ST21
**EUROPEAN
CULTURAL HERITAGE
STRATEGY
FOR THE 21ST CENTURY**

HOLISTIC EVALUATION

in less than 1000 words...

Time TO EVALUATE

The concept of cultural heritage has significantly changed in recent decades. The customary divisions are disappearing and giving way to a holistic approach. Heritage policy requires an interdisciplinary approach that seeks to create synergy between policies (**The European Cultural Heritage Strategy for the 21st century**).

Before proceeding we recommend reading the **Evaluation Basics Factsheet**

The new approaches of the strategy

The new intervention logic integrates vertical and horizontal heritage policy actions, facilitating synergies between the main heritage domains. This new intervention logic is holistic, since it:

- considers all levels of heritage from local to international (vertical logic)
- is interdisciplinary and multi-sectoral, consisting of three main heritage policy domains, called components in the Strategy (horizontal logic):
  - the "social" (S),
  - the "territorial and economic development" (D)
  - the "knowledge and education" (K).

Traditionally, these three components are approached independently, but their side effects often affect one another. The new intervention logic demands consideration of the side effects during the preparation, implementation and evaluation of policy actions' impacts on cultural heritage.

If all heritage policy goals are fully achieved only separately without relying on one another, the overall structural or systemic change may not materialise on a social-wide level, despite considerable efforts and funds invested. Nowadays, success depends not only on the effectiveness of policy actions, but also on their synergies.

Horizontal links between the three heritage components can be described with a matrix of relations. The matrix consists of cross-sections, where the rows of the matrix represent the policy actions (as inputs), and the columns of the matrix represent the policy goals. The intersection of a column and a row in this matrix, represents the impacts of actions on the goals. The matrix is important since it enables **evaluation of synergies** of impacts between cultural heritage policy actions.

How to evaluate synergetic heritage policy impacts

The **Strategy's matrix of relations** (see **Annex 2 of Strategy 21**) consists of two main elements:

- **Recommendations** (R) relating to heritage priority measures or actions (in rows of the matrix)
- **Challenges** (C) relating to priority goals or heritage policy impacts (in columns).

R and C are further broken down into three main **heritage components** (S, D, K). From this composition, we obtain the matrix of relations with three rows and three columns.

Holistic evaluation upgrades the standard approach when evaluating by means of the matrix of relations. Technical procedure is illustrated further in the paper **Smart Heritage Policy**.

The defining features of the Strategy are the areas of convergence **or synergy** between heritage components, which indicates the consistency of the Strategy. Areas of convergence are evaluated as horizontal overlaps or **interface** (as it is called in S21) that comprise indirect or side effects of policy actions on not primarily targeted areas of impact.

- The horizontal interface **between S and D**. It covers the intersection between fostering democracy, participation, empowerment of heritage communities and enhancement of the economic heritage-related opportunities. S and D also overlap in the innovative economic and

COUNCIL OF EUROPE

ST21

CONSEIL DE L'EUROPE

financial models tailored for heritage potential and meeting local needs and expectations.

- The horizontal interface **between D and K** accounts for the maintenance and transmission of heritage knowledge, methods, and skills in order to further develop these topics. The bridges between the two are new heritage products and services, the combination of traditional and modern skills, and above all new IT tools that connect users to heritage.
- The horizontal interface **between S and K** accounts for sharing practices, for promotional and advocacy actions, and for normative considerations of heritage policy. It is driven by education and awareness-raising about heritage rights and responsibilities of stakeholders and about heritage values for the young generation.
- Lastly, the horizontal interface **between K, D, and S** represents the full implementation of a cross-sectoral and multifunctional concept of heritage that contributes to the strengthening of European values and identity.

Criteria for holistic evaluation

1. **Effectiveness**. How much is an action directly (immediately) effective for the achievement of specific S, D, or K related strategic goals? This aspect is accomplished with a standard approach to evaluation.

Synergies are evaluated with three criteria: Is an action indirectly effective? How do heritage-oriented actions affect one another horizontally with side effects? Each action can be positively synergetic (win-win), negatively synergetic (win-lose), or absent (no synergy is achieved).

2. **Strong balance** between heritage policy impacts on the three heritage components. This explains if heritage policy actions are equally achieving most outstanding challenges.

3. **Cohesion** measures strength of convergence between two heritage components. It explains how their corresponding actions impact one another in a positive or negative way.

4. W**eak balance** shows if cohesion is symmetrical, with mutually supporting 'win-win' achievements, or asymmetrical, with 'win-lose' achievements.

A heritage policy is **holistic** when all three components, S, D, and K are progressing equally towards their specific goals, strongly supporting one another's efforts. An evaluated heritage action is holistic, if it is highly effective in achieving all specific goals (assessing Effectiveness and Strong Balance) and at the same time produces strong positive and mutual synergies between S, K, and D (assessing Cohesion and Mutuality).

Non-heritage policy measures can evaluate the impact in basically the same matrical way when achieving heritage strategy goals, mainly in education, employment, tourism, and sustainable development, and vice versa.

Author: Bojan Radej

www.coe.int/strategy21

Strategy21@coe.int