public resources. In the case of Evora, we can see the formation of a stakeholder advisory body even decision-making body can complement quite effectively the normal municipal duties. This of course requires increased transparency, patience, and investment, more than municipal leaders are likely accustomed. But by not engaging their constituencies, they will also encounter grave situations for which they also are likely not accustomed.

8. Evaluation of the project

a. What are the expected results of the project? / What are the resulted observed of the project? (maximum 250 words)

The expected results are:

- To build the capacity of site management to plan for and implement public use strategies that protect World Heritage and related sites. (example indicator: plan is implemented for at least two years continuously)
- To identify and avoid through its methodological design barriers to plan implementation (example indicator: successful implementation of strategies that avoid known barriers such as automatic initiation of plan implementation without waiting for government approval);
- The introduction of a new paradigm in site planning: The practice of working together (example indicator: where the municipality can convolve and run participatory meetings without the intervention of external facilitators);
- Implementation focuses on the site's long-term learning about how to create and implement a strategic plan, and not focus exclusively on producing a finely polished, final document that ends up on a shelf – unimplemented (example indicator: adoption of organizational learning tools such as After Action Reviews);
- Obtain participation of those interested in the site (example indicator: percentage of stakeholder groups that participated for the first time during the public use planning process versus before it had begun);
- Overall, develop a new way of seeing and managing, one that is based on learning (example indicator: qualitative conversation with stakeholders about the degree to which they agree with this objective's completion).

Most of those objectives do not carry with them predefined indicators as their progress can be measured in different forms from different perspectives. As the process is participatory so is the evaluation, qualitative and diverse.

b. What are the main beneficiaries of the project (maximum 250 words)

The application of the Public Use Plan should generate reflections about the day-to-day lives of the inhabitants of Evora and even those throughout the country. They

should as well enjoy a reduction in the negative impacts of tourism through an increased access to cultural heritage and increased public recognition of the heritage importance of the city. Since the project is so multi-sectoral from the outset, benefits should accrue the tourism industry, the Church, the Municipality, and by example other heritage cities in Portugal.

c. What are the major impacts of the project on the societal, economic and environmental levels? (maximum 300 mots)

The effects should be observed both from the standpoint of different service providers and visitors themselves. In any case, we consider the following important aspects:

- The construction and development of mechanisms of identity and cohesion of the population of Évora and particularly strategic communities;
- The promotion of habits of cultural appreciation in its broadest sense and in particular with regard to cultural heritage;
- The increase in length of stay from the current three days;
- The control of visitor flow using management mechanisms to redirect flows throughout the day, year, etc.
- Promotion of notions of respect for the rules of conservation of cultural heritage;
- Promotion of site among local population;
- Local earnings;
- To diversify visitors experiences;

Overall though, since Public Use Planning has worked largely in natural sites and cultural landscapes, success in Evora opens up a whole new opportunity for heritage cities around the world. It is in Evora that UNESCO and the PUP Global Heritage Consortium have been adapting the tools and the readings to include the realities of urban life as well as realities in other contexts. If in fact, social cohesion can be increased in Evora that would results in improved heritage management, greater self-sufficiency, and greater mobilization of local resources not just in this one city but in others around the world. See www.pupconsortium.net for more information.



