

Article

# Wide-Area Heritage Projects in Lombardy: From a Mono-Sector to a Multi-Sector Approach

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**Abstract:** A public-private partnership (P3) and public-private-people partnership (P4) are amongst the institutional options available when it comes to funding cultural heritage management through the involvement of private players pertaining to the business or third sectors, respectively. In light of the growing relevance of P4 operations as a means to improve heritage management, this paper aims at analyzing the initiatives developed by the Fondazione Cariplo banking foundation, which can be considered exemplary instances of P4. A total of two projects were selected, which go by the name of *Distretti Culturali* and *AttivAree*, respectively, and may serve as highly indicative examples of community involvement and multi-sector-oriented action. To conduct a truly realistic analysis and reliably measure the adequacy of the outcomes obtained, interviews with the parties involved were performed and direct participation in the projects was provided for. Considering, also, that funding has, so far, typically been aimed at interventions on individual buildings, the foundation has managed to develop some true cross-sector programs, and thus further refine the multi-sector approach most likely to prove useful in future community-centered initiatives. Herein, some of the features are isolated; those which we deem most suitable for adoption in the planning of future cultural heritage-related projects.



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## 1. Introduction: Heritage Partnerships

To an ever-growing extent, partnerships have been recognized worldwide as a viable means of coping with the lack of funding typically affecting the cultural heritage field, both in the literature and its legal aspects. Because a need for innovative funding tools has emerged, partnerships may prove one of the institutional options best suited at ensuring a re-use of historical buildings for the sake of serving local communities and increasing social awareness and participation [1–5]. In addition, their employment may also be highly conducive of further long-term conservation and valorization activities that can be accomplished during the management stage, i.e., after completion of the restoration works. However, this specific form of contract has not yet been widely adopted for the purpose of built cultural heritage management.

On the one hand, the public-private partnership (P3) amounts to a long-term collaboration between public and private entities aimed at fulfilling public duties, by which resources and risks are shared proportionally and based on each partner's own field of expertise. It minimally comprises components of design and build (e.g., construction, renovation, and rehabilitation), but may also include components of financing, operations, maintenance, or management [6]. The private actors involved are driven by for-profit objectives, in that some return on investment must result. They may pertain to the business sector and be either natural persons, legal persons with for-profit objectives (e.g., private universities), economic operators (e.g., construction companies), or financial institutions (e.g., investment banks, pension funds, and insurance companies) [7].

On the other hand, there may also be operations in which a return on investment is missing by definition. The transaction at issue can be termed a public-private-people partnership (P4) [8–11]. As envisioned within the Faro Convention [12], it relates to instances of both philanthropy and community support at the definition and implementation stages. The private entities likely involved are of a civic-minded nature and may be either natural persons, legal persons with non-profit objectives (e.g., ecclesiastical entities), non-profit organizations, associations, and various types of foundations (e.g., banking foundations).

Considering the difficulties which the Italian government typically faces in conserving and managing its rich public cultural heritage, which often lingers in a condition of neglect, our general objective herein is to identify a set of additional tools capable of providing adequate financial resources as well as skills. Besides, available funding is mostly aimed at conservation and valorization initiatives on individual buildings only, and does not entail long term activity-related allocations or a virtuous interaction between cultural heritage and the other production chains, which in the end amounts to the adoption of a mono-sector approach.

This study therefore focuses on the analysis of possible models for public built cultural heritage management that have not yet been clearly defined or widely adopted within the Italian cultural heritage field, especially so in reference to the adoption of:

- One of the available institutional options, to wit, that of public-private agreements;
- A multi-sector approach, which entails the convergence of resources from different sectors into cultural heritage by means of negotiation dialogues, the latter being an up-to-date approach capable of projecting the definition of cultural heritage beyond its traditional boundaries, and thus pose novel opportunities.

In light of the growing relevance of P4 operations and multi-sector approaches as a means to improve heritage management, this paper focuses on the initiatives developed by the Fondazione Cariplo banking foundation, which may well be considered exemplary instances of P4. Indeed, private partners typically wish to view themselves as charitable donors. Fondazione Cariplo is instead promoting truly proactive and systemic cultural heritage management strategies and playing a critical role together with the other project developers, as well as fostering the involvement of a wider spectrum of stakeholders. In the region of Lombardy, the foundation is a pivotal player in the social, environmental, technological, and cultural fields. It traditionally allocates 25–30% of its annual contributions to the cultural sector, 15–20% of which being intended for the conservation of built heritage sites [13]. The resources related to this philanthropic activity provided for by Fondazione Cariplo in 2021 amounted to EUR 140 million, 24 million of which were for the art and culture sector [14].

Moreover, the Italian Recovery and Resilience Plan reserves more than EUR one billion to the enhancement of hamlets and villages and EUR 600 million to the conservation and valorization of rural architecture, thus recognizing and honoring their cultural and landscape values and potential for economic growth [15]. Some of the experiences developed by Fondazione Cariplo deserve to be analyzed by virtue of their long-term activity of conservation and valorization of local values and vernacular heritage, which have all proven to act as stimuli to local economic growth. Considering that funding has, so far, mostly been aimed at interventions on individual buildings alone, the foundation has been capable of developing truly intersectoral programs, thus further refining a multi-sector approach likely to prove useful in future initiatives at a local level.

After the description of the Cariplo Foundation as a P4-partner, the paper proceeds to describe the methodology adopted. Hereinafter, two selected case studies developed by the foundation, namely the *Distretti Culturali* and the *AttivAree* projects, are illustrated from their pre-design stage, which includes information related to the selection of funding beneficiaries and the economic framework, all the way to the design, execution, and management stages. The last part reports the results of their analysis and, also, some final considerations concerning the lessons learnt from to them.

## 2. Banking Foundations as P4-Partners: The Example of the Cariplo Foundation

The Cariplo Foundation is a banking foundation established in Milan in 1991, which, together with the *Cassa di Risparmio delle Province Lombarde*, has its roots in the so-called Central Charity Commission founded in 1816. It is committed to the funding, support, and promotion of socially valuable projects in the fields of art, culture, and environment protection, as well as social and scientific research. Thanks to its recent merging with another bank, the Cariplo Foundation is today one of the top ten foundations worldwide and the shareholder of one of Europe's largest banking groups. It promotes the social and cultural growth of Lombardy, i.e., Italy's wealthiest and most highly populated region, accounting as it does for one-fifth of the national GDP. However, the government's situation of current financial hardship strongly curbed the resources available to citizens and made support by non-profit organizations indispensable.

The foundation's mission is to transcend charity as we have come to know it, and rather to play a proactive and systemic role in the interplay between given public bodies on the one hand and the market on the other. Being a private and independent entity, it aims to be an "innovative philanthropic actor" fully uncoupled from the ups and downs of political cycles and consensus, as well as profit-related constraints.

It generally funds projects through non-repayable grants or mission-centered investments, i.e., those pursuing not only financial objectives but social ones as well. In addition to the private equity and national infrastructure sectors, the foundation has made some significant investments in social housing, where it aims at profiting from its assets to a long-term degree of 3% only to invest in further projects and account for inflation, operating expenses, and taxes. The aggregated benefits the foundation provides should not be measured by means of a mere monetary estimate, but rather in terms of its overall social impact.

In recent years, the Cariplo Foundation has been increasingly involved in the planning of Lombard cultural policy and initiatives. In response to the continuous decline in public spending for culture, it has allocated more and more resources to this very sector, gradually refining its strategies, and has gained an increasing degree of credibility. It has tried to involve stakeholders, catalyze resources, and strengthen alliances between public and private bodies. Over the last 25 years, the foundation provided as many as EUR 948.4 million for 11,212 art and culture-related projects, generally by means of non-repayable grants (excerpt from the 2016 missions balance sheet). It donated EUR 47.42 million for 609 projects in 2016, and EUR 41.4 million for 548 projects in 2017.

We ought to consider that in Italy, GDP-specific public spending for cultural services and activities is typically lower than in comparable countries [16]. On the one hand, ministerial appropriations to cultural heritage restoration and valorization amounted to EUR 77,975,866.57 in 2017. On the other, and in the same year, as many as 88 banking foundations nationwide allocated a total of EUR 64.5 million to the "conservation and valorization of architectural and archeological assets" [17].

The areas of intervention of Fondazione Cariplo, currently the most important nationwide, include:

- Culture and citizens: fostering citizen awareness of and participation in their local cultural life;
- Culture and entrepreneurship: promoting novel forms of collaboration between cultural institutions and local enterprises, and sharing creative processes and activities, as in the case of social responsibility;
- Culture and development: promoting coordination and integration amongst local entities and cultural organizations. This area includes activities of conservation, restoration, and securing pieces of critical cultural heritage by means of methodologically innovative interventions. On the one hand, the overall aim has been to generate employment and new forms of professionalism throughout a given territory; on the other, it has been to involve an entire community and lead it towards repossessing its cultural heritage and becoming its very custodian [18].

This latter approach was at the roots of the *Distretti Culturali* (Cultural Districts) project, which can be deemed as an example of culture-focused community welfare. It is aimed at valorizing cultural heritage in terms of local development pursuant to a long-term vision, and by means of investments in human capital, integration between the realms of manufacturing and culture, innovation in services and methodologies, and sustainability.

Giuseppe Guzzetti, former President of the Cariplo Foundation, is quoted as stating that “the project was initiated in order to promote a new and hopefully effective solution to the problem of protection and, what is more, valorization of the artistic and cultural heritage of the Lombard region. We are aware that only by gathering local resources and skills will we succeed in achieving the critical levels of popularity allowing for culture to become a booster of development”.

### 3. Methodology

The general research methodology adopted is of a qualitative, rather than a quantitative nature. A total of two projects were selected as useful case studies within the Italian context that would serve as perfect examples of community involvement and multi-sector-oriented action. The selected projects were described, starting from their pre-design stage, including the selection of the funding beneficiaries and economic framework, all the way to their implementation and management stages.

To conduct a truly realistic analysis and reliably measure the adequacy of the outcomes obtained, interviews with the parties involved were performed and direct participation in the projects was provided for. Interviews are primary sources, and they were held as a research tool aimed at providing full insight into the case-study context. They allowed to identify on the one hand the factors determining the latent and certainly not measurable successes and failures of the initiatives. On the other hand, it outlines the problems the interviewees have encountered and the needs they have had to cater to. As indicated in the literature, open-ended, non-leading questions were asked [19].

The resulting considerations are mainly the consequence of an examination based on the following parameters: conservation and valorization, resource pooling, and risk sharing.

The research identifies some features suitable for adoption in the development of future projects in the cultural heritage field.

### 4. *Distretti Culturali* Project (The Text concerning the *Distretti Culturali* Project Is Mainly the Elaboration of the Interview Held on 26 February 2018 with Lorenza Gazzero and Elisabetta Rivolta, Employees at the Fondazione Cariplo’s Art and Culture Department.)

#### 4.1. The Pre-Design Stage: Selection of Funding Beneficiaries

The Cariplo Foundation launched the *Distretti Culturali* project in order to improve its interventions on cultural heritage, as it recognized that the previous experiences had occurred regardless of the wider territorial context and conceived without a medium-long term vision as to the management aspects.

The objectives of the project were:

- To plan a strategy of cultural heritage valorization based on the quality of interventions, innovative actions, and a long-term perspective;
- To integrate the cultural supply chain with the local economy;
- To implement an innovative system for the management and development of activities, to be adequately elaborated in accordance with all main local stakeholders.

The foundation started working on the project in 2005 in collaboration with the Lombardy region, which signed a memorandum of understanding. The process, aimed at identifying the financing plan’s beneficiaries, occurred over a period of five years and was developed in various stages, as reported following.

Firstly, a cognitive survey. During the first phase of the project, from 2005 to 2006, the Cariplo Foundation conducted a general pre-feasibility study in order to identify homogenous areas to be identified as Cultural Districts. The study was also aimed at

meeting local politicians and other major stakeholders potentially capable of promoting the project's design and execution stages.

The assessment parameters were based on the characteristics of each area's architectural, artistic, and landscape heritage, not only in reference to outstanding artifacts, but also to "minor expressions of heritage" as recognized by the community; the areas' outlines, which proved not to overlap with the administrative boundaries, but to rather correspond to actual community boundaries (mountainous-area communities and consortiums, etc.); identification and awareness on the part of the local communities; presence of educational institutions; openness to new expressions of culture and ability to network with other cultural contexts; variety of cultural offerings; presence of economic activities linked to the valorization process; and presence of a local administrative system well-inclined towards fostering cultural activities.

This phase led to the identification of 31 potential Cultural Districts as well as the awareness that an accurate planning of actions for the launch of the project was needed. This is why the foundation decided to support the development of additional feasibility studies aimed at strengthening partnerships and experience-sharing.

The second stage foresaw the support to territorial planning. Therefore, in 2007, the foundation launched a tender for the definition of the above-mentioned feasibility studies, which foresaw a 70% cost coverage ratio. They performed an assessment as to the presence of the technical, institutional, and financial conditions warranted for the realization of the Cultural Districts themselves. During this stage, the foundation established a technical-scientific committee consisting of both internal and external members and in charge of selecting the best-suited proposals. Its areas of expertise were to be proficiency in restoration and planned conservation, analysis of management models for cultural heritage, and economic planning. Eleven proposals located in nine different provinces were selected. They were presented by public entities (of which three were municipalities, three provinces, and four mountainous-area communities) and a single group of public and private bodies.

Subsequently, the third stage oversaw the implementation of selected feasibility studies. Indeed, during the 2008–2010 timespan, the eleven selected areas worked on the feasibility studies with the technical support of the Cariplo Foundation, which provided the help of an advisory board, which included practitioners. Moreover, the foundation provided guidelines and the organization of some training days. This stage was the means through which the technical problems, risks, and weaknesses emerging within the working groups would be addressed. Each potential Cultural District spent 18 to 24 months to submit the feasibility studies required [20]. The outcomes of this stage were useful for the implementation phase to follow.

Finally, the foundation evaluated the proposals and chose the six Cultural Districts:

- Distretto Culturale della Valle Camonica: starting March 2009;
- Distretto Culturale Dominus. Oltrepò Mantovano: starting April 2010;
- Distretto Culturale Le Regge dei Gonzaga: starting July 2010;
- Distretto Culturale Evoluto Monza e Brianza: starting July 2010;
- Distretto Culturale della Provincia di Cremona: starting July 2010;
- Distretto Culturale della Valtellina: starting September 2010.

#### 4.2. The Pre-Design Stage: The Economic Framework

Each Cultural District was granted a contribution of up to EUR 3.8 million as part of a co-financing scheme contemplating a participation on the part of a local organization. The Cariplo Foundation asked that all entities involved confirm their commitment and sign a formal agreement, even though such agreement would only have been mandatory in case one party was a public entity. Based on the opportunities and risks emerging during the development of the feasibility studies, the agreement outlined the actions to be accomplished, the parties to be involved and the economic plans. The contract classified each single action into a number of specific types corresponding to different levels and monitoring and accounting protocols, and highlighted the actions intended to pursue priority objectives.

Moreover, the agreement established a “minimum performance plan”, identifying the critical actions which would deserve funding only upon their successful completion.

#### 4.3. The Design and Execution Stages

In itself, the transition between the planning and execution stages might even entail the risk of causing the project to be suspended. The agreement, the minimum performance plan, and the other management instruments (Gantt chart and economic plan) were the means through which strategic priorities and operational progresses were to be supervised.

The implementation of a Cultural District is a lengthy process, which has to weather changes in political terms, and rests upon the collaboration between a political and technical leadership [21]. Unlike the previous initiatives it participated in, the foundation, this time, played an outspokenly active role in the Cultural Districts project.

The main actions of the *Distretti Culturali* experience were addressed to the tangible cultural heritage and 70% of the overall budget was allocated to restoration works. The Cariplo Foundation constantly checked all activities in terms of achieved results and corresponding deadlines. Each Cultural District developed different initiatives:

- Distretto Culturale della Valle Camonica: valorized its local cultural heritage, including prehistoric rock art, evidence of WWI, and contemporary art, etc. The Cultural District’s aim was to promote culture as a leverage for integrated development by strengthening the quality of design and governance, contemporary creativity and new entrepreneurship;
- Distretto Culturale Dominus. Oltrepò Mantovano: was focused on the promotion of rural culture, as well as agricultural landscape and products;
- Distretto Culturale Le Regge dei Gonzaga: promoted world-famous Gonzaga dynasty’s artistic and architectural identity. It fostered the creation of networks among institutions and private firms capable of investing in built heritage conservation and local culinary promotion as ways to support local development;
- Distretto Culturale Evoluto Monza e Brianza: here, the cultural heritage became the resource aimed at fostering general innovation and the creative potential of local private firms, just in line with the outspoken entrepreneurial skills characterizing this territory [22–24];
- Distretto Culturale della Provincia di Cremona: focused on cultural offer diversification and invested in integrating performance, music, and craftsmanship as triggers for economic and social development. More specifically, it integrated diverse artistic and entrepreneurial initiatives pertaining to the field of music;
- Distretto Culturale della Valtellina: tried to consolidate the relationships between landscape, traditional production, and cultural identity by valorizing historical buildings and agricultural-culinary traditions alike [25–27].

#### 4.4. The Management Stage

The development of the *Distretti Culturali* experience was the ideal answer to a lack of cultural heritage management and need of a coordination at a regional level, in contexts where neither habits nor skills were present. The six Cultural Districts were created in response to the continuous decline in funding, a constant increase in tasks to be accomplished, standards, as well as promotion and efficiency targets. Thanks to these districts, a consistent number of historical buildings was restored and valorized by means of interventions ranging from conservation activities to everyday management activities [28].

As to the latter aspect, the Cultural District based in the Monza and Brianza Province established a front office in charge of preventive and planned conservation. It offered services and consultancies for public and private owners on the local territory by promoting the concept of conservation as a continuous care process. On the one hand, the office supported public bodies in executing restoration works (practitioner and designer selection, call for tenders and management plan definition, project drawing checking, and

management plans, etc.). On the other hand, it organized training courses for practitioners and civil servants [23].

Moreover, the *Distretti Culturali* project consisted in the integration of different forms of cultural and economic activities on a large scale and presented a way to increase awareness and social participation in the heritage protection sector [29]. The identification and recognition of historical buildings by local citizens is a key determinant in the allocation of conservation funds.

To date, the start-up period funded by the Cariplo Foundation has ended. Some of the Cultural Districts are continuing to carry on their activities, while others are encountering greater difficulty due to governance issues and political influences. The economic scenario has now changed compared to the start-up stage (considering for example the current difficulties in activating further co-financing projects). This is why the issue of novel funding instruments and management competencies warrants further investigation [30].

The working method acquired during the *Distretti Culturali* project is currently being adopted by the foundation for other types of initiatives pertaining to fields other than cultural heritage. The Cariplo Foundation has been financing other projects directed at the preventive and planned conservation of listed and non-listed built cultural heritage for 10 years. The beneficiaries are both private owners, such as ecclesiastical entities, and public ones, especially so local municipalities, which means that neither the region of Lombardy, nor the ministry, are currently being involved [13].

## 5. *AttivAree* Project

### 5.1. *The Pre-Design Stage: Selection of Funding Beneficiaries*

In 2016, the Cariplo Foundation launched a call for the *AttivAree* (to wit, “Activate Areas”) program, an intersectoral project aimed at reactivating marginal areas located within the region of Lombardy, Italy, to reduce their degree of isolation. Indeed, the co-funding was aimed at inland areas located far from main cities and essential services (such as health, education, and public transportation), which have undergone gradual abandonment starting from the end of the economic and construction boom of the 1950s and 1960s. Nevertheless, these places are often characterized by peculiar environmental resources, landscapes, and cultural heritage sites.

*AttivAree* followed the experience gathered by way of the Cultural Districts project, which incarnates a masterpiece example as to the Cariplo Foundation’s way of proceeding as well as approaching cooperative heritage management. An aspect of great importance is the attempt to make *AttivAree* even more obviously cross-sectoral, aimed as it has been at supporting activities pertaining not solely at the cultural heritage field, but also at the social, economic, and environmental domains.

The main objectives of the initial call for ideas included: the fostering of participatory processes; the enhancement of third-sector roles and competences; the adoption of intersectoral approaches capable of integrating environmental, social, cultural, and economic aspects as well as research opportunities; the development of productive interactions between inland and urban areas; the reuse of existing buildings for the purpose of thwarting further land use. The Cariplo Foundation granted EUR 10 million to boost and innovate local economies and junior entrepreneurship, valorize cultural heritage and cultural identity, prevent and minimize hydrogeological risk, promote education, training, and scientific and technological innovation as well as the social inclusion and job placement of immigrants and new citizens, improve communication and promotion as to local resources and potential, and provide appropriate legislative advocacy [31,32].

A total of two projects won the competition and were included in the program: *Oltrepò Biodiverso* (Biodiverse Oltrepò) and *Valli Resilienti* (Resilient Valleys), which were developed in an area of the Province of Pavia and south of the river Po, and in the mutually adjacent Trompia and Sabbia valleys located in the Prealps of the Province of Brescia, respectively. Only the latter will be analyzed in the following paragraphs.

### 5.2. The Pre-Design Stage: The Economic Framework

The three-year project *Valli Resilienti* started in 2017 and ended in 2019, with some of the actions having been accomplished in 2020. The total cost of the project amounted to EUR 6,546,992, 4,444,882 of which donated by the Cariplo Foundation through a non-repayable grant and approximately 860,000 by each of the valley communities.

The mountainous-area community *Comunità Montana di Valle Trompia* acted as the project leader. The partnership involved the mountainous-area community of the Valle Sabbia, the Chamber of Commerce of Brescia, the University of Brescia, various consortiums, and many social cooperatives. In addition to these, other support partners participated in the project, such as municipalities, local museums, and schools, etc.

The main objectives of the project included: filling the structural and infrastructural gaps of the two valleys in terms of the services available to enterprises and citizens; promoting youth employment, developing social enterprises and strengthening cooperative and network models; enhancing cultural and environmental resources as a leverage for the professional growth and employment of local residents; and strengthening the local tourist business supply e.g., by better connecting those areas with nearby urban centers and lakes [31].

### 5.3. The Design and Execution Stages

The actions of the project were grouped into different drivers.

- *Valli Smart* (Smart Valleys): the activities developed within this topic were aimed at improving accessibility to services such as digital connections for both locals and non-locals. A broadband connection, a digital business registration system, and digital front offices were activated;
- *Valli Solidali* (Solidarity Valleys): aimed at promoting social relations and participation in community life, with special reference to weaker individuals as, for instance, in the case of a hostel and a bar both located in a small town, the management of which was assigned to a social cooperative aimed at empowering disabled citizens. The action included the creation of *Linfa*, a home delivery platform supporting not only weak and isolated people, but also small shops and their local products: a wide-spectrum distribution network whereby not only food, but also tourist services, medicines, and other health services are supplied, and which proved especially useful during the COVID-19 pandemic. For the sake of example, an abandoned fish farm was refurbished and is currently being managed by also including people with disabilities [33];
- *Valli Collaborative* (Collaborative Valleys): an action focused on local cultural heritage. While the stakeholders of the *Valle Trompia* decided to focus on rural heritage, those of the *Valle Sabbia* opted for industrial heritage (abandoned hydraulic power plants) after the drafting of a so-called parish map, a tool allowing locals to pinpoint the instances of cultural heritage and landscape they view as relevant and wish to leave to future generations. Such maps are often employed when planning eco-museums and provide a reliable picture of the way a local community perceives the value of its own territory, memories, past and current transformations, and condition [34].

The partners analyzed the local heritage, carried out a photographic survey, mapped it in a GIS, collected information into a database, and drafted guidelines aimed at helping local administrations, professionals, and owners understand and conserve such peculiar buildings. Shaped as they are, the guidelines reflect a set of useful best-practices for conservation interventions. They are the result of discussions with both entities involved in authorization procedures (e.g., municipal technical managers and members of landscape commissions, etc.) and authorities in charge of heritage protection (the Superintendence for Architectural and Landscape Heritage), in order to pursue some truly participatory planning with the administrative staff commonly used to interacting with local professionals.

Besides, some specific training was organized for the stakeholders, and instances of this “minor heritage” were conserved. More specifically, a rural building originally hosting a stable, a barn, and a coal storage facility was transformed into the *Rebecca Farm*, a center



for the promotion of local rural culture. It currently hosts a bed and breakfast, and a small coffee bar for locals, tourists, and those cycling along the nearby *Greenway*, a path made possible, again, by *AttivAree*. It also hosts a didactics area and a farmers' market of local produce and products (ancient and endangered vegetable species are still thriving opposite to the building) [35–43].

- *Valli Viventi* (Living Valleys): yet another action aimed at fostering sustainable tourism, which consisted in the tracing and building of the aforementioned *Greenway*, a 3,500 km cycling path system comprising as many as 74 different routes, and connecting the two valleys both with each other and with further urban, cultural, and environmental landmarks [44];
- *Un Ponte verso la Città* (A Bridge to the City): this driver comprised activities related to training, communication, and governance.

#### 5.4. The Management Stage

The above-mentioned guidelines provide owners, end users, professionals, and public administrators with methodological advice aimed not only at improving local-heritage consciousness, but also at supporting the planning of long-term conservation activities. Such guidelines, the application of which falls to the purview of local authorities, are a tool for the project evaluation activity to be performed by the Landscape Commissions. Indeed, they have also undergone an administrative procedure which led to their approval by the Municipal Councils and were adopted by some of the Landscape Commissions. In addition, the public sector has been urged to add conservation actions both to their yearly and three-year implementation plans.

As to *Rebecca Farm*, it is managed by a network of local agricultural enterprises. In terms of legal models, it is one of the early examples of this specific business network on Italian soil. Members of this agricultural enterprise were provided adequate training in order to improve their management and tourism skills. The operation is a particular type of public-private partnership, the farm owners being a private family with the concessionaire being the mountainous-area community.

## 6. Results: Conservation and Valorization, Resource Pooling, and Risk Sharing

Pursuant to the methodology adopted, an evaluation based on the parameters of “conservation and valorization”, “resource pooling”, and “risk sharing” of the two wide-area heritage projects is shown below in the shape of a scheme (Figure 1).

Thanks to these P4 initiatives, not only excellent artifacts, but also some “minor heritage” recognized as such by local communities underwent conservation and were made accessible to citizens. The programs consisted in the large-scale integration of different forms of social, cultural, and economic activities and, what is more, proved to be a viable means of increasing awareness and social participation in the heritage protection sector. Indeed, the main objective of such projects was to not only plan a strategy of cultural heritage valorization based on high-end interventions, innovative actions, and a long-term perspective, but also to integrate the cultural supply chain with the local economy and implement an innovative approach to activity management and development to be defined in cooperation with the main local stakeholders.

As to resource pooling, and in its role as the main private partner of the project, the Cariplo Foundation provided not only the capital (approximately EUR 20 million for the *Distretti Culturali* project and EUR 10 million for the *AttivAree* program) as well as debt negotiation and securing, but also long-term supervision, to wit, the checking of all activities both in terms of achievements and deadlines. In addition, the foundation boosted co-operation between the partners involved and played a proactive and systemic role consistent with any given project objective. Finally, the public partners involved (provinces, municipalities, and other local authorities) provided the assets and oversaw all tendering procedures, asked as they were to ensure not only long-term protection of cultural heritage,

but also some management skills consistent with long-time conservation and valorization of the restored historical buildings.

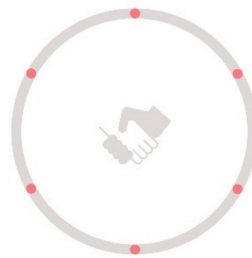
### CONSERVATION & VALORIZATION

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- Different heritage sites underwent conservation;
- In line with the definition of valorization provided by the Italian Cultural Heritage and Landscape Code, the sites at issue were also made accessible to citizens;
- The initiatives led to an overall increase in awareness of and social participation in the heritage protection sector;
- In terms of novelty, the projects were developed through the use of high-end technology and implemented through innovative actions, both of which aimed at a long-term perspective;
- The Foundation increasingly adopted a multi-sector approach, integrating the cultural heritage field with the local economy, environment, social life, thus also fostering further research;
- Regeneration of the inland areas of the Region of Lombardy through a process of social, cultural, and economic growth;
- Reuse of existing buildings in order to prevent further land-use;
- Empowerment and enhancement of the roles and skills peculiar to third-sector actors.

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- Governance-related difficulties emerged during the implementation stage, in that local administrations are fatally bound to their political mandate and thus often lack long-term visions and perspectives.
- The planning stage itself is sometimes sketchy and neglected because reflections on management issues and costs are frequently overlooked, and even when the public entities involved take these aspects seriously, practical difficulties may emerge, nonetheless.
- Liabilities have arisen in developing a number of activities due to problems with some partners.



### RESOURCE POOLING

#### CARIPLO FOUNDATION:

- Part of the financial capital (approximately 20 million Euros for the Distretti Culturali project and 10 million Euros for the AttivAree program);
- Debt negotiation and securing;
- Long-term supervision;
- Proactive participation in the development of activities.

#### OTHER PARTNERS:

- The assets;
- The management of the tendering procedures;
- The long-term protection of cultural heritage;
- The management skills.

### RISK SHARING

#### CARIPLO FOUNDATION:

- The financial risk;
- The development risk.

#### OTHER PARTNERS:

- The financial risk;
- The development risk;
  - The design risk;
- The restoration work-related risk;
- The end user demand-related risk;
  - The revenue risk;
- The operating and maintenance-related risks.

**Figure 1.** Evaluation based on the parameters of “conservation and valorization”, “resource pooling”, and “risk sharing” of the two wide-area heritage projects.

Concerning risk sharing, these experiences proved to be a textbook example as to cooperation between multiple local public and private entities. The Cariplo Foundation, the main entity in charge of this project, shared both the financial and development risks with their public partners. In addition, public entities such as building owners took upon

themselves the design, restoration, end-user demand related and/or revenue, as well as the operating and maintenance-related risks.

## 7. Discussion: Practical Examples of Territorial Capital Employment and Upstream Perspective Approaches

The conservation and valorization of cultural heritage has long played a fundamental role among the actions of the programs being presented. By definition, cultural heritage is part of territorial capital as a whole [45–47].

Starting from the recognition by the communities, the *Distretti Culturali* and *Valli Resilienti* projects were aimed at turning vulnerable heritage into one of the occasions capable of triggering the overall regeneration of these areas. The interplay between public and private funding, the care for the historical-artistic heritage, and the latter's interaction with other value-added sectors allowed to beget growth processes and capacitation [30,48], as already proven during the 1990s in the case of the Halland Model in Sweden [49,50]. Indeed, cultural heritage allowed for the development of a cooperative valorization model in the local territory, which is based on virtuous interactions between cultural heritage, production chains, investments in human capital, service innovation, and long-term visions. Though logical and rational in nature, this model nonetheless differs from practices commonly resorted to by Italian politicians and bureaucrats [51].

Moreover, international agendas have recognized the pandemic as an opportunity to rediscover local territories and communities. Among the objectives recently defined are the development of strategic spatial planning, place-based investments, and social inclusion [52,53].

In reference to public buildings, some governance-related difficulties emerged during the implementation stage, in that local administrations are fatally bound to their political mandate and thus often lack long-term visions and perspectives. Besides, the planning stage itself, too, is sometimes problematic and neglected because reflections on management issues and costs are frequently overlooked, and even when the public entities involved take these aspects seriously, practical difficulties may emerge, nonetheless. Finally, liabilities have arisen in developing a number of activities due to problems with some partners.

As to *Valli Resilienti*, the project aimed to be a lever for development and provide these areas with some tools, increasing its resilience. The latter concept can be defined as “The ability to react, [and] is based on the solidity of relationships and skills” [49]. Besides, the different activities implemented during the project are but an expression of the upstream approach described in the final report of the European Project “Cultural Heritage Counts for Europe”, which implies the enhancement of traditional investment schemes with resources stemming from other domains [54]. The *Valli Resilienti* project highlighted the problems inland areas are facing in an attempt to solve them, thus anticipating a topic which has gained center stage as a consequence of the COVID-19 pandemic. A territorial approach is emerging; inner and depopulated areas may well succeed in tackling the crisis caused by large urban agglomerations by resorting to their utterly peculiar resources [55].

## 8. Conclusions

Oriented as they are to timely funding focused on individual buildings, at least in relation to built cultural heritage, the small- and mid-sized private and public institutions occurring within the Italian context rarely manage to invest in projects as multifaceted as the one developed in Lombardy by Fondazione Cariplo. Instead, the *Distretti Culturali* and *AttivAree* projects consisted in the integration of diverse forms of cultural and economic activity by way of a multi-sector approach.

Once the cultural heritage world has started collaborating with other sectors, private institutions are left with no alternative but to become more deeply involved as well. In addition to a mere building of bridges to link public institutions with the business sector, some strong involvement of society as a whole is advised here in order to foster the implementation of projects and expedite the solution of shared problems.

The two projects described herein may well serve as examples, and the lessons learnt are suitable for adoption in the development of future projects, in that they call for:

- Greater care for the historical-artistic heritage;
- Closer interaction between the cultural heritage and other value-added sectors;
- A well-established interplay between public and private funding;
- The encouragement of private stakeholder participation, with special reference to the latter's cultural closeness to the territory involved;
- The recognition of how critical the planning stage is, thus taking into account management, and costs-benefit-related issues from the very beginning;
- The recognition of how critical the planning stage is, thus taking into account management and costs-benefit-related issues from the very beginning;
- A long-term vision to permeate every action.

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