

**INNOvating policy instruments for historic CASTLEs, manors and estates**

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**PROVINCE OF BADAJOZ**

**ACTION PLAN**

**March 2021**

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INNOCASTLE Draft Action Plan

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Date: 16/03/2021

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# GENERAL INFORMATION

**Project** **INNOCASTLE (PGI05215):** INNOvating policy instruments for historic CASTLEs, manors and estates

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**The Action Plan aims to impact:** √Investment for Growth and Jobs programme

€ European Territorial Cooperation programme

€ Other regional development policy instrument

**Name of the policy instrument addressed:**

* ERDF Operational Program (2014-2020) in the region of Extremadura; Objective 6.3.1” To boost the protection, promotion and development of the cultural heritage”. Priority for investments number 6: “The preservation, promotion and development and natural heritage”.
* ERDF Operational Program (2021-2027) in the region of Extremadura

# INTRODUCTION

## INNOvating policy instruments for historic CASTLEs, manors and estates (Innocastle)

The Innocastle project aims to ensure the sustainable conservation of historic castles, manors and estates (HCME) in four participating EU regions: Transylvania (Romania), the Gelderland (The Netherlands), Flanders (Belgium) and Badajoz (Spain). It will do so by revising existing policies to better reflect future requirements and trends such as place-based approaches, the need for economic and environmental resilience, and multi-actor involvement. Innocastle will develop and implement four Local Action Plans targeting four specific policy instruments which involve HCME before the end of 2022.

Specific objectives of Innocastle are:

1) Governance and partnerships: Underline the importance of cross-sectoral, multi-level governance, place-based approaches. This is based on quadruple helix partnerships (university-industry-government-public) for the sustainable conservation and revitalization of HCME (from the perspectives of conservation, climate resilience, programming and promotion). The project will evaluate the benefits of these approaches in the baseline survey, develop policy recommendations and implement frameworks for supporting this policy transition through the Local Action Plans in the four policy instruments.

2) Finance and investments: Increase the amount of public and private financing for programming and promotion of HCME by 10% in the partner regions by 2022 through adapting public policy, support measures and tax instruments to better promote public and private investment into HCME.

3) Promotion and visibility: Increase knowledge and skills of local and regional policy makers to better promote and facilitate the regional and interregional connections of HCME through storytelling, cultural routes and product development.

4) Dissemination and continuation: Open a European-wide discussion about the future of European HCME involving policy makers, local, regional and national authorities, but also owners, non-profit organizations, education institutions, civil society and creative visionaries by organizing open events and investing in an active community in sharing and expanding knowledge on this niche topic.

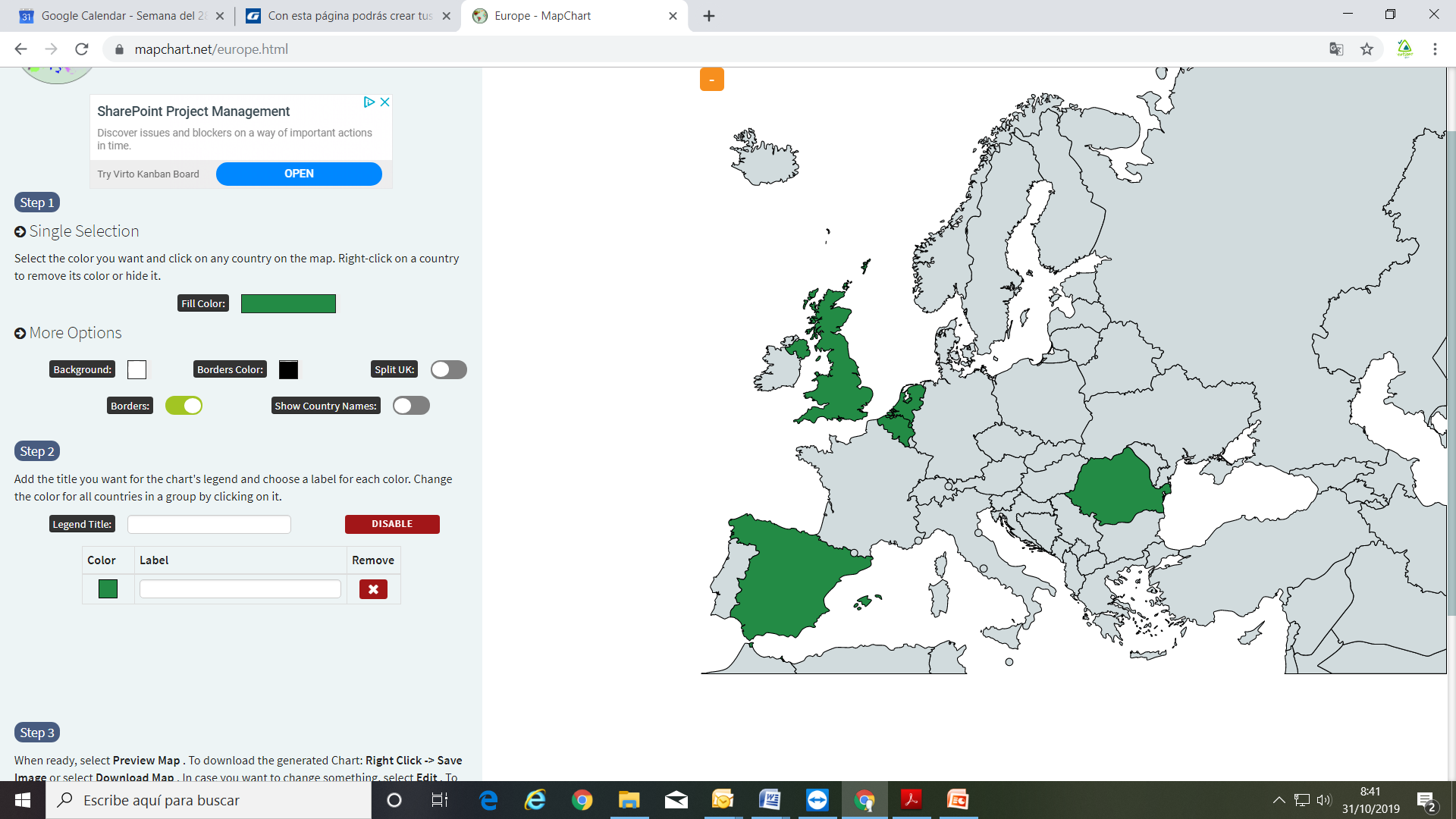
The central issue addressed in Innocastle is that in most European countries, current policies towards conservation, transformation and exploitation of historic castles, manors and estates are outdated and do not reflects the real needs and opportunities of HCME.

The project revolves around the idea of valorising one of Europe’s least known and particular forms of heritage, its HCME. Mostly located in rural and remote areas, HCME are often unknown to the general public and tourists. They have the potential to become powerful drivers for rural development and innovation. However, this requires a shift of paradigm in governance and support. Innocastle aims to revitalize these hidden treasures by adapting policies to further empower local stakeholders, private investors and cross-sectoral partnerships.

The partnership of Innocastle consists of experienced regions and knowledge partners which are collecting existing best practices, producing a rigorous analysis of the existing policy bottlenecks and catalysing results into new and innovative regional policies and actions. Through the policy instruments, partners strive to unlock the potential of these assets for a wider range of actors in order to enhance regional and sustainable development.

The Innocastle approach is innovative and holistic. It involves a wide range of stakeholders based on the integrative quadruple helix structure. This way, it aims to ensure an optimal and sustainable valorisation of HCMEs and uptake of integrated knowledge and experiences on all levels.

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| Figure 1: INNOCASTLE regions |



Project partners:

• National Institute Heritage. Romania (Project Leader)

• University College Ghent. Belgium

• Diputación de Badajoz. Spain

• The National Trust for Places of Historic Interest and of Natural Beauty. United Kingdom

• Province of Gelderland. The Netherlands

Regional Local Action Plans

Produced by each participating region, a Local Action Plan (LAP) is a document providing details on how the lessons learnt from the Innocastle cooperation will be developed in order to improve the policy instrument addressed within their region. It specifies the nature of the activities to be implemented, their timeframe, the players involved, the costs and funding sources.

Based on the baseline survey study undertaken by the participating regions, the identification of best practices and the exchange of experiences (through seminars, meetings and workshops)*,* which have been carried out to facilitate the process of interregional learning, knowledge transfer and dialogue between internal and external stakeholders, together with an active involvement of regional stakeholders (meetings, workshops, interviews) during the two years of the Phase 1 of the project, we have identified a set of activities and practices that will have a positive impact on policy instruments for historic castles, manors and estates in Extremadura.

The University of Ghent (Be) and the National Trust (UK), in collaboration with all project partners, designed a comprehensive framework to study each participating region by means of a common approach, in order to establish the initial situation for each of them and to determine how to reflect the lessons learnt during the project in local programs and policies.

This common framework included, among other actions, a series of studies carried out in each region:

* Study of each national context
* Identification and definition of case studies
* Study of relevant Government policies
* Study of main local stakeholders
* Identification of best practices
* Meetings with local key actors and stakeholders for the identification of needs and for the designing and validation of LAPs.

The Province of Badajoz has elaborated a template with recommendations for all partners for the design of the project Local Action Plans.

This Local Action Plan elaborated by the Province of Badajoz is based on the best practices and knowledge learnt during the exchange of experiences, thematic seminars and study visits implemented in Romania, The Netherlands, The UK, Spain and Belgium.

Challenges to be faced identified in the baseline survey and stakeholders’ meetings:

* Lack of comprehensive inventories for HCMEs: Many of the private castles and historic villages are not included in the inventory of the Regional Ministry for Culture, and the information registered for those inventoried is very limited. It is important to create information sheets for every element including ownership, its past and current use, elements of interest or activities carried out in the property. A complete inventory is the first step for any program directed towards HCMEs.
* Absence of specific fiscal measures and/or subsidies focused on HCMEs/ Lack of heritage exploitation programmes and projects/ Lack of an exploitation strategy for a good part of the restored HCMEs: There are not tax incentives or specific programs for financing actions towards the restoration and exploitation of HCMEs in the Region. Some of the Castles were successfully restored in the past but they are not being exploited or have any use at this moment.
* Scarce or no future foreseeable public funding for restoration: The Regional budget foreseen for the next period does not include public funding for restoration.
* Scarce public-private partnership experience and framework: there are not good examples of public-private cooperation in the exploitation of Castles in the region. There are some good examples of festivals in important heritage sites where public authorities cooperate with private entities that should be studied and transferred to HCMEs.
* Difficulties of most of castle proprietors to afford restoration and maintenance: The high costs of restoration and maintenance, difficult situations with regard to inheritance issues and multiple owners, and the lack of public funds are some of the causes.
* A lack of general public awareness of the problem: The general public is not aware of the importance and the potential socioeconomic impact that HCMEs can have in their community.
* Absence of communication structures or tools to allow collaboration between different administrative bodies and with the private agents: The communication and cooperation between public authorities with competences in heritage management is very limited. There are not permanent structures for cooperation and communication.
* Poor marketing and valorisation of HCMEs: Although natural and cultural heritage are two of the main elements in touristic campaigns for the region, only a low percentage of HCMEs are part or appear in touristic marketing campaigns.

Goal for LAP intervention/implementation:

* Modification of existing regional heritage policies for more efficient protection and promotion of the regional Heritage.

Summary of proposed activities for implementation:

Taking into account regional heritage challenges, lessons learned from the interregional exchange experiences process as well as stakeholder needs/interests, and considering the availability of resources, the following activities have been chosen to be implemented within this LAP:

1. Creating a Technical Committee for regional heritage management and promotion

2. Establishing a comprehensive Regional Heritage Inventory including private assets

3. Designing and promoting a harmonized framework for heritage tax treatment at regional level and proposal for the National authority

4. Promoting Regional heritage through the application of innovative tools and participation.

# REGIONAL CONTEXT.

## General Information

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| Resultado de imagen de extremadura en europa | Resultado de imagen de mapa de extremadura y badajoz, dentro de españa |

Extremadura (capital: Mérida) is located in the southwest of the Iberian Peninsula. Its territory covers an area of 41,634km² - roughly 8% of the whole surface of the country - and it is divided in two provinces: Badajoz and Cáceres. In 2018 the region had 1,070,453 inhabitants (Eurostat, 2019), being one of the least populated zones of Spain and continuing the negative natural growth rate trend registered during last years (Instituto Estadístico de Extremadura–IEEX). Despite recent recovery signs from the financial crisis, the economy is lagging compared to the rest of the country, and its research, development and innovation system is among the least advanced. Extremadura is the only Spanish region categorized as less developed by the European Commission. However, Extremadura has many potentialities. Renowned for its environmental biodiversity and famous high quality traditional food products such as jamón ibérico, cheese and olive oil. Furthermore, it has a beautiful landscape where the dehesa (meadows with evergreen Quercus trees) stands out, and a rich historic heritage. Both features are the pillars of the incipient touristic sector focused on the quality of life, health and wellbeing of the tourist, integrating an enjoyable rural and eco-friendly experience.

Badajoz province presents a contrasting Mediterranean landscape, combining pastures with oak woods, irrigated crops, rolling hills and mountains. Most of the terrain is flat along the Guadiana River basin. Extensive livestock raising is important in the Region. The main Industrial area, primarily agricultural processing industries, is concentrated in Badajoz city, Mérida, Almendralejo, and Villanueva de la Serena. The capital city in the region is Mérida (the regional administrative capital and UNESCO site). The climate is characterized by long, hot, dry summers.

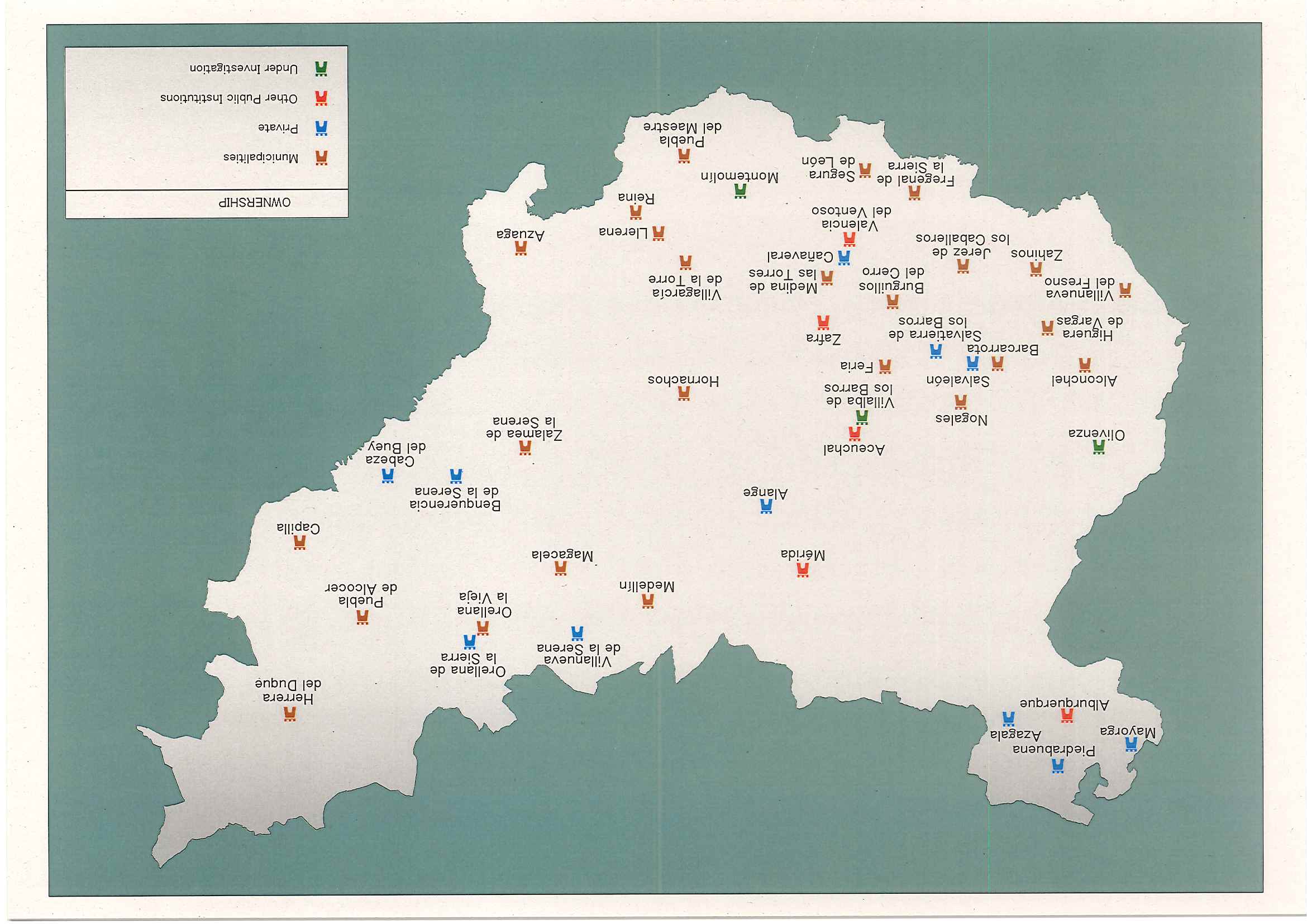
Extremadura borders with Portugal and it is close to the cities of Madrid, Sevilla and Lisbon. This location constitutes a geostrategic advantage that has not been exploited to its fullest potential so far, although there are already some efforts placed in this regard. The density of the population is one of the lowest in the country and it is irregularly spread across the region. Nearly 30% of the inhabitants are concentrated in the cities of Badajoz, Cáceres and Mérida and, therefore, Extremadura can be considered predominantly rural. The average age is 44 years old and demographic trends show an increasingly aging population. This phenomenon is aggravated by migration movements.

In 2017 the gross domestic product (GDP) in Extremadura reached €18.8b, the highest since 2010, yet it continues to be one of the poorest regions in Spain (Eurostat, 2019). The average income of €19,475 (INE, 2019) is, in fact, the lowest within the country. According to Eurostat, the latest available figure for GDP per capita in purchasing power standards (PPS) was €19,300 in 2017, a figure which has been slowly increasing since 2013 (16,600). This ranks Extremadura in the last position among the 17 Spanish autonomous communities, below both the national (€27,600) and (€30,000) EU averages (Eurostat, 2019). The main component of the regional gross value added (GVA) is the tertiary sector; accounting for 69.2% of the total, followed by the secondary sector responsible for 22.0% (of which construction constitutes 7.4%) and finally, the primary sector that represents 8.9%. Unlike the national trend, the primary sector holds a significant weight in the economy of Extremadura while services are slightly behind of the figures seen in the rest of the country (Eurostat, 2019). Two of the most important rivers in Spain (Tagus and Guadiana) cross the territory making it very productive for agriculture. In consequence, the regional products have a high-quality and therefore, the activities related in any aspect to this sector enjoy greater importance than in other parts of Spain. For instance, Extremadura is one of the biggest producers of tobacco, even though, alternative crops are being implemented because of non-smoking trends. Industry is also influenced by its close ties to agriculture as the majority of activities performed are linked to it. In the same sense and thanks to its climate conditions renewable energy has great potential with photovoltaic energy standing out. Accordingly, it can be concluded that Extremadura’s economy relies greatly on its natural resources.

With regard to the service sector; the non-market services are to be highlighted as they account for almost 27.2% of the GVA. The dispersed and aging population has contributed to develop a very efficient network of health, education and administrative infrastructure. In fact, the social services in Extremadura are used as a model of good practise for regions showing similar characteristics. Tourism is also gaining prominence thanks to the region’s natural and cultural. According to INE (2019), the active population of the region during 2018 numbered 378,900 people (1.96% of the national employment), with the services sector standing out from the other sectors with 71.91% of the regional total, and with the secondary sector (industry including construction) totalling 14.49%, while the primary sector of the economy accounted for 13.61%. However, unemployment is one of the biggest challenges faced by Extremadura. In 2018 the unemployment rate was 23.7% (117,300 people), with youth and women the most affected segments of the population. This figure is considerably higher than the national and EU average of 15.3% and 6.9%, respectively (Eurostat, 2019).

Extremadura is characterized by its limited industrialization, mainly agri-food activities, and its low competitiveness. This can be largely explained by the lack of an entrepreneurial culture, insufficient private investment and the weak cooperation between the public and private sector. The low development of ICTs in the region is also an important factor that affects industry expansion in Extremadura. The region, however, has identified various distinctive strengths and shows promising capabilities in regard to sustainable development. The promotion of strengths would lead to a more competitive model, supporting the growth of the region with its beneficial consequences for the society. The Junta de Extremadura aims to achieve this objective by promoting a closer cooperation between academia and the productive sectors, by attracting talent and favouring the specialization in relevant areas for the region, and exploiting its potentialities as defined in the Strategy of Smart specialization RIS3. The natural resources and the introduction and expansion of the use of new technologies will be decisive to boost manufacturing capacity. However, changing the current situation requires an important effort. In 2016 the number of high-medium tech manufacturing industries was 7 and the number of high-tech services 37, which together employ only 173 workers (INE). These figures, among the lowest in Spain, illustrate the difficult industrial landscape that faces Extremadura in growing its manufacturing industry. For this reason, the regional government has implemented several programs to help industry overcome the present situation. Besides the RIS3, it has activated the following initiatives: Plan EMFOCO for the entrepreneurship and promotion of the business competitiveness; VI Regional RDI Plan, Strategy for the Internationalization of the Economy of Extremadura, an update of the Strategy for Industrialization, and the Regional Framework for Developing a Green and Circular Economy. Each one of these programs addresses some of the obstacles identified in the industrial sector.

Regarding HCMEs, in Extremadura:



Visitors will find across Badajoz province, castles, Arab citadels, Roman ruins and historic Jewish quarters, as well as the chance to explore historic routes such as the Moorish Route (Ruta Mudejar[[1]](#footnote-2)) or the Silver Route (Via de la Plata route[[2]](#footnote-3)). The Mudejar Route consist on a travel journey going through the cultural and architectonic Moorish remains along 13th and 16th centuries. On the other hand, the Silver Route, which runs from Asturica Augusta (Astorga, León) to Emerita Augusta (Mérida, Badajoz), was one of the main roads which made up the backbone of communication in Hispania during Roman Empire, crossing the peninsula from north to south. The Extremadura section of the Silver Route is a beautiful route which passes through some of the most significant localities in the region. Overall, places of interest include the historic quarters of towns such Alburquerque, Jerez de los Caballeros, Olivenza and Zafra, and particularly the capital, Merida, whose archaeological site has been awarded the UNESCO World Heritage designation.

An important portion of the HCMEs connected with castles is defined at the Web of the “Asociación Española de Amigos de los Castillos” (Spanish Association of Friends of Castles). At the national level, 10.378 heritage assets related to castles and defensive elements (castles, fortified sites, towers, defensive walls, etc.) have been recorded by this Association. In the case of Badajoz province, 174 assets are registered.

In addition to this heritage list, and in regard of HMCEs not directly related to castles, Badajoz province also has a large number of historical rural houses, mostly private, usually located at the countryside and related to agriculture or livestock farms and properties. No official list has been assembled identifying this unique architectural category. Since ownership is still private and these houses are not publicly protected, maintenance depends exclusively on the owners. Despite being private, some limitations or regulations are applied when restoring a historic building or when an extension of the building is planned, mostly due to environmental policies.

If we compare these historic houses with the manors observed during the project visit to the Netherlands or Romania, for instance, there are important differences. Historic country houses in Extremadura region are generally “humbler” as they were used in the past for employee’s accommodation or for short stays of the land owners, related to hunting, supervision of agriculture operations, etc.

Taking all this into account and for the case of Badajoz province, the concept of HCME to be used in this report will refer only to castles and historic houses, rather than other patrimonial assets, such as manors, palaces, even though some of them have defensive elements into their structures. The lack of information about these assets and the availability of inventories referring only to castles is the reason for this decision.

Research using the above-mentioned Website[[3]](#footnote-4) (“Asociación Española de Amigos de los Castillos”) and filtering by “Medieval Military Castle” and “Medieval and Palatial Castle”, has revealed 66 historic castles in the province.

Although there are some castles built in Badajoz province before the 12th century as well after the 16th, most of the catalogued historic assets belong to the period from the 13th to 15th century. The Extremadura region was a frontier territory and a scene of wars until the “Christian re-conquest” against Muslims was completed, up to middle of the 13th century. During the period of Christian conquest, castles were predominantly built to have a protective and defensive role, so strategic positions (highest enclaves and broadest horizons) determined the site selection for the castle building. This is the main reason why the region's topography partially explains the castle location and distribution across the territory during this period of history.

From the 13th century, castles although still pursuing defensive functions, started to evolve towards manor or residential houses of the richest and more powerful families. Reasons other than military or defensive motivated the choice of location of new castles. Economic activity and strategic national and regional routes were other determinant in the selection of sites for building castles in this period.

Through data analysis of the 66 castles, 33% of the rural estates can be found on the higher grounds of city and village centres and 67% outside municipal borders or in more rural areas at strategic positions. Only 40% of the analysed castles are connected or own their surrounded land (mostly nature). Roughly 60% are, except for the built or walled land, not tied to any land at all.

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| **Source**: own elaboration from /www.xn--castillosdeespaa-lub.es/es/buscador-castillos and www.extremaduramedieval.es/ruta-de-los-castillos-de-extremadura/ |

The majority largest part of the castles is state-owned and this is in direct relationship with their accessibility as well as with the function of the building. 33% of the privately owned estates are (in some way) open to the public as well.

More than half of the castles are in poor condition and this is in 87% due to the lack of a function. Further investigation should be carried out to understand the causes, but issues such as inheritance problems or the lack of funds are some of the causes behind this situation Most of these are state-owned and some of them are in a ruinous state. Not many of them are open to the public, but this is due more to a lack of management than to an active policy. We are not sure at this moment about the reason why these domains are publicly owned, but political decisions taken into a period of socialist governments influenced this factor definitively. Social movements also demanded the expropriation of different castles from private hands to be owned either by the municipalities or regional governments.

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| **Source:** own elaboration from /www.xn--castillosdeespaa-lub.es/es/buscador-castillos and www.extremaduramedieval.es/ruta-de-los-castillos-de-extremadura/ |

The average distance between two castles is 23km in the region. Certainly, in specific areas (such as the south-west of Badajoz) in which the domains are spread homogeneously throughout the region this distance is smaller and can be saved easily.

A 33% of the castles lie directly within a city or municipality, and a further 40% directly border a municipality. Thus over 70% have a direct (potential) connection with the centre of a municipality which means they are located in accessible locations.

The castles have potential if their relationship with the municipalities can be activated in terms of local involvement and public participation and if the often-ruinous condition can be used as an advantage in their redevelopment.

## Local/Regional analysis of the current situation of HCMEs

A SWOT analysis of HCMEs leads to the following observations:

**SWOT analysis**

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| STRENGTHS | WEAKNESSES | OPPORTUNITIES | THREATS |
| * Quality and quantity of HCMEs. * Previous efforts to restore most of the publicly owned historical estates has already been carried out with success (good condition of important castles) * Access to Structural Funds for the next programming period * An important part of the HCMEs are publicly owned. * A will to collaborate among different administrations * Most HCMEs are located in attractive natural and rural touristic areas. | * Scarce or no future foreseeable public funding for restoration. * A good number of restored HCMEs s are closed.      * Little experience of public-private partnerships. * Most of the castle proprietors have difficulty to afford restoration and maintenance works. * A lack of general public awareness of the problem. * A lack of communication structures or tools to encourage collaboration between different administrative bodies and with private agents. * Poor marketing and valorisation of heritage resources. | * Innocastle project. * The awareness raising from the general public. * Existing NGO and CSO associations favouring castle protection. * Increase in general interest for visiting cultural and heritage sites. * Increase in the interest in inland tourism. * Strong efforts to avoid rural depopulation. | * Significant number of castles highly degraded and in risk of collapse. * The foreseen government budget for heritage projects is very limited due to a foreseen cut of SF in the region.      * Depopulation in rural areas. |

## Policy instrument to be addressed by this LAP

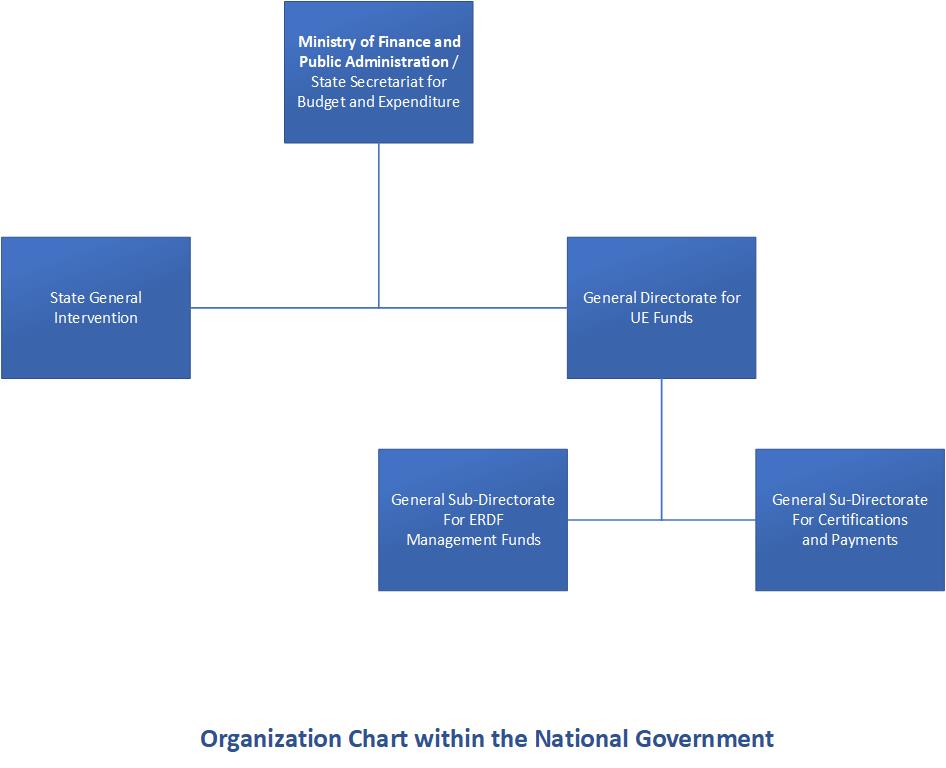
Describe the policy instrument you will improve with your LAP (the same as the one included in the proposal of the project)

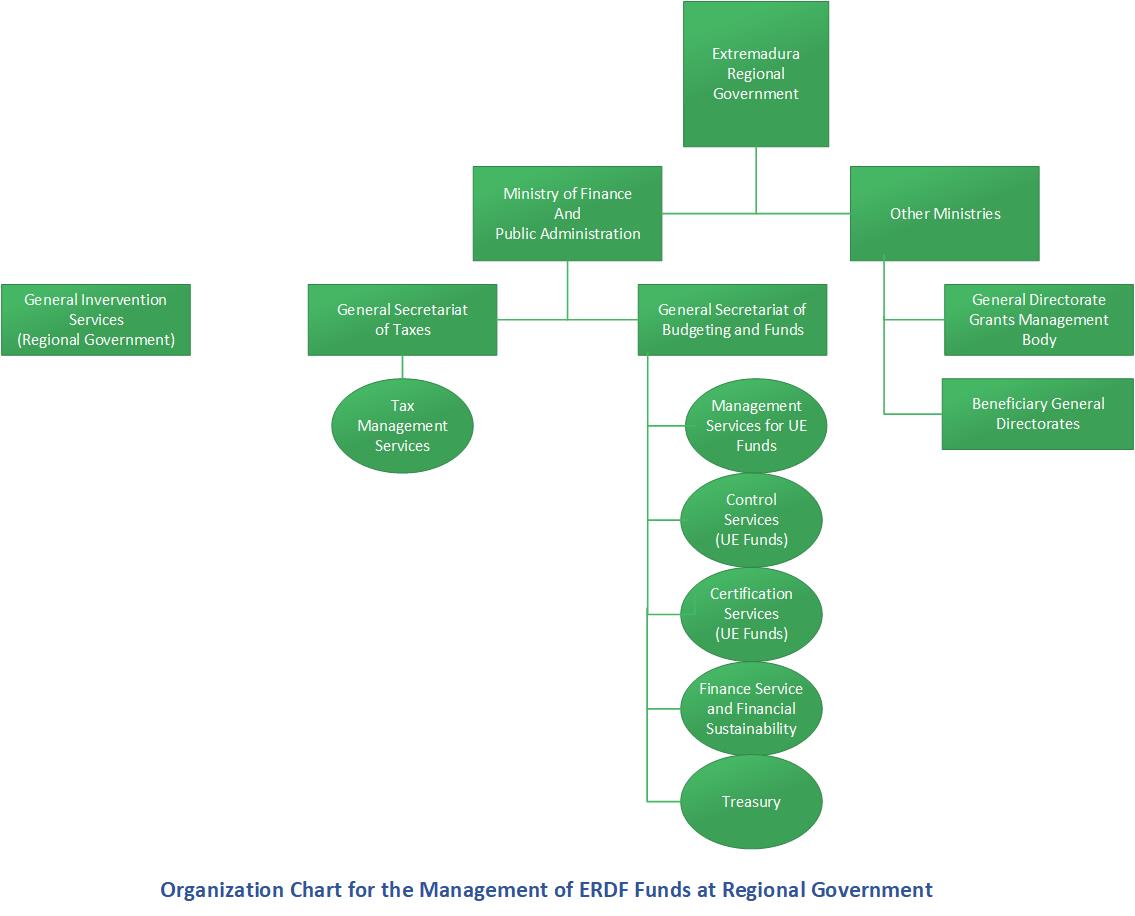
**Target policy instrument**

The selected target policy instrument is the ERDF Operational Program for Extremadura 2014-2020.

The Management Authority of the Operational Program RDEF Extremadura 2014-2020 is the General Sub-Directorate of ERDF Management of the regional government, which is the regional equivalent of the General Directorate of Community Funds of the National Ministry of Finance and Public Administration and depends on the latter.

The internal organization of Public Authorities involved (national and regional) are shown in the following diagram





Extremadura ERDF Operational Program (2014-2020); Objective 6.3.1” To boost the protection, promotion and development of the cultural heritage”. Priority for investments number 6: “The preservation, promotion and development and natural heritage”.

The main objective of this policy instrument is the valorisation of cultural and natural heritage resources of the region. One of the main actions to be funded under this priority is the creation of natural and cultural itineraries in order to promote sustainable tourism and the economic development of rural and urban areas. The creation of digital resources is also included.

The Innocastle project will help in the identification and design of tools and actions for the effective implementation of programs under the addressed policy instrument. The policy instrument will be improved during the Interreg project through the identification and adaptation of best practices from other EU regions. Other partners can also study the actions implemented in Extremadura for cultural heritage and sustainable tourism.

The operational program objective 6.3.1 for the promotion of heritage is not limited to protected heritage sites or even listed sites. However, protected sites (BICs – Goods of Cultural Interest) have a recognized status of protection and this can play a role in the distribution of the funds.

**Heritage policy**

The legislative powers and responsibilities affecting the historic heritage assets in Extremadura are defined as follows:

* National Level (Central Government): takes the responsibility for preserving and maintaining the historic heritage of Spain through Law 16/1985 (June 25th). From a fiscal point of view, the National Government charged with regulating the State Taxes (VAT, Corporate Income Tax,) and those ones assigned to the Autonomous Communities (IRPF-personal income tax; wealth taxes; inheritance duty and gift tax; tax on the transfer of assets).

These laws defined the BICs (Goods of Cultural Interest), these elements get the maximum category for protection. The law was transferred to the Regions in the 1980s and from that time onward Regional Governments were competent to declare what elements are included in the list of BICs.

* Regional Level (Autonomous Community Extremadura):
* The regional government manages the Historical Heritage through Law 2/1999 (March 29th) and its amended Law 3/2011 (February 17th). From a fiscal point of view, this law complements the national tax law, on an annual basis.
* In Extremadura, the Law 2/1999 for Cultural and Historic Heritage of Extremadura, following the Law 16/1985 maintain the category of BICs to goods that can be movable, immovable or intangible The BICs are classified for the purposes of their declaration as a monument, Historic site, historic garden, historic site, archaeological area, paleontological zone, places of ethnological interest, archaeological parks, archaeological protection areas. The declaration is made by decree of the Government of Extremadura, in the framework of a proposal of the Regional Minister for Culture, after the completion of a special procedure regulated in the National Heritage Law. The list is dynamic, meaning that new elements can be incorporated every year. The declaration of BIC implies maximum protection for the declared assets; any intervention in them requires the prior authorization of the Regional Ministry for Culture and implies the recognition of unique historical and cultural values that must be safeguarded and preserved for future generations. Extremadura also establishes a second category: Inventoried good of historical and cultural heritage of Extremadura

The ‘Inventoried goods of historical and cultural heritage of Extremadura’ includes those assets that, not being declared as BICs, have special characteristics worthy of being preserved as integral elements of the regional historical and cultural heritage, and will be included in the Inventory of Historical and Cultural Heritage for research, consultation and dissemination purposes.

Another category is the “remaining assets of the Historical and Cultural Heritage of Extremadura” which are the immovable, movable and intangible assets that, despite not having been subject to declaration or inventory, possess the values described in Article 1 of the Law 2/1999 (goods that for having an artistic, historical, architectural, archaeological, paleontological, ethnological, scientific, technical, documentary and bibliographic interest, deserve a special protection and defence. Also, archaeological sites, natural sites, gardens and parks that have artistic, historical or anthropological value, urban areas and elements of the industrial architecture as well as rural or popular elements and the ways of life of the people and its language that are of interest for Extremadura).

* LAW 6/2018, of July 12, of amended of Law 2/2011, of 31 of January, development and modernization of tourism in Extremadura

The management of tourism and the promotion of Extremadura as a tourist destination, taking into account its environmental, cultural, economic and social context. Likewise, promote sustainable tourism development based on territorial, social and economic, and limited according to the carrying capacity that is, if necessary, determined for visits to sites or protected areas.

* Municipalities: Municipalities can establish specific fiscal measures in accordance with the Regional and National Laws and specifically with the Royal Decree 2/2004 (March 5th).

In addition to the above-mentioned laws, financial support is provided to historic heritage proprietors in the framework of the program "Programa 1,5% Cultural" from the National Ministry of Development (“Ministerio de Fomento”), consisting of financial support to carry out maintenance activities for heritage assets. Municipalities or private institutions can apply for this support only if the asset is catalogued as “Property of Cultural Interest”.

# PROPOSED INTERVENTION TO SOLVE THE PROBLEM

After analysing the situation of HCMEs, the following challenges have been selected for consideration in the development of specific action for the improvement of heritage policies in the Region of Extremadura:

* Lack of comprehensive inventories for HCMEs
* Absence of specific fiscal measures and/or subsidies focused on HCMEs/ Lack of heritage exploitation programmes and projects/ Lack of an exploitation strategy for a good part of the restored HCMEs
* Scarce or no future foreseeable public funding for restoration
* Scarce public-private partnership experience and framework
* Difficulties of most of castle proprietors to afford restoration and maintenance
* A lack of general public awareness of the problem
* Absence of communication structures or tools to allow collaboration between different administrative bodies and with the private agents.
* Poor marketing and valorisation of HCMEs

Taking into account the SWOT analysis reflected in this document and the identified challenges, the following actions have been suggested within four strategic axes:

1. **Establishing efficient technical coordination structures and models for HCMEs management.**

* Creation of stable coordination and management structures including regional, provincial and municipal representatives to ensure continuous communication, coordination and technical support for programs or actions related to heritage management and promotion.

1. **Elaborating a complete Regional Inventory of HCMEs including private properties**

* Identification and study of private heritage elements of interest and updating of the information available for public HCMEs in order to elaborate a complete updated inventory (GIS based digital map of HCMEs in Extremadura). The inventory will include information of interest such as condition and information on past and current use.
* Use and consultation of such inventory for the future promotion and implementation of programs and actions for HCMEs.

1. **Identifying legal and fiscal barriers/tools for the efficient management of rural estates**.

We are describing here an ideal scenario, but clarifying that some tasks of this action are beyond the action policies of the Regional Authorities involved in the LAP

* In order to facilitate the enforcement of different protection levels, it is crucial to obtain a unification of criteria among the different Public Administrations involved (National, Regional and Local administrations), on the legal definitions of “patrimony, cultural and artistic heritage”.
* Once the corresponding protection level for each individual asset is determined, it is necessary to decide on the fiscal benefits, i.e., tax exemptions or subsidies, aiming to improve the asset situation (maintenance, restoration), preferably retaining the same ownership.
* To establish a Tax regime that supports investment in historic properties (through tax exemptions for VAT, etc.) among the different Public Administrations, taking into account the tax revenues and the costs incurred concerning the heritage assets.

In a long term, the above-mentioned objectives will be a starting point for promoting the following final aims:

* To initiate a harmonized tax treatment in Extremadura for HCMEs that in the future would establish a basis to develop a unique National Heritage Protection Law (Spain) with a clear definition about the obligations of each Public Administration concerning the “patrimony, cultural and artistic heritage” in Spain.
* To promote a European Directive on Heritage Protection, mandatory for all States Members, defining clearly the general objectives to be achieved for each country according to its legislation.

1. **Designing better promotion and marketing of HCMEs, involving the local communities through active participation**.

* To identify and analyse good practices of promotion, marketing and valorisation of heritage resources and participation
* To develop efficient communication and promotion tools and mechanisms to foster awareness on the value of their heritage from the general public
* To strengthen the promotion and creation of digital resources for the involvement of the local community in creating digital materials for the touristic promotion of their heritage:
  + Province of Badajoz to build up a digital platform
  + Municipalities to be involved in the development of local initiatives and elaboration of promotional materials to be available for authorities
  + Local Schools/associations involved in the implementation of local programs and elaboration of materials
  + Regional government and Province of Caceres to be involved in the elaboration and production of materials for heritage promotion
  + All of them involved in the use of materials and programs available in the platform

# STAKEHOLDERS INVOLVED

The following table provides a list of the stakeholders involved in Innocastle.

| ENTITY | NATURE | FIELD OF ACTIVITY/COMPETENCES | INVOLVEMENT |
| --- | --- | --- | --- |
| General Directorate for Heritage promotion (Extremadura) | Regional Authority | Regional Authority with competences in Heritage conservation and promotion | Participation in stakeholder meetings, study visits and seminars and in the elaboration and validation of the LAP |
| General Directorate for tourism (Extremadura) | Regional Authority | Regional Authority with competences in touristic promotion | Participation in stakeholder meetings and seminars |
| General Directorate for Education (Extremadura) | Regional Authority | Regional Authority with competences in training and education | Participation in stakeholder meetings and seminars |
| General Directorate for Funds (Estremadura) | Regional Authority | ERDF Managing authority | Participation in stakeholder meetings and seminars, and in the elaboration and validation of the LAP |
| General directorate for Finance (Extremadura) | Regional Authority | Regional Authority with competences in taxes treatment | Participation in stakeholder meetings and seminars |
| Diputación de Badajoz | Provincial Authority | Provincial authority with competences in taxes for HCMEs and promotion of HCMEs in the province of Badajoz | Participation in stakeholder meetings study visits and seminars and in the elaboration and validation of the LAP |
| Diputación de Cáceres | Provincial Authority | Provincial authority with competences in taxes for HCMEs and promotion of HCMEs in the province of Cáceres | Participation in stakeholder meetings and seminars |
| Municipalities | Local authority | Local authorities with public HCMEs of interest in their municipalities/ involved in the management and promotion of local HCMEs and | Participation in stakeholder meetings and seminars (Municipalities of Alburquerque, Zafra, Badajoz, San Vicente de Alcántara, Nogales, Entrín Bajo) |
| Association of Municipalities | Local authority | Association of small towns (County), some of them promoting activities for heritage promotion and tourism | Participation in stakeholder meetings and seminars |
| Private HCMEs owners | Private owners | Private owners of HCMEs | Participation in study visits, seminar and identification of Best Practices (BP) (owner of the castle of Piedrabuena) |
| Spanish Society “Friends of Castles” <https://www.xn--castillosdeespaa-lub.es/es> | Private Association | Private owners association | Participation in stakeholder meetings, study visits and seminars and in the elaboration and validation of the LAP |
| University of Extremadura (Uex) | University | Advisor for policies | Participation in stakeholder meetings and seminars |
| Red Extremeña de Desarrollo Rural <https://redex.org/> | Public network | Network of local public agents for rural development | Participation in stakeholder meetings and seminars |
| Nacional Parador Hotels <https://www.parador.es/es> | Public company | National Public company exploiting HCMEs as hotels | Participation in study visits, seminar and identification of Best Practices |
| Regional Hospederias (Extremadura) <https://www.hospederiasdeextremadura.es/es> | Public company | Regional Public company exploiting HCMEs as hotels | Participation in study visits, seminar and identification of Best Practices |
| Cluster Turismo de Extremadura <http://clusterturismoextremadura.es/socios> | Private association | Private association of tourism companies | Participation in stakeholders’ meetings and seminars |

# ACTIVITIES FOR IMPLEMENTATION.

**6.1 Main problems/challenges** identified for the protection and promotion of HCMEs in Extremadura during Phase 1:

1. Lack of completed inventories that include private HCMEs
2. Lack of a harmonized and specific programs for Taxation and subsidies focused on HCMEs.
3. Low number of opportunities and programs for heritage exploitation projects.
4. Scarce or no future foreseeable public funding for restoration.
5. Lack of an exploitation strategy for a good part of the restored HCMEs.
6. Scarce public-private partnership experience with regard to HCMEs management and exploitation
7. Difficulties from most of castle proprietors to afford restoration and maintenance.
8. A lack of general awareness of the problem.
9. A lack of communication structures or tools to allow efficient collaboration between different competent administrative bodies and with private agents.
10. Poor marketing and valorisation of heritage resources.
11. Low participatory processes in initiatives promoted from the administration with regard to HCMEs

**6.2 Objectives of the LAP**:

* Main Objective: Modification of existing regional heritage policies for a more efficient protection and promotion of the Regional Heritage.
* Secondary objectives:

1. Promotion and elaboration of a **stable coordination and management structure** (Committee) including regional, provincial and municipal representatives to ensure continuous technical support and coordination with regard to programs or actions related with heritage management and promotion. This structure will promote and revise programs, initiatives and strategies directed towards HCME´s exploitation and promotion. The Committee will ensure a more efficient communication and coordination among the different administration bodies with competences in Heritage management in the Region of Extremadura.
2. Elaboration and promotion of a **Regional Inventory including private HCMEs** as basis for the promotion and implementation of programs and actions.
3. Initiation of a **tax harmonization** process at regional and local level in order to agree on a common tax framework. This framework is intended to solve the current lack of alignment on heritage assets definition, detected among national, regional and municipal regulations.
4. **Use and promotion of new technologies** for the creation of digital resources and for the touristic promotion of heritage through participation.

**6.3 Summary of proposed activities for implementation:**

Taking into account identified challenges, lessons learned from the interregional exchange experiences process during the first phase of the Innocastle project, interviews with local stakeholders and the baseline survey, specific actions have been designed in order to promote an improvement in the use of ERDF funds for the promotion of our cultural heritage (ERDF OP Extremadura). These actions are:

1. Creation and promotion of a **Technical Coordination Committee** with representatives from the different competent public bodies as advisory body for Regional-Heritage management and promotion.
2. Initiation and promotion of a **comprehensive Regional Heritage Inventory including private Assets**
3. Promotion of a **harmonized framework for heritage tax treatment** at regional level and proposal for improvement at national level
4. Promotion of **new technologies for the creation of digital resources** and for the touristic promotion of heritage through **participation**.

**Summary Table**

| Objective | Proposed action in the LAP | Addressed challenges | Main result | Main Lesson learned during the Innocastle project that has inspired this action |
| --- | --- | --- | --- | --- |
| Promotion and elaboration of a stable coordination and management structure (Committee) including regional, provincial and municipal representatives to ensure continuous technical support and coordination with regard to programs or actions related to heritage management and promotion. | Creation and promotion of a Technical Coordination Committee with representatives from the different competent public bodies as advisory body for Regional-Heritage management and promotion. | * A lack of general public awareness of the current situation of HCMEs * Lack of an exploitation strategy for a good part of the restored HCMEs * Lack of programs for heritage exploitation projects * A lack of communication structures or tools to allow collaboration among different administrative bodies and with the private agents | Create a Technical Committee for Regional Heritage management and promotion  **Deliverables:**   * Database of Regional and Local policy makers involved in heritage management. * Action plan (road map) as a management tool for the Committee * Agreements on the operational procedures to provide technical advice to policy makers * 1st Annual report on activities carried out by the Committee. | References in section 7 |
| Elaboration and promotion of a Regional Heritage Inventory including private HCMEs as basis for the promotion and implementation of programs and actions. | Promotion and implementation of a comprehensive Regional Heritage Inventory including private assets | * Absence of a comprehensive inventory for HCMEs, especially private HCMEs. * Scarce public-private partnership experience and framework. | Creation of an independent advisory body composed by heritage experts to support the development of a private heritage inventory  **Deliverables:**   * Roadmap to elaborate the inventory (steps, formats, GIS link, ICT tools, etc.) * Elaboration of the database for the inventory (spreadsheet file) * Preliminary Inventory funded by Regional Government. (final format with interactive map) | References in section 7 |
| Initiate a tax harmonization process at regional and local level in order to agree on a tax framework able to clarify the current lack of alignment on heritage assets definition and categorization, identified among national, regional and municipal legislations. | Promotion of a harmonized framework for heritage tax treatment at regional level and proposal for improvement at national level | * A lack of public awareness of the current situation of HCMEs * Not specific programs for Taxation and subsidies focused on HCMEs * Scarce public-private partnership experience and framework. | Creation of a working group of public staff and experts having responsibilities on heritage tax management  **Deliverables:**   * Compilation and analysis of Heritage tax regulations affecting the Regional Assets * Report indicating the proposed improvements on how to harmonize heritage tax regulations. | References in section 7 |
| Make available to the public, (mainly through schools, programs at local level, Municipalities …) ICT tools that facilitate the digitization of heritage, so that digital content is created by citizens and collected in a e-platform for the tourist promotion of the cultural heritage. The multimedia content generated can be used by the administrations with competence in heritage and tourism for its promotion. IP issues will be considered. | Promotion of new technologies for the creation of digital resources and for the touristic promotion of heritage through participation | * A lack of general public awareness of the current situation of HCMEs * Poor marketing and valorisation of heritage resources * A lack of communication structures or tools to allow public participation for the promotion of the heritage. * Limited availability of new promotional resources for administrations | Creation of a repository of digital tools (paid by the Diputación de Badajoz) available to schools, secondary schools and municipalities that can be distributed among students and citizens in the framework of specific programs and initiatives for the creation of digital resources for the local heritage.  These resources will be uploaded in a platform managed by the Diputación de Badajoz to be used by local, provincial and regional administrations involved in touristic promotion and heritage conservation.  **Deliverables:**   * Repository of available ICT tools for downloading and use * Database of entities with rights for the use of such tools * Platform for the compilation of digital material * Repository of digital resources open to public authorities | References in section 7 |

# ACTIONS:

All actions will be further developed upon approval of this LAP

**ACTION 1- Creation of a Technical Coordination Committee for Regional Heritage management and promotion.**

1. **The background/ lessons learned from the interregional exchange process:**

The objective of this action is to create a coordination and management structure (Committee) including regional, provincial and municipal representatives to ensure continuous technical support and coordination with regard to programs or actions related to heritage management and promotion.

The Action 1 is justified by the lack of a technical working group and of efficient communication structures within the regional and provincial administrations.

The challenges addressed by this action are:

* A lack of communication structures or tools to allow collaboration among different administrative bodies and with the private agents
* Low number of public programs for heritage exploitation projects.
* Lack of an exploitation strategy for a good part of the restored HCMEs.
* A lack of general public awareness of the problem.
* Poor marketing and valorisation of heritage resources.

Action 1 has been inspired by the following lessons learned during the phase 1 of Innocastle

|  |  |  |
| --- | --- | --- |
| **Source of the lessons learned** | **Country** | **Lessons learned** |
| **Study visit and seminar in the UK** | UK | <https://www.theheritagealliance.org.uk/>  Is the England’s biggest coalition of heritage interests that bring together independent heritage organisations from the National Trust, English Heritage, Canal & River Trust and Historic Houses, to more specialist bodies representing visitors, owners, volunteers, professional practitioners, funders and educationalists under a **framework of collaboration and continuous communication** |
| **Study visit and seminar in the UK** | UK | Topophilia - a collaboration between heritage and health sectors. Interesting **structural collaboration between the health and the cultural sector** through innovative policies. |
| **Study visits and seminar in the NL** | BE | The project 'open ruimte platform' joined **several governmental sectors to jointly invest** through project calls in the rural areas of Flanders. The idea is that each partner puts aside a certain tiny percentage of their funding budget (as not to interfere to much with the general way of funding) to support projects which answer to the project calls. |

1. **Action** (please list and describe the actions to be implemented):

The objective of this action is to create a Technical Committee having capacity to define a framework able to ensure a continuous and stable technical support to the Public Administrations involved on heritage management and promotion. This Committee will be informed of actions for the promotion of the cultural heritage that involves ERDF funds. Furthermore, the Committee will be involved in defining the new ERDF operational program and of any new call for projects or programs using ERDF funds for Heritage in Extremadura.

Due to the ongoing definition of Next Generation Funds in Spain and Extremadura Region, no official draft document has yet been published concerning the ERDF Operational Programme 2021-2027 for Extremadura. Although there have already been various meetings during phase 1 of the Innocastle project in which the Regional DG Heritage and Diputación have agreed to work together in the definition of the new ERDF programming concerning Heritage policies, the beginning of phase 2 (namely the first semester of 2021) will fully coincide with the drafting of this programme. Therefore, the setting up of the Technical Coordination Committee will have as a first priority to influence this programming document.

In order to ensure maximum stability over time, this Committee will consist of a s working group composed by motivated technical experts aiming to minimize the temporary and non-continuous input of political representatives. This committee will be composed of technical staff from public regional Institutions involved in heritage and ERDF Funds Management.

For the implementation of this Action, the following tasks should be carried out:

* Definition of the objectives of the Committee; and its organizational structure.
* Identification of Regional and Local entities with competence in heritage management.
* Definition of the technical profiles to be filled by Committee candidates (proposal of candidates by each entity)
* Proposal from each competent entity of at least one candidate to be part of the Committee
* Invitation request addressed to the selected candidates to take part of the technical Committee
* Definition of a Management plan and an action plan (road map with specific actions) for the Committee
* Agreements on the operational procedures to provide technical advice to policy makers
* Monitoring of the tasks carried out by the committee and its results
* Proposal of improvements.

1. **Players involved:**

* This task will be coordinated by the Province of Badajoz
* Representatives from the Regional Government involved in heritage management: General Directorates (Heritage, Tourism, Funds.)
* Representatives from the Provincial Governments in the region (Diputación de Badajoz; Diputación de Cáceres)
* Representative of the association of Municipalities in the Region
* Key social stakeholders at regional level (NGOs)

1. **Timeframe**: May 2021- Project completion
2. **Costs (if relevant):** if relevant, they will be covered by local partner
3. **Funding sources** (if relevant): not relevant
4. **Indicators of success:**

Action 1 will be monitored through the accomplishment of the following indicators:

* Members of the Regional Government, the two provinces and the federation of towns represented in the Committee (Yes/No)
* The committee is named in May 2021
* Number of entities represented in the Committee
* Number of meetings
* Number of participants assisting to the meetings
* Signed agreement to create the Technical Commission for heritage
* Number of elaborated reports
* Defined roadmap for the Committee
* Annual Report of the results.
* Proposal of improvements.

**ACTION 2.- Elaboration of a comprehensive Regional Heritage Inventory including private HCMEs**

1. **The background/ lessons learned from the interregional exchange process:**

Action 2 is justified because of the lack of an inventory of private HCMEs, which is important for the elaboration and implementation of strategic programs and actions towards the maintenance, promotion and exploitation of HCMEs. The public HCMEs inventory also need to be updated. A GIS reference and digitalization of key information and the elaboration of a digital map of elements of this inventory and their interaction with the surroundings is an important tool to take decisions and set strategies.

The challenges addressed by this action are:

* A lack of general awareness of the delicate situation of HCMEs and their socioeconomic potential
* Lack of a comprehensive inventory for HCMEs including private elements
* Lack of an exploitation strategy for a good part of the restored HCMEs.
* Scarce public-private partnership experience with regard to HCMEs management and exploitation
* Poor marketing and valorisation of heritage resources.

Action 2 has been inspired by the following lessons learned during the first phase of the project:

|  |  |  |
| --- | --- | --- |
| **Source of the lessons learned** | **Country** | **Lessons learned** |
| **Good Practices: Heritage inventory** | BE (Flanders) | The immovable heritage inventory list, describes and catalogues all known immovable heritage items in Flanders (build, archaeology, landscape and floating) resulting in a representative overview. This inventory is the starting point for further research, forms the basis for future protection of certain items and can be used by everyone needing an overview of the heritage items in a certain area. It is consultable in database format as well as in an online GIS platform.  <https://inventaris.onroerenderfgoed.be/> & <https://geo.onroerenderfgoed.be/#zoom=9&lat=6639473.15&lon=462444.02> |
| **Good Practices: Heritage Landscape** | BE (Flanders) | Heritage landscape' is an instrument to safeguard larger area's, rich of heritage, within urban planning policy. It is not a protection of specific heritage items but a description of and an introduction of urban planning restrictions within a larger area. It is a unique instrument because it is an instrument used by urban planning and not by the heritage sector. It thus creates a link between heritage and urban planning  <https://monitor.onroerenderfgoed.be/16f.html> |
| **Learning Report Romania/**  **Thematic seminar/Elaborate analysis – heritage in general** | BE | Holistic approach made in Romania including qualitative descriptions through inventories. Budget and programs integration |
| **Learning Report Netherland/Stakeholder messages** | RO | We have learnt about the importance of coordinating HCMEs with other sectors such as transport, education, tourism and environment |
| **Webinar Flanders/** **The integration of Landscape in the Flanders Heritage Agency** | BE | Some aspects from the integrated approach and methodology used for landscape inventory could be considered for the Heritage inventory in Extremadura |

1. **Action** (please list and describe the actions to be implemented):

The objective of this action is to create favourable conditions to elaborate a complete Regional Inventory including private HCMEs (i.e. civil urban/rural historic houses/manors/ historic religious buildings/ etc.). This inventory will serve as a tool for further conservation and promotional activities. The inventory will be used in the decision-making process by the Regional and Provincial Government about funding or priorities in the region.

The database for Regional Heritage Inventory including private HCMEs will be the starting point for any private heritage promotion activity included in the ERDF OP 2021-2027 by the Regional DG Heritage, as at this stage there is lack of identification and listing of the private heritage in the region, which makes it difficult to take decisions on the issue. The inventory will serve to design new support and promotion activities within the ERDF OP, and to involve private owners in the policy.

For the implementation of this Action, the following tasks should be carried out:

* Creation of a management committee for the inventory (Province of Badajoz and Regional Government). The competent authority (Regional Heritage Directorate) will be responsible for maintaining and updating the inventory.
* Analysis of existing data and information and gaps
* Definition of the heritage assets to be included in the inventory
* Definition of information sheets for each element (including use)
* Definition of a roadmap to elaborate the inventory (steps, formats, GIS and TIC tools, etc..)
* Contracting of external services for supporting the elaboration of the inventory in a digital interactive format
* Elaboration of a comprehensive database including private heritage elements of interest at Regional level (Spreadsheet file)
* Elaboration of a Preliminary Inventory including the private identified assets (final format with interactive map)
* Dissemination and communication of the new inventory tool
* Fostering the creation of a Regional Association composed by public representatives and private heritage proprietors seeking for public-private partnerships.
* Monitoring of the tasks and its results
* Proposal of improvements.

The inventory and map are a dynamic tool that will be updated as new elements are identified and categorized. This tool is of great interest for the Regional Government (managing ERDF authority) for the implementation of ERDF funds on heritage.

1. **Players involved:**

* The Province of Badajoz will coordinate the elaboration of the inventory and map. The Regional Government of Extremadura will maintain it and coordinate its updating.
* Regional and Local Public Authorities having heritage responsibilities in the identification of heritage assets
* Private heritage owners and users and associations: Association “Friends of Castles; Hispania Nostra and others in the identification of heritage assets
* Heritage experts: University of Extremadura (research group linked to art and heritage); Professional Architect Association of Extremadura; ACRE (Spanish Professional Association of Restorers and Curators); heritage restoration schools for the identification of elements

1. **Timeframe**: May 2021- Project completion
2. **Costs (if relevant):** Costs for the support in the elaboration of the inventory and digital map (external services for a specialized entity): 30,100 €
3. **Funding sources (if relevant):** External costs covered by the province of Badajoz. Other resources (staff from the Province of Badajoz and the DG for heritage promotion of the Regional Government of Extremadura)
4. **Indicators of success**:

Action 2 will be monitored through the accomplishment of the following indicators:

* Committee for the elaboration of the inventory and map named in May 2021
* Analysis of existing information and data and gaps
* External services contracted in July 2021
* Preliminary Inventory including the private identified assets
* Number of private heritage assets included into the preliminary inventory
* Database of private heritage owners upon permission.
* Inventory elaborated in the final format (open for future updates)

**ACTION 3.-** **Design and promotion of a Harmonized Framework for Heritage Tax incentives**

1. The background/ lessons learned from the interregional exchange process/ Associated GP:

Action 3 is justified for the lack of harmonization and specific tax treatment for HCMEs at national and regional levels. Tax systems in Spain are hampering in some cases a sustainable use of castles. Different National, Regional and Local different tax rates applied to HMCE in Spain sometimes reflect incoherence and hider the potential for improvements in the maintenance and sustainable exploitations of HCMEs.

The challenges addressed by this action are:

* A lack of general awareness of the problem of many HCMEs that are in bad condition and at risk to be lost forever
* Lack of specific or harmonized programs for taxation and subsidies focused on HCMEs
* Scarce public-private partnership experience and framework.
* Lack of completed inventories that include private HCMEs
* Low number of opportunities for heritage exploitation projects.
* Scarce or no future foreseeable public funding for restoration.
* Lack of an exploitation strategy for a good part of the restored HCMEs.
* Difficulties from most of castle proprietors to afford restoration and maintenance.

Action 3 has been inspired by the following lessons learned during the experiences exchanged so far:

|  |  |  |
| --- | --- | --- |
| **Source of the lessons learned** | **Country** | **Lessons learned** |
| **Good Practices: Taxation benefits for private owners** | NL | Taxation benefits for owners opening their HCME to the public |
| **Good Practices: Heritage Alliance** | UK/ NL | <https://www.theheritagealliance.org.uk/tax-working-group/>  The Tax Working Group brings together a range of stakeholders and members to explore how the tax system can be reformed to benefit the Heritage Sector. |

1. Action(please list and describe the actions to be implemented):

The objective of this action is to initiate a tax harmonization process at regional and local level in order to agree on a tax framework able to clarify the actual lack of alignment on heritage assets definition and categorization, detected with national, regional and municipal legislations.

Although all relevant taxes will be studied towards a proposal of harmonisation, we have to take into account that some of them are decided at national level, such as Income Tax and VAT. Other very relevant taxes are designed at Regional Level (Inheritance, transmission or estate taxes) or even local level (such as property tax). The later are probably going to be easy to attain changes on from the Innocastle project.

For the implementation of this Action, the following tasks will be carried out:

* Creation of a working group including public staff having responsibilities on heritage tax management from the Regional government, the Province of Badajoz and the Province of Cáceres. This Action will be coordinated with the Regional Tax Authority.
* Compilation and analysis of heritage tax regulations affecting the Regional HCMEs
* Consultation meeting with private and public representatives for HCMEs
* Elaboration of a report with proposed improvements on how to harmonize heritage tax regulations.
* Presentation of a proposal for policy improvements on taxes to Regional and National authorities.
* Monitoring of the tasks and its results
* Proposal of improvements.

1. **Players involved**:

* Regional and Provincial Public Authorities having responsibility for heritage tax management
* Representative of the DG for heritage promotion (public point of view of HCMEs)
* Representative of the Association of Castle (private point of view of HCMEs)
* Independent experts (fiscal and legal experts)

1. **Timeframe**: May 2021- Project completion
2. **Costs (if relevant):** not relevant
3. **Funding sources (if relevant):** Not relevant
4. **Indicators of success:**

Action 3 will be monitored through the accomplishment of the following indicators:

* Working group created in June 2021
* Tax regulations analysed
* Public representatives invited to a consultation meeting
* Private heritage representatives invited to a consultation meeting
* Final report with a proposal of tax harmonization at regional and national level elaborated, validated and sent to authorities.

**ACTION 4.-** **Use of new technologies for the creation of digital resources and for the touristic promotion of heritage through open participation.**

1. **The background/ lessons learned from the interregional exchange process Associated GP:**

Action 4 is justified for the lack of a Regional Heritage promotion through the application of innovative tools and open participation.

The challenges addressed by this action are:

* A lack of general public awareness of the current situation of HCMEs
* Poor marketing and valorisation of heritage resources
* A lack of communication structures or tools to allow participation for the promotion of the heritage.
* Limited availability of new promotional resources for administrations
* Lack of an exploitation strategy for a good part of the restored HCMEs.
* Low local involvement in initiatives promoted from the administration with regard to HCMEs

Action 4 has been inspired by the following lessons learned during the experiences exchanged so far:

|  |  |  |
| --- | --- | --- |
| **Source of the lessons learned** | **Country** | **Lessons learned** |
| **Good Practices:** Cronicari digitali (Digital chroniclers) | RO | An interesting idea that aims to connect the X, Y și Z generation through knowledge transfer and engage young people in promoting the cultural identity through storytelling and social media.  <https://cronicaridigitali.ro/> |
| **Good Practices:** WebKastely | RO | Online contest connecting private owners with the local communities.  <http://webkastely.transindex.ro/?o=miez> |
| **Good Practices:** Summer schools dedicated to heritage conservation | RO | Raining young conservation professionals by actively involving them in restoration works on built heritage.  Built Heritage Conservation Training by Transylvania Trust <http://www.heritagetraining-banffycastle.org>  The Transylvania Trust is a registered charity, set up by conservation professionals and volunteers in 1996. Our principal aim is to conserve and promote Transylvania's rich and diverse built heritage, to encourage society to be receptive towards the built environment. The Trust is active in all fields of conservation: data recording, inventory, survey, building restoration, maintenance, training, and also scientific research.  ARA Summer School / Adoptă o Casă la Roşia Montană - ARA <https://www.adoptaocasa.ro/>  <https://www.adoptaocasa.ro/>  <http://coalitie.castelintransilvania.ro/scoala-de-vara-la-castel-2018-de-pe-domeniul-teleki-gornesti/> |
| **Good Practices:** Visitor management tool - the website used by the National Trust | UK | Visitor Journey Framework tool ET to provide a demo copy  <https://www.nationaltrust.org.uk/> |
| **Learning Report UK/Takeaways** | UK | * National Trust is able to create more opportunities for deeper connection with local people and engaging them in the organization work * Innocastle delegates spent some time considering the social value of heritage as an instrument to create a more equal society and the role of heritage in cultural identity * Discussions about the relations with local authorities * The inter-relation between country states and the wider community * National Trust organises volunteering programmes * Engaging young people to ensure connections with next generations |
| **Learning Report Spain/Marketing and visibility (J.M. López)** | SP | A very interesting and replicable experience where a group of amateur bloggers who hold a common interest and skills in wildlife, photography and cultural heritage come together on a yearly basis to produce a publication covering a chosen theme and presented in a seminar and on their different blogs. The experience consists in a joint effort with a large impact, as these persons are all professionals coming from different areas of knowledge and each provide an important amount of very trusting followers and national and international level. Impact, therefore, is not only broad, but effective. |
| **Good Practices: Visiteering at Croft Castle** | UK | Visitors can volunteer at Croft Castle by cleaning items of the collection together with staff and building new objects. It creates engagement and a unique experience for the visitor, while the castle benefits from some extra hands.  <https://www.nationaltrust.org.uk/features/volunteer-at-croft-castle>  Croft is a place which dates back to the Domesday Book and has many rich and interesting stories and moments of history to uncover. It is not necessary to have historical knowledge of the castle when young get started.  The castle volunteers have freedom to roam inside the castle, sharing stories they love with visitors, showing them parts of the collection, they may not have seen before and helping families to engage with some of the memorabilia, costumes, stories and games we have to share |

1. **Action** (please list and describe the actions to be implemented):

The objective of this action is to make available to the public ICT tools that facilitate the digitization of heritage, so that digital content is created by citizens and collected in a e-platform for the touristic promotion of the cultural heritage. The multimedia content generated can be used by the administrations with competence in heritage and tourism for its promotion.

The culture and heritage digitalization in Extremadura is already included as a priority in the Extremadura Digital Agenda (Agenda Digital de Extremadura), that is a smart, sustainable and inclusive integrated into the RIS3 Regional Strategy that aims to implement a roadmap for the development of ICT in Extremadura, as well as the heritage priority in ERDF OP. The idea of the action in the project is to replicate in both policies the lessons learned with the Innocastle project.

To achieve this objective Diputación de Badajoz will create a repository of open digital tools available to schools, secondary schools and municipalities that can be distributed among students and citizens in the framework of specific programs and initiatives for the creation of digital resources for the local heritage.

These resources will be uploaded in a platform managed by the Diputación de Badajoz to be used by local, provincial and regional administrations involved in touristic promotion and heritage conservation. This kind of activity is potentially interesting for any situation when gathering quality up-to-date data and involving the public is an asset, such as environmental or wildlife monitoring. Therefore, the idea is to boost the visibility of our activity in order to allow for replication.

For the implementation of this Action, the following tasks should be carried out:

* Definition of the objectives of the action and identification of agents (Database of entities with access to the repository and the use and promotion of tools).
* Informative campaign to municipalities and schools (Workshop/meetings)
* Selection of ICT tools (contracting of right for its use if needed), and elaboration of a repository of available ICT tools for downloading and use for identified agents.
* Creation of protocols for the downloading and use of the ICT tools
* Creation of a platform for the automatic uploading and compilation of digital resources
* Protocols for the use of the platform
* Repository of digital material open to public authorities
* Monitoring of the tasks and its results
* Proposal of improvements.

1. **Players involved:**

* Diputación de Badajoz coordinates this initiative
* Other Regional and Local Public Authorities having responsibilities on heritage promotion (Regional government and Municipalities)
* Schools and local associations

1. **Timeframe**: May 2021- Project completion
2. **Costs (if relevant):** The cost for the elaboration of repositories and e-platform (30,100.000 euro).
3. **Funding sources (if relevant):** Diputación de Badajoz
4. **Indicators of success:**

Action 4 will be monitored through the accomplishment of the following indicators:

* Database of entities with access to the repository and the use and promotion of tools
* Repository of available ICT tools.
* Platform with a repository of digital material open to public authorities
* Schools and secondary schools involved in the initiative
* Municipalities involved in the initiative
* Pictures and videos uploaded in the e-platform

|  |  |  |
| --- | --- | --- |
| Proposed action in the LAP | Policy instrument | Impact on the Policy instrument |
| Creation of a Technical Coordination Committee for Regional-Heritage management and promotion. | ERDF OP EXTREMADURA | The Committee will advise on the actions to be implemented for the promotion and exploitation of HCMEs in Extremadura using ERDF funds. The DG for Heritage Promotion of the Regional Government will announce in advance proposed actions or programs involving ERDF funds not to this Committee. The Committee can advise on improvements and changes.  Therefor every action using ERDF funds will be reviewed by an external technical committee to ensure adequacy and cooperation among administrations. |
| I Elaboration of a comprehensive Regional Heritage Inventory including private assets | ERDF OP EXTREMADURA | This inventory will allow the correct elaboration of programs and future policies towards the promotion and exploitation of HCMEs in the region. The inventory will serve as a database to be taken into account for subsidies or programs using ERDF funds. |
| Design and promotion of a Harmonized Framework for Heritage Tax Treatment at regional level and proposal for improvement at national level | ERDF OP EXTREMADURA | The harmonization of taxes and programs for HCMEs will facilitate the implementation of new programs using ERDF funds in the Region |
| Use of new technologies for the creation of digital resources and for the touristic promotion of heritage through open participation. | ERDF OP EXTREMADURA | This initiative will serve as a demonstrative experience in the involvement of the local community in programs and initiatives for the promotion of the cultural heritage using ERDF funds. The use of ICT open tools is an important resource that should be considered when designing programs. The digital material in this initiative is created by the local community and the people will see how their heritage resources are promoted with their pictures and videos, reinforcing the link between the citizens and the heritage elements. The results of the activity carried out by the Diputación de Badajoz in the province of Badajoz during phase 2 will hopefully inspire the inclusion of the use of similar tools by the DG Heritage (managing Authority) within their heritage management policies at regional level, and could eventually be proposed for funding under the SF OP draft version issued in the first months of 2021. The Regional DG Heritage has already expressed their interest in up-scaling this action and has committed to follow the results in meetings held in February 2021. |

# MONITORING OF THE ACTION PLAN

## Monitoring Structure:

A **Monitoring Committee** will be set up at the beginning of the implementation phase of the Local Action Plan. This Monitoring Committee will include at least one representative of the following entities:

1. Province of Badajoz (Coordinator of the LAP)
2. Regional Government of Extremadura (DG for Heritage Promotion)
3. Regional Government of Extremadura (DG for Finance)

The Monitoring Committee will meet every three months to evaluate the progress of the activities. Decisions that might affect the correct implementation of the Local Action Plan will be evaluated and approved by this Committee. Each of the entities have the right to one vote and in case of a tie, the Project Coordinator has the right to decide.

**LAP Coordination team**: The Technical LAP Coordinator will be named by the Province of Badajoz and will be supported in the monitoring process by a technical representative of the DG for Heritage Promotion. Their task is to ensure the correct implementation of the LAP.

**Activity Leaders:** one Activity leader (AL) will be named to be responsible for each specific activity. This AL will also keep the LAP coordination team informed of the evolution in the design and implementation of each activity and will report to them with the results.

## Monitoring process and assessment plan

The monitoring and assessment of the LAP will be based on two pillars

1. The monitoring and assessment of **specific LAP Activities**
2. The monitoring and review of the selected policy **instrument** and other **policies and programs** that include references to the Innocastle project or this LAP.

1. The monitoring and assessment of specific activities will be coordinated by the coordination team. It will hold regular direct meetings (virtual or face to face) with the Activity Leaders to check the implementation of Activities. The results of the activities will be included in an annual report for the implementation of the LAP

2. The monitoring and review of policies and programs that include references to the Innocastle project or the actions of this LAP, consists of an annual benchmarking study of main policies and programs connected with heritage in the region of Extremadura.

## Performance Indicators per Activity/Action

Indicators for ACTION 1- Creation of a Technical Coordination Committee for Regional heritage management and promotion.

* Members of the Regional Government, the two provinces and the federation of towns represented in the Committee (Yes/No)
* The committee is named in May 2021
* Number of entities represented in the Committee
* Number of meetings
* Number of participants assisting to the meetings
* Signed agreement to create the Technical Commission for heritage
* Number of elaborated reports
* Defined roadmap for the Committee
* Annual report of the results.
* Proposal of improvements.

Indicators for ACTION 2.- Elaboration of a Comprehensive Regional Heritage Inventory including private HCMEs

* Committee for the elaboration of the inventory and map named in May 2021
* Analysis of existing information and data
* External services contracted in July 2021
* Preliminary Inventory including the private identified assets
* Number of Private Heritage Assets included into the preliminary inventory
* Database of private heritage proprietors
* Inventory elaborated in the final format (open for future updates)

Indicators for ACTION 3.- Design of a Harmonized Framework for Heritage Tax Treatment

* Working group created in June 2021
* Number of tax regulations analysed
* Number of public representatives invited to a consultation meeting
* Number of private heritage representatives invited to a consultation meeting
* Final report with a proposal of tax harmonization at regional and national level elaborated and sent to authorities.

Indicators for ACTION 4.- Use of new technologies for the creation of digital resources and for the touristic promotion of heritage through open participation.

* Database of entities with access to the repository and the use and promotion of tools
* Repository of available ICT tools.
* Platform with a repository of digital material open to public authorities
* Nº of schools and secondary schools involved in the initiative
* Nº of Municipalities involved in the initiative
* Nº of pictures and videos uploaded in the e-platform

## Contingency measures and COVID-19

A plan will be carried out to identify and control the possible risks that can lead to a poor LAP performance upon the approval of this LAP. This plan will involve the following measures:

• Initial identification of potential risks for the correct implementation of the Plan

• Initial identification of contingency measures and protocols for their execution

• Periodic meeting for risk assessment and redefinition of potential risks and contingency measures (quarterly)

In march 2021, the main responsible for the implementation of the plan (LAP coordination team: a coordinator from the Province of Badajoz and a representative of the DG for Heritage of the Regional Government), will maintain a meeting to identify and evaluate the potential risks and to develop possible contingency measures. The Plan and the associated risks will be reviewed through quarterly monitoring meetings.

**Planned revision Dates:**

* June 2021
* Sept 2021
* Dec 2021
* March 2022
* June 2022
* Sept 2022

**Protocol:**

• Risks and contingency measures will be presented in a matrix that will be updated at each risk assessment meeting. These meetings will assess the identified risks and identify new potential risks for the next monitoring phase with their respective contingency measures.

• In the event that any of the risks identified (or others) occurs during the project, the LAP coordination team will organize a meeting to put in place contingency measures. Representatives of all entities involved in the action in which the risk is occurring will be attended by this meeting.

Initial Matrix for Risks (to be reviewed and completed):

| **Risks** | **Contingency measure** | **Likelihood** | **Impact** |
| --- | --- | --- | --- |
| Lack of resources for the implementation of any Action/ Funding is withdrawn or is insufficient | The actions to be implemented in the LAP have been included in the budget of the Province of Badajoz for 2021 and 2022. This entity is economically solvent and do not foresee any problem. However, the Regional Government is also involved in the LAP and can collaborate with own resources if needed. | LOW | HIGH |
| Entities participating in the implementation of any action decide to withdraw from the LAP | This LAP has involved all entities and stakeholders connected with the planned actions during its design. The continuous monitoring and involving of entities and stakeholders is crucial for avoiding this kind of situation. A commitment letter will be signed with the Regional government to ensure their participation until the finalization of the LAP implementation | LOW | HIGH |
| Delay in the implementation of any Action of the LAP | A continuous monitoring of all actions and regular meetings will reduce this risk. However, in the case of a delay, a report justifying the delay including a new real calendar for the action will be elaborated by the responsible of the action. Actions will be designed and implemented taking COVID and non-COVID scenarios in parallel so that restrictions will not affect the implementation of actions, only the format of specific events. | HIGH | MEDIUM |
| Data is lost after collection | Different measures should be taken into account:   * Ensure effective back-up procedures to record data as it is collected. * Collect data contemporaneously using two different methods, e.g. paper and recording. * Potentially, review collecting the data again. * Establish the significance of the loss to the overall project. | LOW | HIGH |
| Poor quality data is obtained | In this case the responsible for the action will use alternative methods to obtain reliable qualitative data such as phone or face to face interviews with key actors | LOW | HIGH |
| Stakeholders are uncooperative, or even hostile | The LAP has involved key stakeholders from the very beginning of the Share Project. All actions have been discussed and validated by main key actors and stakeholders and the atmosphere of cooperation is very good. The main responsible for the LAP, the Provincial and Regional Government are both the main direct stakeholders | LOW | HIGH |
| Personal safety or health issues of members of the team | Personal safety and health issues will be taken into account in the implementation of all LAP actions. A responsible for health and safety will be named by the Province of Badajoz during the implementation of the LAP to ensure all safety and health regulations and measures are respected. Paying special attention to COVID-19 related regulations. | LOW | HIGH |

# CALENDAR FOR PLANNED ACTIVITIES AND RESOURCES.

|  |  | **2021** | | | | | | | | | | | | **2022** | | | | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ACTIVITY | EXPECTED BUDGET | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC |
| ACTION 1- Creation of a Technical Coordination Committee | 0 € |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| ACTION 2.- Comprehensive Regional Heritage Inventory including private HCMEs | 30,100 € |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| ACTION 3.- Harmonized Fiscal Framework | 0 € |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| ACTION 4.- Use of new technologies for heritage promotion through open participation | 30,100 € |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

# PILOT ACTION

A pilot action is dedicated to designing and testing a new protocol for the implementation of socioeconomic cost-benefit analysis for important investments in heritage promotion, restoration or exploitation when using ERDF funds in Extremadura.

The pilot was submitted on December 02, 2021 to the programme by Diputación de Badajoz and approved March 03, 2021, according to the following clues:

|  |  |
| --- | --- |
| Project Acronym: | Innocastle |
| Project Index (PGI): | PGI05215 |
| Title of the pilot action | Establishing a new protocol for financing heritage from structural funds to ensure long term sustainability. |
| Policy instrument(s) addressed: | The Extremadura Operational Programme - 2021-2027 |
| Partner(s) concerned: | Diputacion de Badajoz (DB) |
| Country (countries): | ES |

Luna Castle is a beautiful medieval castle in the centre of Alburquerque, situated on top of a hill at the border with Portugal, as it is part of an extensive defence line characterizing castles in the region. Moreover, it is situated within the “Dehesa” landscape, providing rich wildlife and a stunning landscape. After being restored through European funds in the previous programming period, this castle later received an investment of 8 million euro and it was going to be transformed into a publicly run hotel. However, due to the financial crisis, administrative and political issues, the hotel could never be open for the public and the castle is currently being underused. Furthermore, the Castle is not open to the public regularly, and only intermittent visits can be implemented thanks to the work of a volunteer guide to whom the Municipality has granted access.

The site is in urgent need of an efficient exploitation plan and an inclusive partnership between the public, private and community actors to ensure the good administration and exploitation of the site. Albuquerque is a particular case in which the castle property, its exploitation and its maintenance depends on different administrations (Municipality, Region and Ministry) and in which, in addition, the Badajoz Province has competences in the promotion of the heritage. This affect the efficient use and exploitation of the Castle because there are not clear protocols and cooperation structures for its management. This pilot will detect the problems and will set solutions for this situation, involving all stakeholders and giving them the opportunity to understand the socioeconomic benefit that investments in heritage can have at local level

The objective of the pilot is to design and validate by means of a concrete pilot activity a protocol for the sustainable investments in castles (and HCMEs) using structural funds in the province of Badajoz (in the short term) and in the Region of Extremadura in a longer term.

**Planned activities to be implemented**:

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| **PHASE 2** |
| **Semester 1** |
| 1. **Elaboration of a coordination and monitory plan for the pilot action. Contracting of external expert.**   The objective of this activity is to set a coordination team and to detail all steps to be carried out during the pilot action, including timetable, responsible for each action and expected results. A handbook containing all this information will be developed and a contingency plan for the implementation of the pilot will be included. The selection and contracting of an external expert for the elaboration of a protocol including a social cost benefit analysis and the participatory process will be also carried out in this activity. The external expert will be in charge of   * developing a first draft of the protocol including steps for a social cost-benefit analysis as basis for the debate of the participatory process * Designing and coordinating the implementation of the participatory process * Monitoring of the common agenda and elaboration of a social cost/benefit analysis of implemented actions  1. **Definition of stakeholders and design of the Participatory process**   In this activity a data base of all stakeholders (public and private) including their contacts will be created (Personal data protection regulations will be guaranteed)   1. **Design of the participatory process**   The objective is to create a protocol for the implementation of a **social cost / benefit analysis** though a participatory process with stakeholders. The participatory process will be detailed (objectives, steps, meetings, roundtables, locations, expected outcomes, …) in this semester, and afterwards implemented respecting the foreseen planning (in semester 2 and 3). A first draft of the Protocol will be produced in semester 1 by the external expert prior to the start of the participatory process. A local dissemination campaign will be carried out using the Province and the municipality of Albuquerque social pages to gain the attention of potential stakeholders prior to the implementation of the process. Different meetings (at least 2) will be carried out in this semester for the elaboration of the management plan and common agenda for semester 2 and 3.  At least 4 round tables with stakeholders will be implemented for the design and validation of the protocol in semester 2 and 3.   1. **Elaboration of a Management plan and common agenda for 1 year for the Luna Castle**   In parallel to activity 3 a common agenda will be designed and validated for the regular opening and use of the Castle during one year. Local associations will be encouraged to propose activities to be implemented in the castle and its surroundings for semester 2 and 3. Authorities will grant access and facilitate the correct development of these actions (extra resources, if needed, will be responsibility of the association in charge of the activity). |
| **Main outputs** |
| * First draft of the protocol * SWOT analysis of the initial situation * Report of the participatory process * Common agenda |
| **Semester 2** |
| 1. **Implementation of the participatory process with stakeholders**   The first draft of the Protocol produced in semester 1 by the external expert will serve as basis for the debate of a participatory process in this semester. This process, detailed in semester 1 by the external expert, will include at least 3 round tables with stakeholders for the identification of needs and potential solutions and the design of the protocol. The idea is to held the tables physically but if the scenario is not safe due to COVID-19 restrictions, they will be carried our virtually using a online meeting platform.   1. **Analysis or results of the participatory process and elaboration of a preliminary document for the protocol**   Once the process has been carried out, conclusions will be drafted and a complete draft of the protocol taking into consideration such results, will be developed by the external expert   1. **Monitoring of the Management plan and common agenda for 1 year for the Luna Castle**   The common agenda designed in semester 1 will be monitored and a brief report for the results achieved in this semester developed, as well as next steps and potential risks, contingency measures and improvements for semester 3 |
| **Main outputs** |
| * Final document with conclusions and proposals after the participatory process * Preliminary protocol * Monitoring report of the common agenda for semester 2. |
| **Semester 3** |
| 1. **Elaboration of a final document and validation with stakeholders**   Once the preliminary document has been defined after the participatory process, a final table with stakeholders will be implemented for its validation in order to have a final validated document   1. **Monitoring common agenda for 1 year for the Luna Castle and cost-benefit analysis**   The common agenda designed in semester 1 will be monitored and a brief report for the results achieved in semester 2 and 3 developed. A report of the socioeconomic impact of the actions and visits implemented during semester 2 and 3 will be carried out by the external expert with the help of the Province of Badajoz and the municipality of Alburquerque. This will help us to determine the social cost/benefit analysis of the common agenda and management plan of the Castle this year.   1. **Approval of the protocol in the Province of Badajoz**   The Province of Badajoz will bring the validated protocol to their Government board in which the different provincial deputies for heritage, tourism, economy (and other related areas) will approve it officially in order to be set in programs and tenders where large investments in heritage are included.  The Region of Extremadura, after the pilot experience in Alburquerque, will sign a letter of intent to present the protocol for approval with the DG for heritage promotion, DG for tourism, DG for EU funds, DG for Development (and other related DGs). The protocol would be used in programs and tenders where large investments in heritage are included. |
| **Main outputs** |
| * Final protocol validated * Cost benefit analysis of the activities for 1 year implemented * Letter of intent signed by the Region * Protocol approved by the Province |
| **Semester 4** |
| *No content related activities should take place in this semester. The last months of the project should be entirely dedicated to the project closure.* |

**Budget:**

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| --- | --- | --- | --- | --- | --- | --- |
| **Partner** | **Staff costs** | **Office and administration** | **Travel**  **and accommodation** | **External expertise and services** | **Equipment** | **Total partner budget** |
| **Province of Badajoz** | 19,000.00 € | 2,850.00 € | 1,200.00 € | 37,000.00 € | 0€ | 60,050.00 € |
| **Total** | 19,000.00 € | 2,850.00 € | 1,200.00 € | 37,000.00 € | 0€ | 60,050.00 € |

# Signature

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name and position: \_\_\_\_\_\_\_\_\_\_\_\_

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stamp of the organisation

1. http://turismo.badajoz.es/es/ruta/mudejar [↑](#footnote-ref-2)
2. https://www.turismoextremadura.com/en/explora/Ruta-Via-de-la-Plata/ [↑](#footnote-ref-3)
3. https://www.xn--castillosdeespaa-lub.es/es [↑](#footnote-ref-4)