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## Outstanding heritage sites - A resource for territories

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# OUTSTANDING HERITAGE SITES

A resource for territories

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# **OUTSTANDING HERITAGE SITES: A resource for territories**

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# TABLE OF CONTENTS

<b>Introduction</b>	9
Revealing the forces in tension to better map out paths towards balance	
The value of landscapes and heritage	
The (financial) management of the sites at the heart of balancing issues	
The concept of resource at the centre of analyses	
A mixed methodology	
<b>Part 1: Outstanding heritage sites and territories: an exchange of best practices</b>	19
Introduction	21
<b>Chapter 1: Territorialisation of outstanding heritage sites</b>	23
70 UNESCO sites and/or sites that have been awarded the label “Grands Sites de France” are considered to be outstanding heritage sites	25
Heritage, a property and a resource	32
Outstanding heritage sites as a territorial resource	32
Outstanding heritage sites as a heritage resource	33
Outstanding heritage sites, places for managing collective or common public properties?	36
Territorial diversity through the prism of typologies	42
The socio-economic typology	44
The fiscal-financial typology	50
The environmental typology	57
The territorial trajectories	66

<b>Chapter 2: The socio-economic and fiscal-financial impact of the sites in their territory</b>	79
The impact of outstanding heritage sites on local socio-economic dynamics	81
A territorial resource among others	84
A resource needing activation	93
A possible territorial development lever	95
The fiscal and financial situation of the local authorities concerned by outstanding sites	100
Unequal local authorities in terms of wealth depending on the sites	101
A high variability in expenditures of local authorities	112
A more or less pronounced local indebtedness	116
Contrasting “models” marked by inertia	119
 <b>Part 2: Outstanding heritage sites and territories: meeting the challenge of a peaceful relationship</b>	 135
Introduction	137
 <b>Chapter 1: Governance and management of outstanding heritage sites</b>	 139
The governance of outstanding heritage sites	141
“Multiterritorial” areas	142
Managing the stakeholders in the absence of a single political authority	149
Questioning the economic and legal model of territorial management	157
New and common fiscal and financial management methods	165
A financial management that is also fragmented	167
Means activated to deal with “outstanding” situations	174
Inter-thematic tensions in terms of financial dimensions	181
Approaches to addressing resource constraints	187
 <b>Chapter 2: Activation and appropriation of an economic, landscape and cultural resource</b>	 197
(Re)activating heritage sites as an economic resource	200
Sharing economic benefits	201
A development hampered by preservation measures	208
Innovations within and with territories	213
The environmental and landscape dimension as federative	219
The identity landscape as the linchpin of attractiveness	220
Standard tensions of land planning / development	228
Original strategies for overcoming the levels of tension	232

Heritage fates and a sociocultural appropriation	238
Multiple and complex heritage processes (French: patrimonialisation)	238
A dual alterity driving force	243
Multiple paths to balance	254
<b>General conclusion</b>	263
The three structuring problematic dimensions	266
Conciliation between short term and long term	266
Integration attempts faced with fragmentation	267
Category-based logic, undermining associations	268
Strong dependencies weighing on the emergence of new practices	269
Cumbersome rationales for action	270
The inertia of financial situations	270
The tangle of standards	272
The emergence of new, innovative and experimental solutions	273
Capitalising on the existing	274
Conciliating the players and temporalities	276
Open experimentation environments	278
<b>List of illustrations</b>	283
<b>Bibliography</b>	287
<b>Appendix: The research areas</b>	301
- Somme Bay	303
- Nord-Pas-de-Calais Mining Basin	304
- Canal du Midi	305
- Decorated Cave of Pont d'Arc (known as Grotte Chauvet-Pont d'Arc) and Gorges of Ardèche	306
- The rebuilt city of Le Havre	307
- Poitevin marshland	308
- Massif des Ogres	309
- La Chaux-de-Fonds / Le Locle	310
- Emscher Park	311
- South Piedmont	312
- Salt valley of Añana	313
- Megalithic temples of Malta	314
<b>Presentation of the authors</b>	315





In August 2014, the Urban Planning Construction Architecture Plan (PUCA) launched a research consultation entitled “Outstanding sites: what contribution do they make to local development? ”. Outstanding sites were taken to mean UNESCO world heritage sites (39) and major natural sites in France, or sites recognised under the French network for major sites (Réseau des Grands Sites de France, RGSF) (41)<sup>1</sup>. The consultation highlighted central issues in terms of development and funding of the local (public) action for territories hosting a remarkable heritage site, where the problems have particular significance and connotations with respect to the stakes at play.

This publication is the result of a research programme conducted by teams from the PACTE and Lab’Urba laboratories, associated with the consulting cooperative Acadie-Reflex, under the scientific direction of Magali Talandier and Françoise Navarre<sup>2</sup>. The authors would like to thank Raphaël Besson, Manon Loisel, Philippe Estèbe and Gilles Novarina, Inès Ramirès-Cobo and Marine Roville for their involvement in this study, as well as Martine Vernhes for the coordination of the consultation under the PUCA. Finally, the authors convey their thanks to all the persons met during the field studies in France and Europe, as well as the members of the project’s scientific committee.

<sup>1</sup> That is, 70 sites in metropolitan France, a few of which are both recorded on the UNESCO world heritage list and recognised under the RGSF, without the (management) areas being completely identical, namely: all or part of the Vézère Valley, the site of Rocamadour, the Tarn Gorges, the Gorges of Hérault, the Pont du Gard (Roman Aqueduct) and the Abbey of Vézelay (see Maps 1 and 2).

<sup>2</sup> The final report of the research “Outstanding sites as a resource for territories“ is available from the authors or from the PUCA. It brings together in particular all the statistical elements that are not exhaustively included in this publication.



Outstanding heritage sites, due to their both fragile and touristic nature<sup>3</sup>, are at the heart of multiple issues and sources of opposition and tension which public and private players in all the fields of intervention have to address. Therefore, the eco-responsibility issues and principles of public policies and private initiatives entail finding solutions to resolve the difficult equation imposed by the sustainable development paradigm: reinforcing economic efficiency, preserving natural resources and improving the social situation of populations, all in a context of increasingly scarce public funds. The sustainable development imperative has consequences with regard to how the issue of heritage and landscapes is envisioned. The classification criteria for the heritage or landscape objects selected are also changing. Therefore, heritage should not only be preserved, but also enhanced, or created *ex nihilo*. In the field of land planning and development, for example, the major urbanisation, energy, industry and tourism projects endeavour to find solutions to conciliate development and conservation, economic growth and environmental and heritage protection. The modes of (public) action are themselves transformed, which creates the need for new benchmarks.

<sup>3</sup> This generic term designates our study areas, namely the sites of the Grands Sites de France Network, the sites featured on the UNESCO world heritage list and the similar sites studied in other European countries (see below – methodological precisions).

For the sake of conciseness, liberties are taken with regard to the instituted denomination of the sites. Thus, for the sites recognised under the Grands Sites de France Network, sites that have been awarded the label are designated as RGSF sites and the sites in the labelling planning stage are designated as OGS. The sites featured on the world heritage list are designated as UNESCO sites.

## Revealing the forces in tension to better map out paths towards balance

Outstanding heritage sites are areas which crystallise this intense and complex involvement of a priori centrifugal forces. They are, in that sense, extremely stimulating operational laboratories for research in regional sciences. They are places where values, symbols, and issues confront each other, which can lead to real social, economic and environmental innovations, but can also generate conflicts over access to resources, lead to a confiscation of the public property, or even result in a rise of autonomy claims in some territories (Guérin, 2009). The question arises of identifying paths towards balance between these dynamics which are both complementary and antagonistic.

When the sites are organised around a natural curiosity or a historical monument, for example, their operational management must seek a balance – which often remains unstable – between two types of logic which seem to come into conflict, between two orthogonal lines of arguments (Fagnoni, 2013), which are economic profitability, based on the opening to the public on the one hand, and ecosystem conservation on the other hand (Meur-Férec, 2007). Whereas opening to the public can indeed be a means of preserving natural and cultural areas, it is easy to conceive that it is an extremely delicate balance, which depends on the nature of the site, its management and the territorial context.

At the centre of the approach developed lies the assumption that tensions emerge on each of the levels – economic, financial, social and environmental – for exceptional heritage sites as well as in the conciliation of the issues relating each of these dimensions, in the consensus and oppositions between the protagonists. In parallel, these issues, their points of convergence or divergence, take particular forms according to the types of sites and also according to the types of territories which they are part of. The aim of the research therefore consists in revealing what the tensions present are, how they vary according to the sites and territories and equally, what paths towards balance are found or not found locally.

The issues mentioned echo the value given to landscapes and heritage; they still underlie specific management methods.

## The value of landscapes and heritage

Many works are being developed around the concept of the Total Economic Value (TEV) of a park, a protected site or more generally of a landscape. The TEV is based on three distinct values:

- the economic value measured by the receipts and revenues generated, particularly by tourism;
- the social value that the users and non-users place on the site;
- the value of environmental services.

The Total Economic Value of a landscape can thus be summarised in a figure of a few million or billion dollars depending on the cases. It can then be balanced with the costs incurred by the local authorities. For each of these stages, we have specific methods and tools, which are subject to many criticisms and controversies. The advocates of this type of monetary valuation see it as a means of raising the public authorities' awareness about the issues, in particular environmental ones (Costanza et al., 1997), of facilitating decision-making by giving a price to what until then had none, of comparing agricultural projects (Porter et al., 2009; Aznar et al., 2009), rural development projects (Goldman et al., 2007), etc.

Whether in the field of culture or that of the environment, these approaches also have their opponents who detect that there is a risk of erasing the temporal, spatial and cultural specificities and thereby, of biasing the decision-making (Turner et al., 1998). One may also emphasise the inter-site competitive nature that this type of calculation involves. It is not so much the idea of a real economic issue associated with cultural and natural (Grefe, 2003; 2011) or environmental assets that we denounce, but an "economisation" which is too abstract, a financialisation of the heritage issue which introduces risks of sliding towards "entertainment" whereas it is a "cultural transmission between generations [...] and a heritage that is the property of all" (Benhamou, 2012).



These findings have a major consequence: whereas the value and economic importance of the landscapes and heritage are central for the sites and for territorial development, their social and environmental dimensions are also primary. Our approach integrates these three dimensions and analyses how they are inter-related. Furthermore, whereas the approach to the sites cannot be reduced to their economic value, it remains true that their preservation, enhancement or restoration... require financial resources and an efficient management of those resources.

### **The (financial) management of the sites at the heart of balancing issues**

The financial management of outstanding heritage sites, the arrangements for funding preservation and/or enhancement activities are complex, and raise concerns both due to the nature or the type of heritage properties that they host and to their modes of governance. These properties are partly public (Benhamou, Thesmar, 2011). Their national or international interest is the basis for the granting of their heritage status. They fall under various policy measures (in particular European ones). These are all elements that justify a financial intervention from the public authorities in their favour. However, the new constraints of careful use of public funds call into question the spending models of local authorities in general (Gilbert, Guengant, 2014) and of those involved in the sites' management in particular. At the very least, the tightening-up of budgets requires them to reconsider the financial arrangements as they were locally developed until then.

As regards outstanding heritage sites, financial organisation difficulties are greater since their management often involves a multitude of actors. Indeed, the extent of the site, on the basis of a management logic, rarely coincides with an institutional district, with a political reality and fiscal and financial autonomy. The management often entails the setting up of an *ad hoc* structure, bringing together all the parties, from the local level to the national level, including diverse competences and resources... In the image of what is true in our territorial system, outstanding heritage sites are caught in

an interlocking of government levels and superimposed procedures. Outstanding heritage sites however square ill with “ordinary“ operating conditions. The objectives – between preserving and attracting – are complex to achieve; the visitor flows (in their extent, seasonality or location) lead to the emergence of specific needs. This results in intense costs for coordination, ensuring coherence.

This complexity and cumbersomeness, as well as the fundamental character of the organisation of resources to serve objectives are moreover reflected in the positions adopted, both at the level of the Grands Sites de France network and at the level of UNESCO. Thus, each property included in the world heritage of humanity must benefit from an adapted protection and management system to ensure its safeguarding effectively (UNESCO, 2014). The management plan designed as a consequence includes “budgeting, for the effectiveness of protection and management, of resources available and to be programmed, and of the necessary human, technical and financial resources” (Watremez, 2013).

## The concept of resource at the centre of analyses

Introducing the notion of resource as the guiding thread of the publication makes it possible to study the conditions for the emergence of a balance between the economic, financial, social and cultural, and environmental dimensions underpinning the outstanding heritage sites.

The resources of the territories are multiple and refer to many theoretical and empirical postulates. Hence, the resource can be territorially generic or, on the contrary, specific to the location; it can be diffuse or localised, abundant or rare, exhaustible or renewable, material or intangible, exogenous or endogenous, urban or rural ... It can be a production and/or a consumption resource. The transition from the idea of resource to that of “territorial resource” introduces the idea of specification by the territory and invites us to take into consideration their governance (Gumuchian and Pecqueur, 2007; Mollard, 2001; François et al., 2006).

Recent work on the forms of “refocusing” economic, cultural and social activities – of which the districts are one of the forms – have provided insights into how these re-

sources were used by the various categories of local actors in a territorial development process (Bagnasco, Courlet, Novarina, 2010). Other research has shown how actors, in particular through the development of cooperation, are able to transform constraints into resources (Novarina, 2011). This research perspective seems especially fruitful when it is applied to landscapes and heritage. These mobilisations enable new forms of cooperation to be created around a common heritage by integrating the development of economic activities, enhancement of cultural resources, and preservation of the environment and landscapes. Whereas initially the temptation is to consider outstanding heritage sites as territorial resources, it appears equally important to consider that the territories may, in turn, be a resource for the sites.

The co-management of those different kinds of resources makes it possible to envisage possible complementarities between modes of development previously deemed impossible to reconcile. The analysis of interactions between amenities, productive socio-economic, residential, and tourism dynamics and types of territories provides new elements of understanding concerning the factors in territorial development, from the metropolis to rural areas (Talandier, 2014). This work provides insights to reconsider landscapes and heritage as genuine economic resources - including metropolitan resources - and not only as territorial attributes that are costly to maintain. If we accept the principle of a resilient heritage (Berdoulay, Soubeyran, 2013) – marked by reflexivity, coevolution, coadaptation between nature and society (Simon, 2006) – and not that of a resistant heritage – frozen, closed, cut off from the world, timeless and groundless – it becomes possible to replace outstanding heritage sites in their spatial, social and cultural environment in order to better understand their complexity and their issues, and also to consider appropriate management methods for the diversity of both the sites themselves and their territorial contexts.

The question of the modes of governance and management, of the role of rulers and managers, then appears central. Placed at the heart of the tensions, of the institutional system and the interplay between actors, they are responsible for the trade-offs between the converging or diverging territorial issues raised by the various parties involved. The socio-economic-environmental and financial balances (or lack of balance)

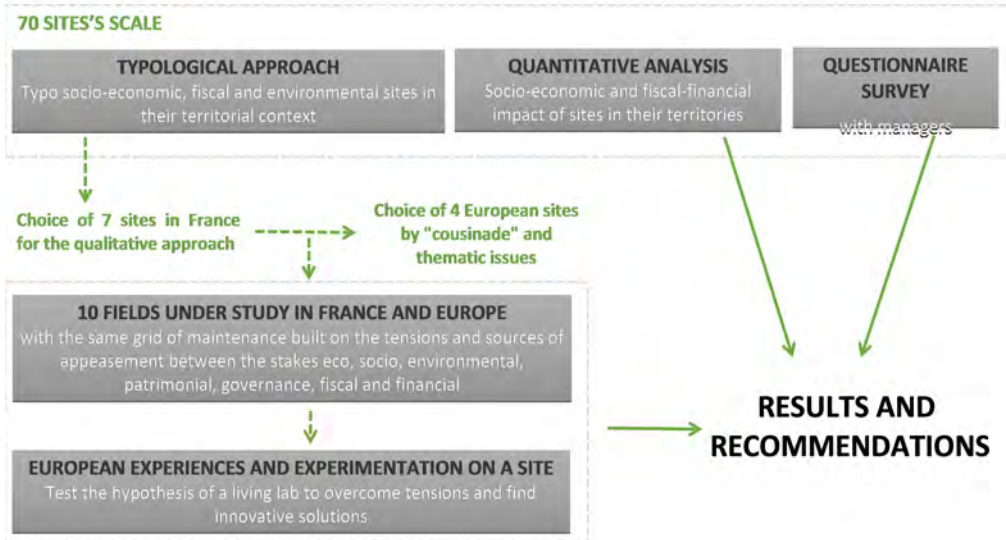


depend both on the regulation methods they introduce, and on the coproductions they undertake or generate. These are all necessary conditions for outstanding heritage sites to constitute real resources for territorial development.

### **A mixed methodology**

This publication seeks to show under what conditions outstanding heritage sites effectively represent resources for territorial development. This work aims to analyse the processes through which these (inter) dependencies are built, the tensions to which these processes lead, according to the sites, the territories they are part of and the dimensions involved. Indeed, the territorial context of the sites as well as the heritage sites themselves are extremely variable from one place to another, which undoubtedly determines the economic development, the governance, the site management, the environmental impact or the sociocultural appropriation. In order to take as full account as possible of this territorial diversity and not be limited to monographic approaches, the choice of a mixed research method was made, in order to combine quantitative and qualitative elements of analysis, and to understand the multiscale dimension of economic and social realities. The method includes five sequential and mutually complementary phases (Figure 1).

Figure 1: Diagram of the methodological approach of the study  
Source: Drawn up by the authors



As a prerequisite, all the 70 outstanding heritage sites in France were characterised through typologies addressing the diversity of socio-economic, fiscal and environmental contexts. In doing so, the idea is to highlight the main characteristic features of the territories hosting outstanding heritage sites, and thereby improve the understanding of pre-existing disparities, but also to better detect the possible impacts of these sites. The typologies also justify the choice of the seven study areas in France combining a strong heritage interest and some form of representativeness of the contexts identified: the Nord-Pas-de-Calais Mining Basin, the Poitevin Marshland, the Somme Bay, the Canal du Midi, the Ochre Cliffs of Roussillon, the Decorated Cave of Pont d'Arc of Ardèche (known as Grotte Chauvet-Pont d'Arc) and the rebuilt city of Le Havre (see presentation of the sites in Appendix). In order to take a step back and provide a wider perspective, five sites were also investigated in Europe by virtue of their similarities with the French case studies and the importance of the economic and heritage issues taking place there (Emscher Park in Germany, Valley of Anana in Spain, Piedmont in Italy, Chaux-de-Fonds – Locle in Switzerland, Megalithic temples of Malta).

Paying attention to the diversity of territorial contexts, a statistical analysis was performed on the scale of the 70 sites to measure the socio-economic and fiscal impact of the sites on their territories, to characterise their environmental situation. At the interface of the statistical analyses and the field work, a questionnaire survey was also made available online to all the managers of the French sites to gather their opinions and their feedback on those key points that the overall approaches could not cover. Lastly, a more exploratory work involved, on the one hand, identifying innovative experiences in the conciliation of territorial issues in the various study cases, and on the other hand, experimenting – in the case of the Canal du Midi – with two creative workshops bringing together private and public stakeholders and members of civil society.

The diversity and complementarity of the methodological arrangements implemented make it possible to understand the territorial specificities of the heritage sites, to objectify the dynamics concerning them, and to identify and then analyse the useful levers for action both now and in the future; foreign experiences are also mobilised, not for strictly comparative purposes, but with a view to identifying differences and other ways of doing things that contrast with the practices of national actors.

The analytical results of this research are covered in this publication and are divided into two main parts. The first replaces outstanding heritage sites in their territorial context. It sets out the concepts mobilised, details the typologies characterising the territories of the study sites and proposes an analysis of the impact of the sites on the socio-economic and fiscal-financial development of the territories.

The second part thematically develops the tensions, the issues and the balances found or to be invented in terms of governance, management, economic development, landscape sensitivity, and the socio-cultural impacts of the sites in their territory. Finally, the conclusion opens up new perspectives by underlining how the study of outstanding heritage sites also reveals major issues for “ordinary” situations and territories.



PART 1

**OUTSTANDING  
HERITAGE SITES  
AND TERRITORIES:  
AN EXCHANGE OF  
BEST PRACTICES**



The territorial approach is pre-eminent in the research conducted: it requires us to take a look at all the outstanding heritage sites and each of them, considered in its multiple interdependencies, its local context of belonging, to such an extent that one can speak of a real territorialisation of the investigation approach.

To overcome bias, this positioning is made explicit in the light of the concepts used and the meanings retained. The denomination of outstanding heritage sites invites reflection on the process whereby the outstanding is constructed. Heritage, or rather heritage properties, when they benefit from this exceptional nature, receive in return a number of qualities: they are both resources and properties to which individual and collective, private and public, past, present and future uses, confer a number of specificities which immerse them in an intricate set of issues and interactions between protagonists which may be either favourable or unfavourable to the site development. A first stage of the approach consists of exploring this diversity of possible configurations, by federating it, through typological constructions. The latter reveal a few main typical figures, which appear today as products of trajectories pursued by the sites and their territories over a long period that cannot be omitted. Far from being detours, these initial investigations have the advantage of an essential acculturation with the situations of outstanding heritage sites in general, and with those selected as study areas in particular.

The contexts being given, the statistical analyses reveal whether or not and how, from a socio-economic angle on the one hand, and in terms of budgetary means and their management on the other hand, the sites and their territories have the capacity to more or less easily, or sustainably, create a system. Are there configurations that appear more or less conducive to territorial development?





CHAPTER 1

**TERRITORIALISATION  
OF OUTSTANDING  
HERITAGE SITES**

Laure Cormier  
Pierre-Antoine Landel  
Françoise Navarre  
Jean-François Ruault  
Magali Talandier



In metropolitan France, 70 heritage sites are considered as outstanding insofar as they are included on the UNESCO world heritage list or are recognised under the Grands Sites de France network. These two recognition processes differ from one another both in their objective and in their inscription or labelling procedure. The two approaches, as well as the location of the 70 study sites, are specified in this chapter. Furthermore, different frameworks for territorial analysis are used in this publication. Some of the concepts are developed by the authors themselves, others are simply taken from the existing literature. All are ultimately aimed at consolidating a common language on which the scientific demonstration is based. The development dynamics and the notion of territorial resources thus assume a special place in the concepts and the theoretical foundation adopted. Finally, the territorial approach which is favoured here by the authors leads them to reveal the importance and diversity of the contexts of heritage sites, where the site management policies are deployed. A socio-economic, fiscal-financial and environmental typological approach is developed at the end of the chapter.

## 70 UNESCO sites and/or Grands Sites de France considered as outstanding heritage sites

A brief reminder of the procedures for the designation of heritage sites, objects of study, and their evolution is essential, in order to identify the specificities of each of them as well as their common base. Whereas each heritage site is specific, the labelling or inscription process contributes to giving it a status based on various normative requirements, and implying a relative standardisation. The latter then justifies the categorisation of the properties and sites concerned as objects of study.

The procedure for including sites on the UNESCO world heritage list has changed. Until the 2000s, a downward logic determined the roles: the central government and the ministries were responsible for initiating the labelling process, and then for the perpetuation of the Outstanding Universal Value (OUV) of the property, once it was included. This property then has an unclear contour<sup>4</sup>, there is not always a management plan specifying the guidelines for its maintenance. The procedure has evolved since then, the requirements have both changed and increased. The State remains the interlocutor

of the World Heritage Committee, which warns it in the event of a lack of management and/or protection, for example<sup>5</sup>. Such defaults may lead to the loss of the inscription.

The ministries (in charge of culture, environment, land planning and development...) continue to be involved in the approach, but rather as sources of support for the inscription initiatives coming from local actors and prescribers. The properties included before 2007 are subject to remedial measures for entry into the register which is now common. Thus, the development of a management plan, a strategic document that addresses a variety of imperatives<sup>6</sup>, becomes an obligation, from the stage of the candidature. This plan, as a reference frame common to all the actors of the territory<sup>7</sup>, must federate the stakeholders and their actions. It can include the joint taking into account of complementary approaches: the regulations and planning, essential to the preservation of the property, as well as the contract agreements between the various stakeholders (Alessandri, 2012). In general terms, the procedure undertaken and the obligations contained therein set the instrumental mechanism and its organisational methods, while aiming to ensure their sustainability<sup>8</sup>. In particular, “the World Heritage Committee carefully assesses that all the actors are involved, support the inscrip-

<sup>4</sup> The perimeter of the buffer zone is not always defined. “A buffer zone contributes to providing a further degree of protection to a world heritage property. The concept of a buffer zone was introduced for the first time in the Guidelines for the implementation of the World Heritage Convention in 1977. In the last version of the 2005 Guidelines, the inclusion of a buffer zone in a World Heritage List inscription file is strongly recommended, but not mandatory.

Many world heritage properties face problems arising directly or indirectly from their buffer zone. New constructions within a buffer zone can have an impact on a world heritage property, or threaten its outstanding universal value, just as a new legal status of the buffer zone can have an impact on a site’s conservation, protection or management plan.” (source: Unesco, <http://whc.unesco.org/fr/evenements/473/>)

<sup>5</sup> A reinforced monitoring mechanism was put in place for the property of Bordeaux when the preservation obligations were not fulfilled, Dresden lost its inscription ...

<sup>6</sup> Such as “the conservation, the respect for universal values, the didactic presentation of the site to facilitate its understanding by the various audiences, or the economic and social value for the benefit of the local population” (source: Management plan for the property of the Episcopal City of Albi, 2009)

<sup>7</sup> For example, that established for the Val de Loire (source: [http://www.centre.developpement-durable.gouv.fr/IMG/pdf/Plan\\_Gestion\\_VdLpm\\_0713\\_HD\\_partiv2\\_cle56b515.pdf](http://www.centre.developpement-durable.gouv.fr/IMG/pdf/Plan_Gestion_VdLpm_0713_HD_partiv2_cle56b515.pdf))

tion of the property and will continue to act after the inclusion, where necessary.” (Dumesnil, 2006).

The UNESCO projects now sometimes stem from “citizen” initiatives, and then mobilise various government levels, multiple actors, both public and private (Courvoisier and Aguilhaume, 2010). At least for the recent labelling procedures and from a formal standpoint, the local level is more involved in the action initiated around these world heritage properties. So there are similarities with the OGS procedure or the RGSF labelling, which is itself evolving.

Originally, the Grands Sites de France Operations (OGS) were under a real State control. While involving a multitude of deconcentrated entities<sup>9</sup>, the “OGSs exceed (...) the strict missions of the MEDD [Ministry of Ecology and Sustainable Development], which takes up this mechanism to become an actor of territorial development beyond the purely environmental aspects falling within its core competences.” (Duval, Gauchon, 2007). Among the criteria to be fulfilled for labelling under the RGSF is the requirement that the site be classified (in the sense of the law of 2 May 1930 and of Art.

<sup>8</sup> Thus for example, “On 1st January 2013, the Mining Basin Mission (French: Mission Bassin minier) officially became the management structure of the “World Heritage” Label, in close coordination with the State services.” (source: <http://www.missionbassinminier.org/nos-chantiers/patrimoine/le-bassin-minier-paysage-culturel-evolutif.html>).

“The Mining Basin Mission is an association under the law of 1901 created in May 2000. It integrates representatives from various structures which contribute to its operation (State, Region, Departments, intercommunal structures, Association of Mining Communes (ACM) and associated members (Caisse des Dépôts et Consignations, Natural Regional Park (PNR) Scarpe-Escaut).(source: <http://www.missionbassinminier.org/la-mission.html>)

<sup>9</sup> Regional Directorates of Cultural Affairs, Regional Directorates of Tourism, Departmental Directorates of Youth and Sport, Departmental Directorates of Agriculture and Forestry, Departmental Directorates of Public Works, departmental services of Architecture and Landscapes ...

L 341-1 et seq. of the French Environmental Code, as an extension of the law of 21 April 1906). It must be of national interest<sup>10</sup>. The classification and its ministerial issuance are the basis of the existence of an administered geography of recognised or labelled places. An assessment performed in 2009 and relating to the recognitions made until then under the network, aimed at “establishing as a real State policy, with its attributes of public power, the remarkable achievements of field experiences.” (CGEDD, 2009). The aim is indeed to draw upon these experiences and the very terms of the procedure imply a finally ascending (bottom-up) logic. The classified site (or its surroundings) must “be subject to a commitment to rehabilitation and sustainable management, supported by a broad consensus at the local level”<sup>11</sup>. The OGS therefore ensures from the outset that the outstanding site is part of a temporal logic, a project approach, and operational guidelines that will be in tune with the other existing regulatory mechanisms, with their local versions. The project often aims, through rehabilitation and/or development actions, to remedy the disorders resulting from over-frequentedation. Its development and its effectiveness call for a prior multi-actor negotiation<sup>12</sup> and the existence of a supporting structure. The latter is essential from the start of the procedure since only a management structure<sup>13</sup> can join the network, and not the site itself (Duval, Gauchon, 2007). In actual fact, even if the State is always present, the place of local representation is essential.

<sup>10</sup> In other words, be a remarkable, symbolic landscape, or with a widely recognised and socially established cultural significance.

<sup>11</sup> Source: <http://ct78.espaces-naturels.fr/operation-grand-site>

<sup>12</sup> Which may even be very conflicting, the OGS Gorges of Ardèche could be the typical example (Duval, Gauchon, 2007).

<sup>13</sup> A joint association (Syndicat mixte) in general.

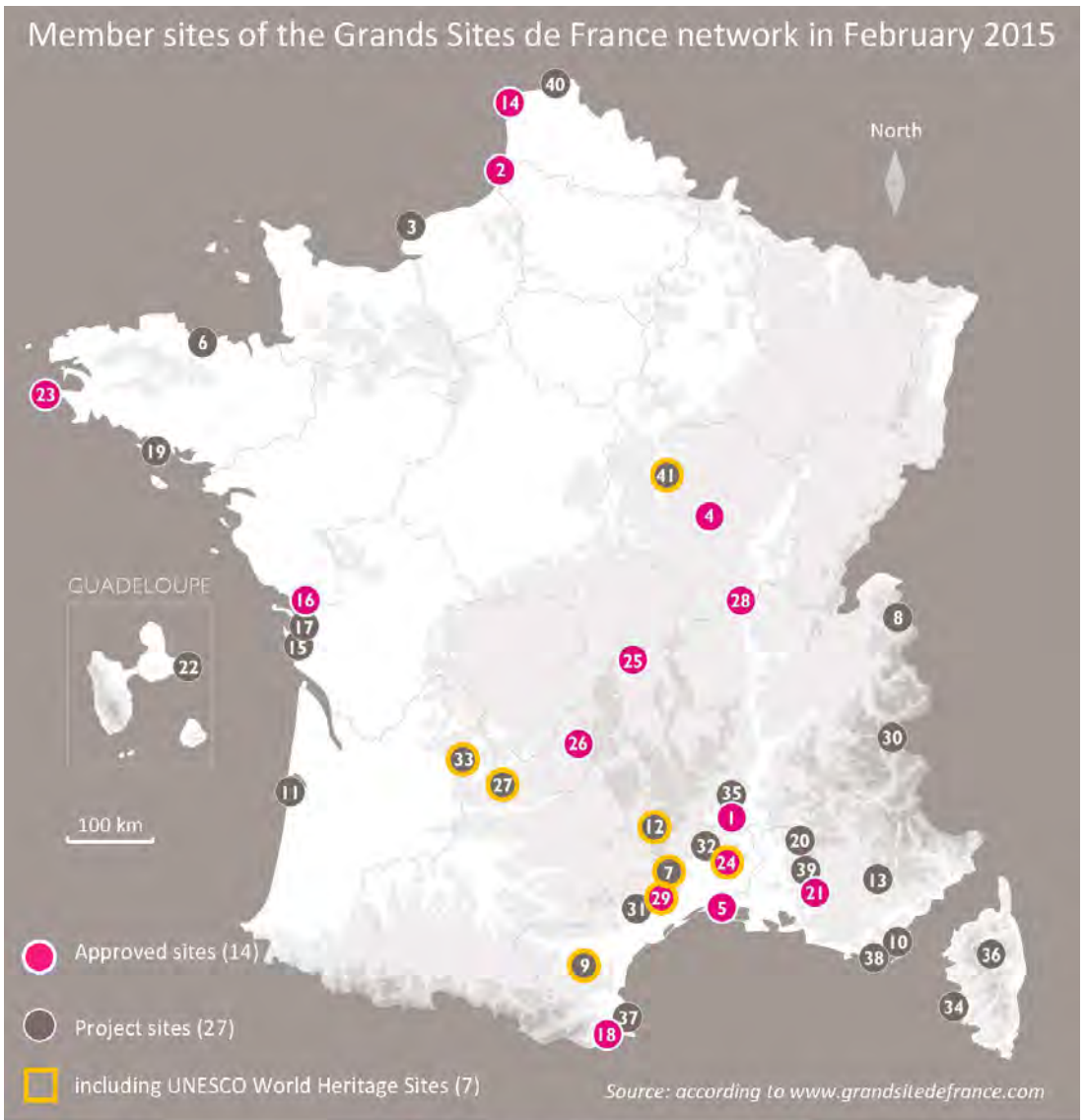




Marais Poitevin © Laure Cormier

As a result of these various recognition procedures, as of the study date, 70 sites are listed as UNESCO sites and/or as Grands Sites de France in the country (Maps 1 and 2) and form the set selected as outstanding heritage sites.

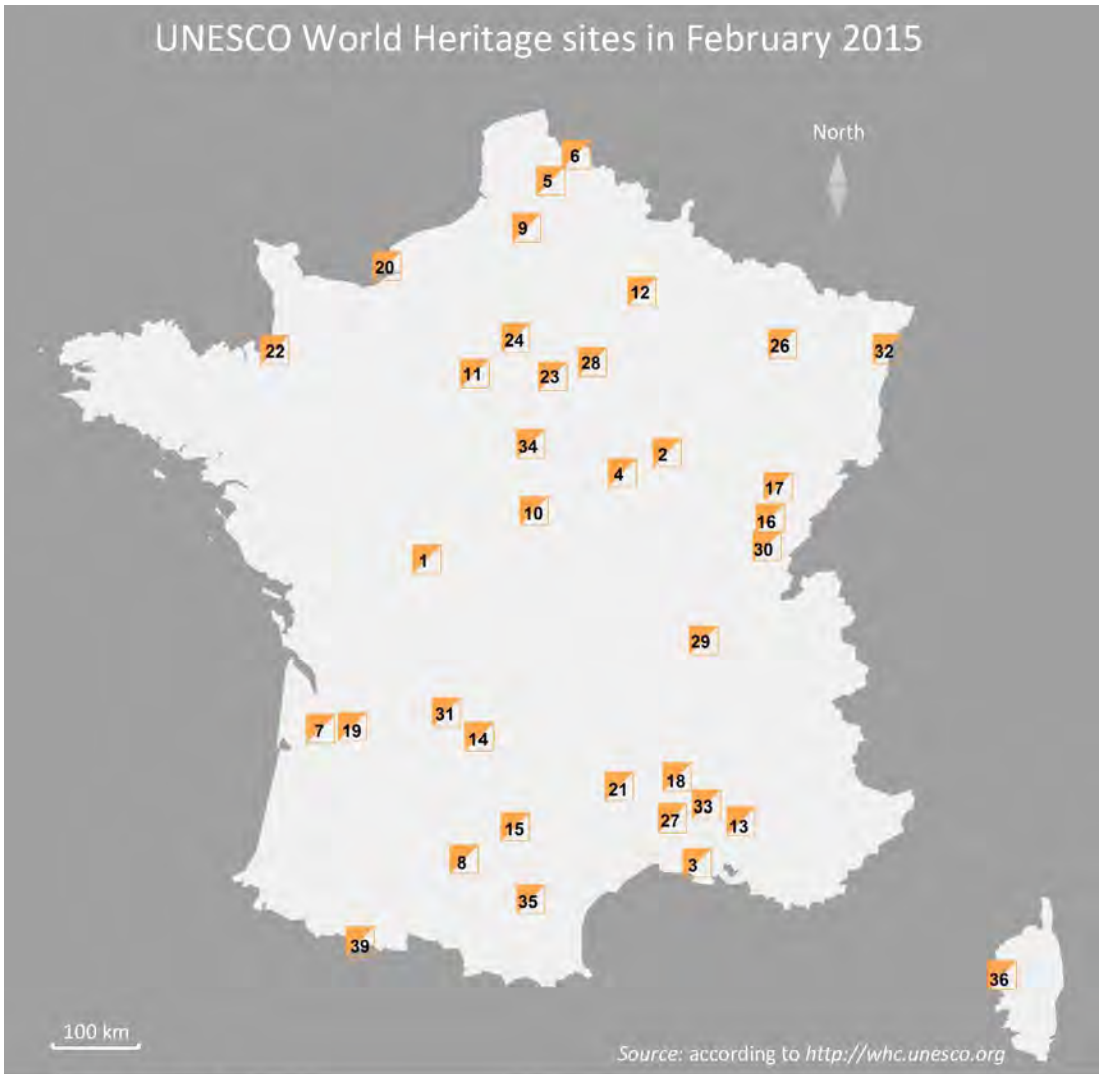
Map 1: The Grands Sites de France  
 Source: Drawn up by the authors



- |  |  |  |
|--|--|--|
| ● (1) Aven d'Orgnac                                  | ● (15) Marais et Place Forte de Brouage                        | ● (30) Vallées de la Clarée et Étroite         |
| ● (2) Baie de Somme                                  | ● (16) Marais Poitevin   | ● (31) Vallée du Salagou et Cirque de Mourèze  |
| ● (3) Falaises d'Étretat, Côte d'Albâtre             | ● (17) Estuaire de la Charente, Arsenal de Rochefort           | ● (32) Gorges du Gardon                        |
| ● (4) Bibracte-Mont Beuvray                          | ● (18) Massif du Canigó  | ● (33) Vallée de la Vézère                     |
| ● (5) Camargue gardoise                              | ● (19) Massif dunaire de Gâvres-Quiberon                       | ● (34) Îles Sanguinaires – Pointe de la Parata |
| ● (6) Cap d'Erquy - Cap Fréhel                       | ● (20) Mont Ventoux  | ● (35) Gorges de l'Ardèche                     |
| ● (7) Cirque de Navacelles                           | ● (21) Sainte-Victoire   | ● (36) Vallée de la Restonica                  |
| ● (8) Cirque de Sixt Fer à Cheval                    | ● (22) Pointe des Châteaux                                     | ● (37) Anse de Paulilles                       |
| ● (9) Cité de Carcassonne                            | ● (23) Pointe du Raz en Cap Sizun                              | ● (38) Presqu'île de Giens, Salins d'Hyères    |
| ● (10) Domaine du Rayol, Le Jardin des Méditerranées | ● (24) Pont du Gard  | ● (39) Massif des Ogres                        |
| ● (11) Dune du Pilat                                 | ● (25) Puy de Dôme   | ● (40) Dunes de Flandre                        |
| ● (12) Gorges du Tarn, de la Jonte et des causses    | ● (26) Puy Mary - Volcan du Cantal                             | ● (41) Vézelay                                 |
| ● (13) Gorges du Verdon                              | ● (27) Rocamadour  |  |
| ● (14) Les Deux Caps Blanc-Nez, Gris-Nez             | ● (28) Solutré Pouilly Vergisson                               |  |
|  | ● (29) S <sup>t</sup> -Guilhem-le-Désert – Gorges de l'Hérault |  |



Map 2: The UNESCO sites  
Source: Drawn up by the authors



UNESCO World Heritage sites (39)  
37 in metropolitan France

- |                                       |   |   |
|---------------------------------------|---|---|
| 1- Abbatiale de St Savin sur Gartempe | 14- Rocamadour chemin St Jacques de Compostelle | 27- Pont du Gard                          |
| 2- Abbaye de Fontenay                 | 15- Albi Cité épiscopale                        | 28- Provins ville et foire médiévale      |
| 3- Arles monuments romains romans     | 16- Salins les Bains entre les Salines          | 29- Lyon site historique                  |
| 4- Basilique colline Vézelay          | 17- Besançon Fortifications Vauban              | 30- Sites préhistoriques autour des Alpes |
| 5- Bassin minier Nord Pas de Calais   | 18- Grotte Chauvet                              | 31- Sites et grottes Vallée de la Vézère  |
| 6- Beffrois Belgique France           | 19- St Emilion Jurisdiction                     | 32- Strasbourg Grande ile                 |
| 7- Bordeaux Port de la Lune           | 20- Le Havre ville reconstruite A. Perret       | 33- Orange Théâtre antique Arc Triomphe   |
| 8- Canal du Midi                      | 21- Causses Cévennes paysage culturel           | 34- Val de Loire de Sully à Chalonnes     |
| 9- Amiens Cathédrale                  | 22- Mont St Michel et sa baie                   | 35- Carcassonne Ville fortifiée           |
| 10- Bourges Cathédrale                | 23- Fontainebleau Palais et Parc                | 36- Golfe de Porto                        |
| 11- Chartes Cathédrale                | 24- Versailles Palais et Parc                   | 37- Nouvelle Calédonie Lagons             |
| 12- Reims Cathédrale Abbaye Palais    | 25- Paris rives de la Seine                     | 38- Ile de la Réunion                     |
| 13- Avignon centre historique         | 26- Nancy Places                                | 39- Pyrénées Mont Perdu                   |

## Heritage, a property and a resource

In order to develop, on a daily basis the territories mobilise and create resources which may include the heritage resource, with the particularity for the latter of being a different property from the others.

### Outstanding heritage sites as a territorial resource

The territory is defined in this publication as a complex system of places, links and actors which never ceases to build and renew itself depending on its socio-cultural, geographic, political and historical context. (Talandier, 2016). It is both an actor and a factor of economic and social development on different interwoven scales. The analytical and operational issue of territorial development is no longer only a question of resource allocation, of distance and access to the market, it is based on understanding and implementing the capacity of this constantly evolving system. The role played by local institutions, interactions between actors and multiple proximity effects (Torre, Rallet, 1994) are all elements which determine the development of these systems. Very early, the theories of endogenous development, or from below (Stöhr et Taylor, 1981) emphasised the existence and the role of an innovative local environment (Aydalot, 1986), the importance of specific assets (Colletis, Pecqueur, 1993; 1995) or the issue of an activation of territorial resources (Gumuchian, Pecqueur, 2007; François et al., 2006).

The notion of territorial resource used in this work is part of this school of thought which defines local development as a players' action process likely to enhance the resources specific to the place. The territorial resource is defined as "a constructed characteristic of a specific territory, in a development perspective." (Gumuchian and Pecqueur, 2007). Each territory has its own (specific) resources in a latent state, unidentified and non-valuated. It is the mobilisation and the coordination of actors which will make it possible to transform this resource into a specific asset, into a resource for the territory. The specificity of this activated resource, the fact that it exists only here in

this form, protects the territory from competition and enables the actors to generate a territorial income.

Thus, outstanding heritage sites are capable of constituting a specific resource for the territories as long as the actors are conscious, mobilised and organised in order to preserve and enhance this heritage. If the site's outstandingness is sufficient to make the property or landscape specific and non-comparable, as elsewhere, its activation rests upon the mobilisation and organisation of the actors. The capacity of the sites to generate a local dynamic therefore depends on endogenous factors, but also on exogenous factors, which will in turn influence the resources, and here, the sites themselves.

Territorial development is based on the question of the inside and the outside, on that of internal and external flows which irrigate the territories, and on that of the multi-scalar relationships that the actors build and maintain. Outstanding heritage sites are not an exception and are at the heart of issues, tensions, and economic flow systems, played out on different scales, mobilising a diversity of actors ...

### **Outstanding heritage sites as a heritage resource**

If outstanding heritage sites, under certain conditions, have the potential to become resources for territorial development, the role to be given to heritage as such in this process is to be questioned. Since the 1970s, the heritage field has been constantly expanding in its temporal, typological and spatial dimensions. Since it has been given a status allowing certain objects to be extracted from society's standard treatment, heritage seems to be detached from the simple banality resulting from globalisation. With historical, economic, artistic and social values, heritage is the result of a dual process of selection and transmission to the future generations. As such, "building our heritage is not so much a matter of the inherited symbolic and cultural order as it is of deliberation, collective choices, and to some extent a more legal or political order. An object is no longer patrimonial by nature, but because it is proposed to that end by subjects who agree to it" (Grefe, 1999).

Observing the operations of selection, justification, conservation, exhibition and enhancement makes it possible to understand the strategies and actions of actors present in the territories.

Outstanding heritage sites, in the course of their selection and recognition process, follow from the outset types of logic that are both downward, with a strong marking of the territory imposed by the public authority (Rautenberg, 2004), and upward, as local dynamics can lead the way. These dynamics are of key importance, as local societies appropriate heritage as an object that materialises a collective memory and shared values, and as local actors must usually ensure the site management action.

The issue of the conditions of anchoring of “classified” heritage in the territories is very acute. Appropriation is a key issue of this process. This is especially important since, a priori, heritage status is granted for the benefit of “inheritors” (for example the local population) and not of external persons (such as tourists) (Rautenberg, 2004; Senil, 2011). The issue of the uses of heritage appears central and sometimes contradictory to the process that produced it. It makes heritage a product, associated with other services, included as a powerful driver of tourist activity. The consistency of its link with the uses and symbolic contents of the past still remains to be addressed.

From these questions, arises the capacity of heritage to make sense for the territory, and in fact, the stages of the heritage process can be sources of collective agreements or conflicts. The latter will be particularly important if the heritage process is based on designation and if the latter is perceived, at least by some, as illegitimate. This is likely to generate identity reactions which can be negative and be at the root of conflicts for the territory, which will then make the object’s management more complex. This identity-giving function of heritage results in a double movement. The first, as we have said, refers to appropriation, which will accompany the specification processes for territories by distinguishing them from other ones. The second movement concerns belonging. Heritage promotes a feeling of attachment to the group which appropriates it and

confirms in this way its existence. “Collective identity is a discourse that groups hold on themselves and on other ones to give meaning to their existence” (Claval, 1996). Heritage serves in this case as a powerful link between the actors and inhabitants of the territory. The risk is a sectarian approach and the territory’s confinement around heritage objects whose use would not be open to other groups, be they short-lived as tourists can be.

The inscription on UNESCO’s world heritage list or membership in the Grands Sites de France Network (RGSF) as such seem representative of a system which attempts to combine the heritage, education, cultural, social, urban planning, architectural, landscape, and tourism fields by using various spatial scales. Heritage is not only perceived as a product for tourism purposes. It is increasingly conceived as a resource through its capacity to support the construction of territories, to reinforce their autonomy and their capacity to develop relations with other territories, as well as to support change and transition processes.

Case studies in France and abroad offer us tools for interpreting the diversity of territorial trajectories, with respect to heritage processes. The process itself leads to the definition of the heritage resource as a “tangible or intangible object that is revealed and transmitted by a social group and integrated into a project for its temporal reference, in order to ensure its durability” (Landel, Senil, 2016). By mobilising time, heritage participates in its enrolment in the action, in the construction, and in the local dynamics. The aim is for heritage to “do with” time, just as the territory “does with” space.

### **Outstanding heritage sites, places for managing public, collective or common goods?**

In her analysis of the particularities of UNESCO properties, F. Benhamou (2010) acknowledges that whereas the field covered by heritage is subject to fluctuations, the properties concerned have common characteristics and “all refer in one way or another to the notion of public good, at the basis of the notion of global public good. “Owing to the conceptual and operational proximity between the notions of public, collective or common goods, the meanings retained in the publication, echoing those of heritage, are specified, as well as the resulting questions, in terms of the modes of governance or management of outstanding heritage sites.

Thus, the scenery of the Combe Pont d’Arc and its surroundings is available to everyone. The creation of the Pont d’Arc Cavern aims to make masterpieces that are a constituent part of humanity’s heritage accessible to all, but access to this facsimile reconstruction is restricted. The entrances into the cave known as Grotte Chauvet itself are even more so... The elements present in outstanding heritage sites do not all appear public.

In fact, it is not sufficient that a property is open to all visitors for it to be declared as public. ‘Public goods’, in the economic sense of the term and according to the theoretical formalisations that have been made thereof (Samuelson, 1954; Musgrave, 1959) have (at least) two characteristics, in connection with their ownership and appropriation conditions. One is called ‘non-exclusion’: once it exists, the good is available to all and nobody should be excluded; it is indivisible in its consumption. The other is called ‘non-rivalry’: what is consumed by some is not deducted from what is available to others.

Owing to these properties, public goods cannot give rise to a private appropriation or to the collection of payments in return for their uses. As a consequence, their maintenance, preservation, and so on, are not sources of profitability for companies. The mar-

ket or individual actions cannot be relied on for the goods in question to be available in sufficient quality and/or quantity. This requires collective actions, often managed by the public authorities. Furthermore, since public goods cannot be sold, their financing is largely based on taxes and therefore on the action of governments, which are the only taxation power holders. The properties of the goods, therefore, have consequences in terms of management or governance, and resource mobilisation.

Public goods that have both of the characteristics mentioned are rare and are then called pure. The landscape is one of them. Along with such goods, there are others for which the users are not rivals, but which are, however, reserved for a restricted public, most commonly visitors who have paid the required entrance fees. The same applies to museums, facsimile reconstructions, and so on, which are often present in outstanding heritage sites. These are indeed ‘club goods’ or ‘toll goods’.

Other places, often because they are open, cannot lend themselves to the collection of entrance fees or be intended for certain users rather than others. This is the case for forests, natural areas, and so on. However, the sites lose their quality when use becomes heavy. The consumption of some is, therefore, no longer compatible with that of others. Such goods are listed in the category of ‘common goods’.

Figure 2: Typology of goods: from private goods to public goods (pure)  
 Source: Realisation of the authors

	Exclusion	Non-exclusion
Rivalry	Private goods e.g. housing...	Common goods e.g. forest, natural resources...
Non-rivalry	Club or toll goods e.g. museums, facsimile reconstructions...	Pure public goods ( <i>Collective goods</i> ) e.g. landscape...

Figure 2 gives a representation of the possible combinations from the non-rivalry and non-exclusion characteristics. In reality, there is a continuum of situations between the various categories. The latter are porous and their content is variable. For example, a disturbance in the flow of entries to the Pont d'Arc Cavern would be sufficient for the quality of use to crumble, through an overcrowding effect.

The public qualities of so-called impure goods, which are neither really private nor purely public, and their maintenance, depend on regulation mechanisms resulting from the action of governments, based on a normative vision.

Such measures are commonly put in place for common goods in order to avoid their growing scarcity or their exhaustion. The key issue is to reconcile “the opening of access with the preservation of resources” (Viélard, 2009) or to create attractiveness, while ensuring that certain visitor flow thresholds are not exceeded. If these thresholds have been exceeded, damage remediation solutions must be found. We recognise issues that frequently emerge in outstanding heritage sites, justifying public actions. The Grands Sites Operations would be good cases of these situations.

Similar questions are raised even for goods that are apparently public, such as landscapes. In fact, individual appropriations and constructions are likely to reduce their accessibility to the greatest possible number of people. Their use is not guaranteed for future generations (Sgard, 2010). The public character of such goods is not permanently established without any intervention, and this quality is as much constructed as given from the outset. Heritage classification measures, site recognition procedures, and so on, would participate in this construction: many elements are public by decree, at least as much as by nature.



In reality, the management of common goods is based on a *de facto* tension: it is neither possible nor desirable to exclude certain uses, but it is necessary to do so... The threshold to be set to preserve the public character of the good is by political construction, a subject of debate and subject to contingency. The institutions in charge of determining it are placed from the outset in a position of uncertainty and exposed to conflicts. The governance of outstanding heritage sites is complex or even fragile as a result, especially as there “is indeed no single solution to the dilemmas of common resources” (Viévard, 2009).

Public interventions are still required to limit rivalry, an exclusion is established through the prices, for club or toll goods. In particular, the question of the tariff amounts to be used is raised. Financial return is not really the main imperative since, in any case, “in the absence of public intervention, the contributions of users alone would not be sufficient to maintain the heritage.” (Benhamou, Themsar, 2011). Tariffs are therefore necessary conditions, but are not sufficient means. How, then, can one exclude without the payment becoming prohibitive, while ensuring that it provides sufficient revenue to cover running expenses? Economic and management imperatives complicate the issue of usage rivalry.

The dilemmas are still recurrent when the time has come to designate the entity in charge of the actual management or maintenance of the site and heritage within it (Hugon, 2004). For some authors, only the goods managed by public entities should be designated as public (Harribey, 2011). For others, the responsible entity may choose to get a private player to manage the good rather than manage it itself; nevertheless, the very qualities of the goods concerned are not changed (Prud’homme, 2000). The question is common for local authorities and the services falling within their field of competence. It takes on a specific significance when there is an outstanding heritage site: the proper operation of certain equipment/facilities determines the future of the site itself and the interest of the tourist destination; the political and collective values attached to the places and to the goods square ill with the presence of private service providers, whose economic interests cannot be denied...

Furthermore, the heritage included in an outstanding site is rarely 'monolithic'. On the contrary, it is composed of a multitude of heritage objects. Each one, given its specificities and getting rid of a part of its individual dimensions, is the result of a recognition process and of its own designation procedure (see above) which in return gives it particularities, especially in its uses. Resulting from these mechanisms, each of the constituent elements of heritage included in outstanding heritage sites is public, but in a more or less pure, or impure way. The use of the site for tourism, or its exploitation, remediation mechanisms, and so on, bring about in turn the provision of equipment or services, themselves more or less public or private. The plurality of objects, characteristics or status often requires, on the part of the responsible entities, the formalisation of a diversity of intervention and management methods, as compromise formulas between various issues and actors.

The multiplicity of stakeholders prompts us to prefer the term 'collective' to that of 'public'. Much more than the second, the first has the advantage of referring to the plurality of uses and interests of the actors involved, in one way or another, in outstanding heritage sites. It has the merit of reflecting the collective dimension of heritage properties, in particular in terms of their appropriations and the obstacles facing the latter. Hence, in order to acknowledge this diversity, a "heritage property must be collectively recognised, and collectively maintained" (Melot, 2004). This relates not so much to the (economic) characteristics of the goods, but rather to their (potential and effective) users, under precise social conditions." (Harribey, 2011). Industrial (Del Biondo, Edelblutte, 2016) or viticultural landscapes ... become public goods, or rather collective goods, only when the local and national players' action allows it. The modalities of local governance, through the prism of the territorial context, are at work... So is the 'publicisation' process, in which individual and collective dimensions, private interests and an interest becoming general will meet (Boudes, Darrot, 2016). The quality of this process and the long term, as much as the resulting collective governance, are therefore important.

This process leads to variable results which the notion of 'public goods', and its derivatives, often imperfectly designate. Attempts have been made to go beyond the inherent limits of both this notion (Ballet, 2008) and its economic substrates. Thus, the

concept of Global Public Good (GPG) appeared. The denomination places the goods concerned in an extended territoriality (they are defined as benefiting the whole planet, or at least as being of international interest) and in a temporality which is itself extended (they concern future generations) and therefore, in a globality that is both spatial and temporal.

The properties included in the world heritage of humanity could fall under the category of GPGs. However, “the notion of global public good implicitly assumes that heritage is the property of all.” (Benhamou, 2012). The impossibility to excluding, whether it is effective or political, would underlie the public quality of GPGs even though it is not appropriate for all the properties of humanity’s world heritage. Questions relating to the characteristics (intrinsic or not) of the properties are raised again. Insofar as the notion of GPG is vague and polysemic, its use is debatable (Viévard, 2009). Let us keep in mind that it reinforces the necessity for our approaches to analyse the process for designating heritage elements (of outstanding heritage sites) as public, from the perspective of a plurality of scales and temporalities.

Finally, whereas the notions examined have proximities, they are not assimilable with one another. Among other things, heritage trajectories have specificities that ‘publication’ processes don’t. Their complementarities are essential, with regard to our problems. If only because of their concomitance and their dependency on the particularities of territorial contexts.

Since an outstanding site is made up of various heritage elements, it includes objects with varying degrees of ‘publicity’. Each of these objects and their whole condense, both for building its qualities and defining its management methods, interests arising from various actors. They make their entry in public action differently; the intention of the public authorities with respect to them is itself variable. The collective solution valid at a given time is both fragile and evolving, depending on the power relations.

The concepts of ‘public’, ‘collective’ or ‘common’, once specified, are then useful in that they enable some of the tensions present in and around outstanding heritage sites to be identified. These tensions, inherent in the values and uses at work, in the political decisions of the moment, would have a degree of complexity and acuteness that ‘ordinary’ places do not have, if only because they do not give rise to a particular recognition. How does this complexity, specific to outstanding heritage sites and to the goods within them, reach a form of consistency from the point of view of action mechanisms? How does it find forms of appeasement under the weight of local arrangements?

To understand this complexity and provide elements of response to the questions stated above, in direct connection with the conceptual approach adopted, several complementary systems for observation and analysis were implemented. A first stage involves exploring the diversity at play, through the prism of its dimensions (socio-economic, fiscal and financial, environmental) considered as structuring for the future of the sites and the territories where they are situated.

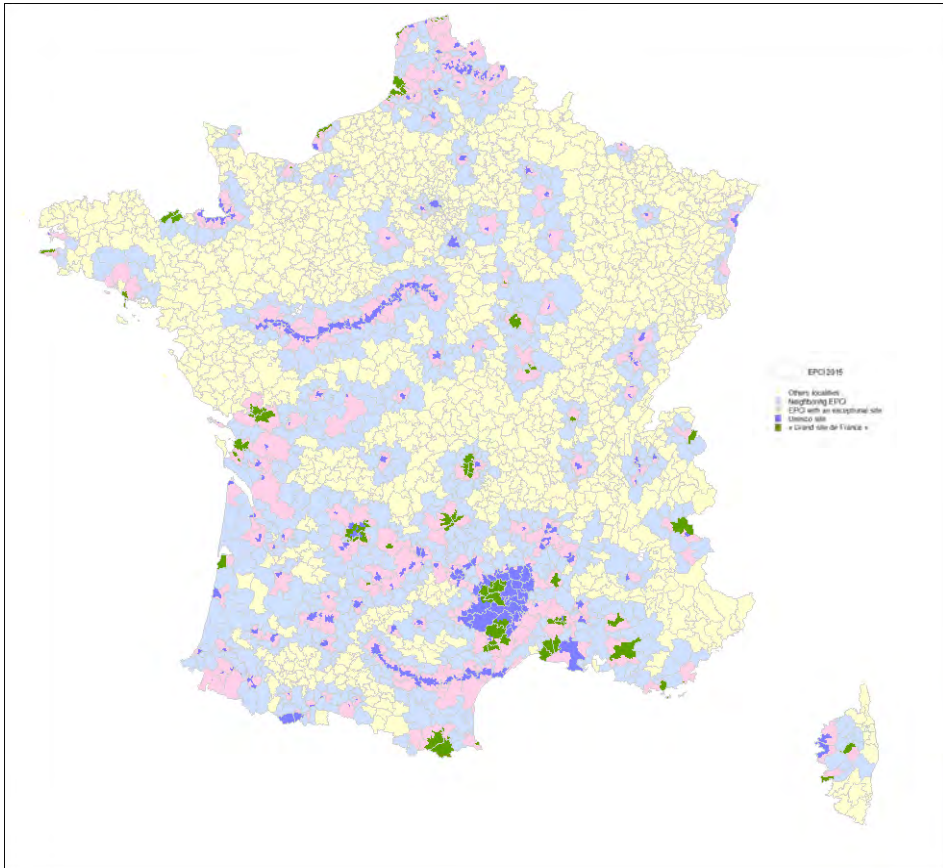
### **Territorial diversity through the prism of typologies**

The problems, issues, and impacts of outstanding heritage sites on territorial development should be differentiated according to the local contexts. The same applies, depending on the assumption adopted, to the possible financial management procedures of those sites, which prompts us to reflect not on a single management model, but on differentiated models. To that end, and prior to the statistical analysis of territorial dynamics, typologies of the sites in their local context were established to better characterise them, and better narrow down the selection of the seven sites for field work.

The typology of the 70 outstanding heritage sites present in mainland France is based on a quantitative socio-economic, fiscal-financial and environmental analysis on different interwoven scales (Map 3).

Map 3: Outstanding heritage sites in their territorial context, scales of analysis

Source: Realisation of the authors



The smallest scale considered is that of the commune(s) possessing the site. The site as a whole is then considered, followed by the public intercommunal cooperation establishments with their own tax system (EPCI) to which the site belongs, as well as the bordering EPCIs. In this way, we can distinguish 5 interwoven scales of analysis:

1. each commune of the outstanding site (UNESCO, RGSF or OGS property)
2. all the communes of the site
3. the EPCI(s) to which the site belongs
4. the bordering EPCIs
5. the rest of the national territory

For the typological analysis, only the first three scales are taken into consideration, whereas for the statistical analysis of territorial dynamics (see below), only the last four are considered. Indeed, the typological exercise firstly aims to identify the various configurations of the sites in an immediate local context. On the other hand, the analysis of the impacts or interactions of these sites on territorial development requires us to extend the focal length to reveal possible territorial spill-over effects on wider scales than the site itself or the EPCI to which it belongs.

The following typological analyses are first based on a socio-economic approach, followed by a fiscal-financial study and then an environmental study.

### **The socio-economic typology**

The first typology is built from socio-economic variables, according to a funnel-like logic, i.e. we first seek to qualify the site's local socio-economic context on the scale of its EPCI, then the site profile itself (communes of the site) and finally to qualify the degree of heterogeneity within the site (differentiation between communes of the same site).

The local socio-economic context is characterised based on the results of a Principal Component Analysis, followed by an Ascending Hierarchical Classification, both built using a database specifying for each EPCI selected, and then at the site level:

- the weight of the various economic bases or drivers (see box);
- the propensity to transform these bases into income for the territorial residents;
- the tourism intensity and seasonality;
- the territorial dynamics of human settlement, employment and income;
- the profile of the resident population.

### THE ECONOMIC BASE THEORY REVISITED

According to the economic base theory, territories have a potential for economic development, or economic base, which consists of all the wealth created and acquired outside the territory. This economic base, if it is spent locally, supplies the domestic or 'presential' sphere which consists of all the activities that are localised to meet the demand of households.

The economic base is broken down into four large families (Davezies, 2008):

- the productive base or economy: income created through the production and export of private goods and services;
- the residential base or economy: pensions, tourist spending, income of commuters (residing in the territory, but not working there);
- the public base: public-service salaries;
- the health and social base: income from transfer and healthcare reimbursement.

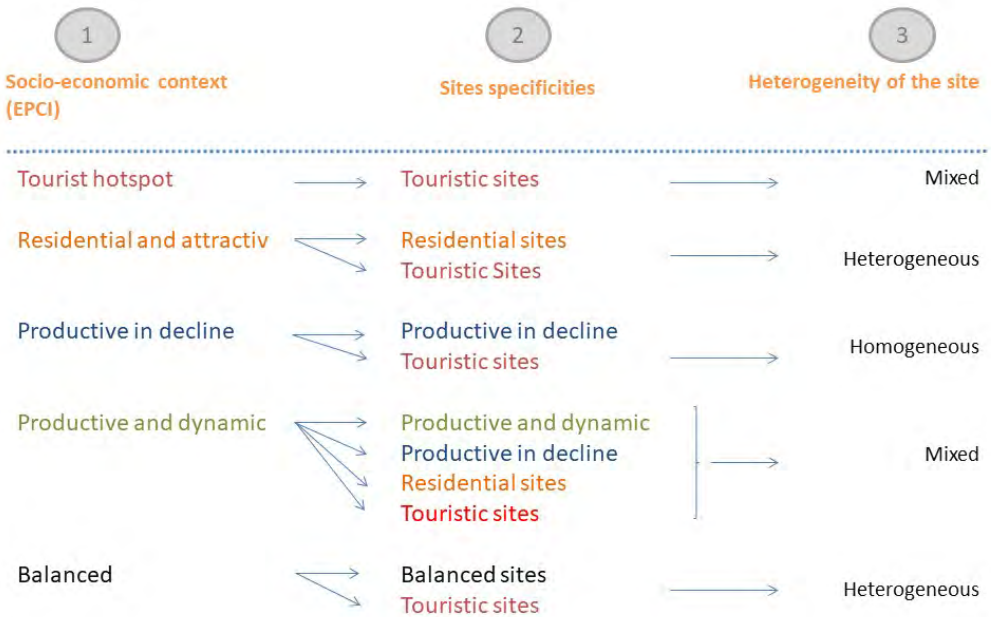
Calculations show that on average in France, the residential economy or base represents more than 40% of the economic bases of employment zones, the productive base - just as the social base - about a quarter, the public base 10% (Talandier, Davezies, 2009). If we accept the idea that these external revenues are the development drivers or potentials for the territories, the residential economy is now the first of them. These basic incomes are a development potential for the territory and one of the key issues of local development is to transform these incomes into demand. Thus, the development of a territory depends on its capacity to capture these income flows as well as to create wealth, but also to ensure their internal circulation.

Our typology first distinguishes the major urban centres, where it seems more difficult to isolate the effects of the classified site on territorial development. Then, upon completion of the analyses, several types of sites and territories appear (Figure 3 and Map 4).

Outstanding heritage sites have differentiated socio-economic dynamics in widely varying local contexts. We distinguish sites attracting large amounts of tourists, located in territories that are also very 'touristic' and whose communal composition can be homogeneous or heterogeneous. In the dynamic and attractive residential territories, two types of sites are differentiated according to their degree of 'touristic nature'; the communal composition is rather heterogeneous. In productive territories in decline, the sites are either also productive and in decline, or 'touristic' despite the local context; the communal composition is rather homogeneous. The most varied types of sites are found in the productive dynamic territories, as all the types of sites are represented. Finally, in economically balanced local contexts, the sites are either balanced or 'touristic'; their communal composition is rather heterogeneous.



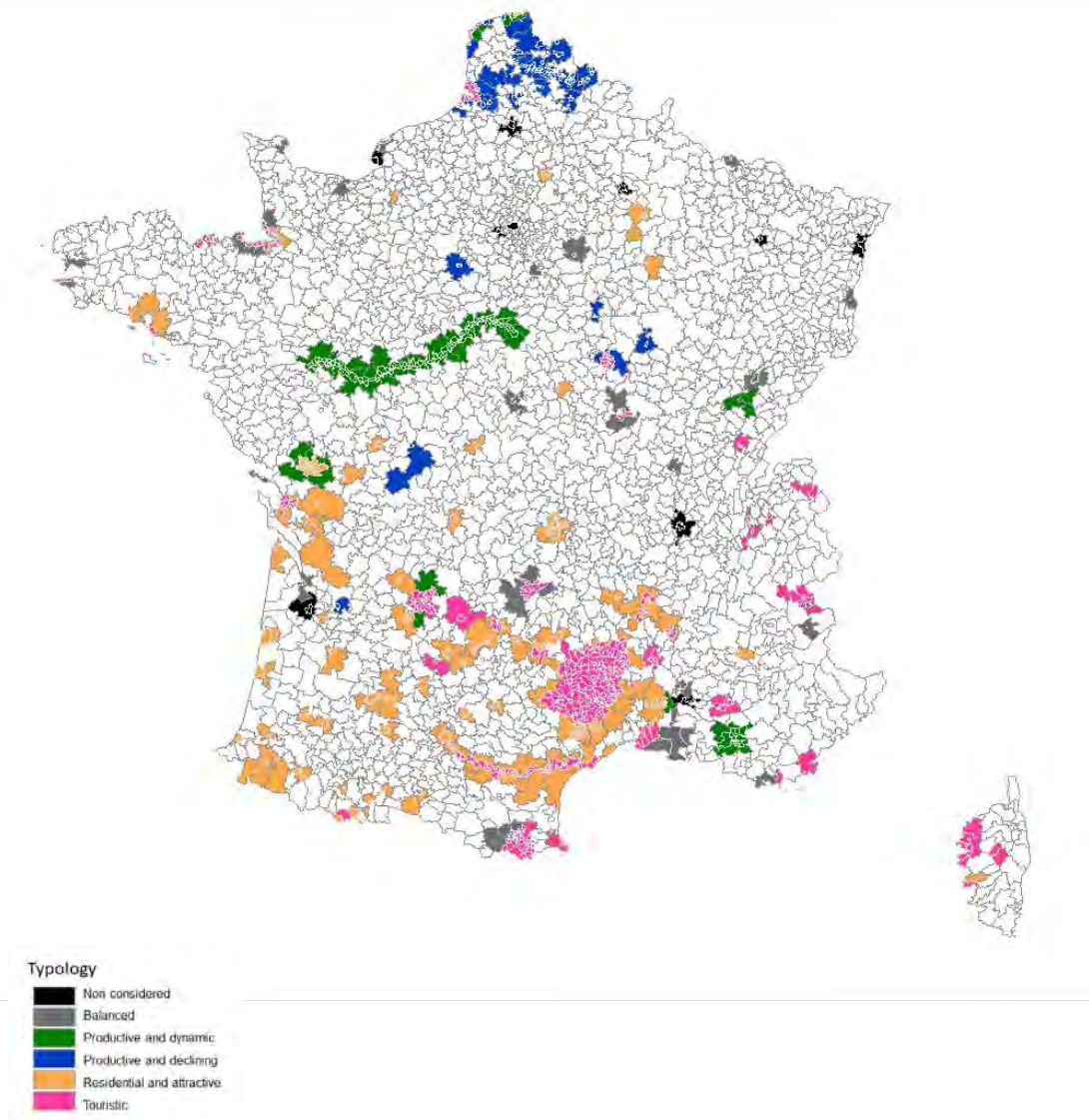
Figure 3: Summary of the socio-economic typologies  
 Source: Drawn up by the authors



The Map shows the concentration, in the North, of productive, industrial EPCIs that are somewhat in decline socio-economically and demographically. This type of territory is also found in a less concentrated way in rural areas of central France. What is on the other hand more interesting to analyse is when tourist sites (such as the Somme Bay for example) are part of these a priori difficult contexts. If the presence of the site is not sufficient to make the territory attractive and dynamic, the question of the role and economic contribution of a tourist place in an area in decline may be raised. The productive, but this time more dynamic territories, are found throughout France. For example, EPCIs of this type are found in the North. Within them, we find tourist or residential sites (the Deux Caps and the Dunes of Flanders) which can contribute to supplying a residential capacity in a rather productive context, and which would be somewhat of a development factor for the territory. Whereas the Marais Poitevin site stands out as being rather residential, it is part of a rather dynamic productive context. There again, there is a need to examine whether or not and how the combination of the two brings a particular dynamic. Within the residential and tourist areas concentrated south of the Loire, outstanding heritage sites appear to further strengthen this type of economy. This also raises questions on the degree of dependency on the tourist sector alone that these cumulative dynamics can sometimes create. Here again, there is a need to examine more precisely the situation of these outstanding heritage sites exposed, like their territory, to strong residential and tourist attractiveness. Finally, a few EPCIs seem more balanced, insofar as productive and residential activities are relatively well represented there. The outstanding heritage sites located in this type of EPCI are either balanced since they are often included in the commune centre (Roman theatre and triumphal arch of Orange, Bourges cathedral...), or popular with tourists (Puy Mary, Pointe du Raz, Mont-Saint-Michel...). The first results show that taking into account the diversity of contexts is a prerequisite to any reflection on the management, the operation, and the role of outstanding heritage sites.

Map 4: Socio-economic typology of the sites in their territorial context

Source: Authors' calculations and elaboration



The analysis continues with the fiscal-financial analysis which this time enables the research and our sites to be contextualised in terms of budget policy and local management.

### **The fiscal-financial typology**

Like the previous one, the fiscal-financial typology is built using a funnel-like logic; the latter is however reversed compared to the one presented.

The basic units, in terms of resource mobilisation and management, are indeed the communes. Hence, we first examine them. In particular, the homogeneity/heterogeneity within the site is tangentially considered not only as a factor likely to influence the governance and management arrangements put in place, but also as an element that may lead to particularities in terms of budget management.

Then, a typology is established for intercommunal groupings<sup>14</sup> hosting outstanding heritage sites. Are they similar or not, and on the basis of which key factors?

The typologies<sup>15</sup> are built from the fiscal and financial indicators available (at a recent date), used to report on:

- the financial wealth of local authorities, implying a more or less significant capacity to dispose of resources for financing their actions and policies. The wealth of a local authority depends on its allocation of tax bases at the local taxation. Thus, differences in wealth illustrate interterritorial differences in situations (i.e. coming from territorial contexts);

<sup>14</sup> The values relating to intercommunal groupings are obtained by aggregation of the values specific to intercommunality (with own-source tax revenue) and those of member communes. Aggregation allows competence and resource sharing between communes, which vary according to the location, to be ignored.

<sup>15</sup> Produced, as in the socio-economic field, from Ascending Hierarchical Classifications, preceded by Principal Component Analyses.

- the actual mobilisation of resources and their uses, reflected by the amount of taxes collected and actual expenditure. Differences in the amounts collected or spent can be attributed to differences in situations and/or in local policies;
- constraints/headroom within local budgets, indicating the presence of rigidities affecting the current and future management (such as those related to debt charges) or on the contrary, auguring the existence of possibilities for action (and for saving and then investing for instance).

Following the analyses conducted for the communes concerned by the presence of the sites (whether they host them or are included in their perimeter), it appears that they are diversely wealthy. It can also be seen that the communes of a same site differ with regard to their revenue, expenditure or budget. Therefore, the presence of an outstanding site is not sufficient to generate homogeneity in the situation and/or local financial policy.

The observations are similar when we consider intercommunal groupings.

Those containing sites, like all those present within the national territory, can be differentiated according to a double gradient: a first one related to the level of local tax wealth, associated with the level of expenditure of the local authorities. A second gradient relates to the importance of the local public investment and saving dynamics, and is therefore associated with current processes, or conversely, the weight of inherited liabilities (previous debts...).

The detailed explorations show that the intercommunal groupings concerned by the sites do not necessarily have the same profile as those that are geographically close to them. This shows that while dynamics and policies (fiscal, spending policies, etc.) take place owing to the presence of outstanding heritage sites and while there are propagation effects, these remain limited.

Intercommunal groupings concerned by the same site (despite their internal and external heterogeneity) are considered as forming the same entity and are subject to a typological analysis.

7 types are identified (Table 1) on the basis of the variables selected and having a differentiating role. These types combine, giving rise to four clearly distinct groups.

A more or less abundant wealth is, depending on the cases, associated with a more or less high level of collected taxes or not. The local authorities can jointly be involved in more or less strong equipment dynamics, or be constrained by charges relating to past policies and limiting their current capacities (to save, borrow, etc.).

Table 1: Composition and profiles of the similarity groups of intercommunal groupings containing outstanding heritage sites

Source: Realisation of the authors

No.	Group		Type	Nb sites	Central objects
1	modesty (wealth/taxes)	equipment dynamics	a	8	The Causses and the Cévennes
		moderate expenditures	b	22	Mont-Saint-Michel and its bay
2	weight of the past	strong wealth	c	3	Abbey of Fontenay
		modesty (wealth/taxes)	d	6	Circus of Navacelles
3	specific case	wealth/equipment	e	1	Le Havre
4	recourse to taxation	marked wealth	f	5	Sainte-Victoire
		average wealth	g	11	Belfries of France

Note: the central object of a class is statistically the most representative of it; it does not necessarily have all the features of the class profile.

A common feature of the first group is that it distinguishes intercommunal groupings with a rather modest tax wealth and collected taxes that are also modest. This modesty does not prevent local authorities of type a from showing significant local public investment dynamics, whereas those of type b do not have the same dynamics and their expenditure is moderate.

The groupings of the second group are marked by the weight of the dynamics or policies in the past years and, in particular, by the recourse to loans at that time. The type c local authorities, nevertheless, have leeway, owing to the abundance of their taxable bases which gives them great wealth. The situation is not so favourable for type d groupings, less endowed in tax bases and in fiscal resources.

The grouping around Le Havre is a specific case (group 3). Its wealth enables it to support significant interventions in terms of expenditure on equipment.

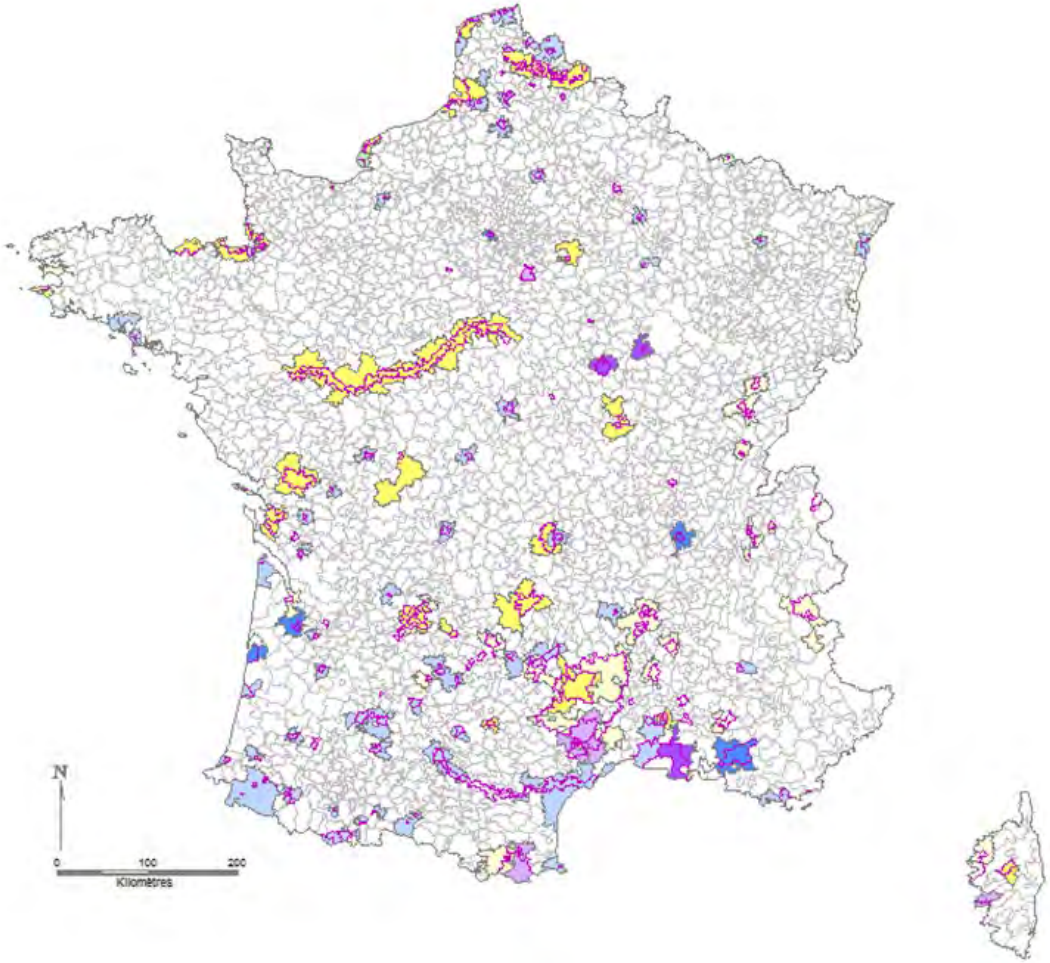
In the local authorities of group 4, tax revenues are higher than elsewhere. This is rather a fact of fiscal wealth for type f local authorities, and a fact of fiscal pressure for type g local authorities (thereby compensating for the modesty of their allocation in taxable bases).

Due to these contrasting configurations, we can already foresee that financial needs related to the maintenance and preservation of the sites, to the developments required to support territorial attractiveness, and so on, cannot be met in a similar manner. All else being equal, where the tax rates are already high, where the charges arising from previous investments are high, the action levers are in all probability limited.

Map 5 provides a representation of the distribution of the sites' intercommunal groupings, according to their membership in the typology.



Map 5: Distribution of the similarity groups, fiscal-financial typology, intercommunal groupings of the sites  
 Source: Realisation of the authors



profiles of the similar groups of intercommunals containing outstanding heritage sites

- 1b - modesty (wealth/taxes)-moderate expenditures) (22 sites)
- 2c - weight of past-strong wealth (3 sites)
- 4g - recourse to taxation-average wealth (11 sites)
- 4f - recourse to taxation-marked wealth (5 sites)
- 2d - weight of the past-modesty (wealth/taxes) (6 sites)
- 1a - modesty (wealth/taxes)-equipment dynamics (8 sites)
- 3 - specific case (wealth/equipment) (1 site)



The cases for which the fiscal wealth and collected taxes are modest (in comparison to national averages) are the most common. They are present in various regions with no spatial proximity (except that of the groupings of the Mining Basin, the Somme Bay; or the Gorges of Tarn and the Cévennes ...). The coastal groupings, those of southern France, which are recognised for their tourist attractiveness, belong to various classes. Most often, whatever their wealth level, the tax revenues are high; this means, taking into account the relations mentioned, that the level of expenditure is also high. The initiatives conducted previously weigh and limit the current possibilities for expenditure in various places (around Arles, the Abbey of Fontenay, Vézelay...).

Dependency or cause-effect relationships between the characteristics of territories in terms of development and their fiscal/financial situation are not easy to identify. Even if their existence is undeniable, these relationships do not function unequivocally and do not act according to the same temporalities (Navarre, Rousseau, 2013). This absence of close dependency is noticeable, concerning outstanding heritage sites and their environment, when we precisely compare the results from the socio-economic typology on the one hand, and those from the fiscal-financial typology on the other hand.

For example, the sites identified as 'touristic', in a context that is itself 'touristic', are indeed mainly modest from the point of view of their potential wealth and that of collected taxes. Nevertheless, some of them currently still have significant equipment dynamics (Gorges of Ardèche, pile dwelling sites around the Alps, Gulf of Porto...) whereas others are more constrained and marked by past equipment efforts (Massif of Canigó). For example, some tourist and residential sites, in a residential environment, have an average potential wealth, while others have a more abundant wealth.

Not all the urban sites, in urban contexts, are similar in fiscal and financial terms.

Financial capacities are modest particularly in the territories identified as productive in decline. Such is the case of the groupings including the Mining Basin, the Deux Caps, the Abbey of St-Savin-sur-Gartempe ... This is also the case for the groupings of the Val de Loire, which is on the contrary a productive site.

Such observations have consequences with regard to the choice of the study areas. Indeed, given the variety of the types, on each of the two dimensions of analysis, also taking into account the absence of real overlapping between the typologies established, it is scarcely conceivable to designate a sample of situations that is totally representative of the overall diversity.

It was therefore decided to retain the socio-economic dimensions as structuring or primary, in accordance with the research problem, and to consider the fiscal and financial dimensions as illustrative and as a second order selection criterion. On the other hand, this information contributes to informing the field work and the preliminary knowledge of the study territories.

The selection of the study areas is the result of an arbitration conducted based on the socio-economic typology, supplemented by fiscal-financial elements. These study areas are representative of a diversity of cases summarised as follows:

- Tourist sites in a territorial context that is also 'touristic' (Ochre Massif and Grotte Chauvet-Gorges of Ardèche); both are similar in fiscal and financial terms: the potential wealth and taxes are modest, the (current) equipment dynamics are clear;
- Tourist site in a residential and dynamic territorial context (Canal du Midi), with a particular fiscal profile: the potential wealth is average, the recourse to taxation is higher than average;
- Residential site in a productive and dynamic territorial context (Marais Poitevin); despite this rather favourable context, the intercommunal groupings of the site are rather characterised by the modesty of both the potential wealth and the taxes actually collected;
- Tourist site in a territorial context that is productive in decline (Somme Bay); the potential fiscal wealth is lower than average, as well as the taxes collected;
- Productive site in decline in a context that is also productive and in decline (Nord-Pas-de-Calais Mining Basin); both the potential wealth and the levels of taxation are lower than average;

- An urban centre (Le Havre) marked by the abundance of potential fiscal wealth and strong current equipment dynamics.

Finally, to complete the characterisation of the study sites, it seems essential to take into account environmental dimensions, insofar as they are likely to imply particular tensions and/or synergies.

### **The environmental typology**

The third typology is as a consequence built from environmental variables, according to a logic that is analogous to the socio-economic typology. It also concerns the 70 sites selected.

In order to establish the environmental profile of the sites, 22 different variables, both qualitative and quantitative, were identified. These variables are organised around 4 categories:

- The regulatory data on the environmental potential<sup>16</sup>

This information relating to the natural zoning (such as biotope order, Natural reserve, Ramsar, and so on) and the presence of natural parks (national/regional) serves to assess the environmental potential of each site, or its endowment in amenities.

- The data on the nature of existing risks and thus, on the environmental vulnerability of the sites<sup>17</sup>

This information also serves to assess the environmental vulnerability of the sites. It concerns natural risks (floods, earthquakes, avalanches, and so on) and anthropic (technological, mining) risks, which can be differentiated according to their frequency of occurrence (frequent/rare). The number of natural disaster orders (since 1983) is also taken into account.

<sup>16</sup> The protection under the Law of 1930 for sites that have been awarded the label Grands Sites de France or the sites under OGS, is not taken into account at this stage. This labelling is the bedrock of the GSF policy. Each of them is then systematically concerned. Introducing this variable in the analysis would have de facto led to a systematic differentiation, compared to the UNESCO properties.

<sup>17</sup> Which form only a part of the overall risks to which outstanding heritage sites can be exposed.

- The landscape data

We used the results of an existing typology<sup>18</sup> identifying 10 landscape classes according to the more or less marked presence of buildings or soil artificialisation, combined with the importance of reliefs, the nature of activities (crops, grasslands, and so on), the presence or absence of coasts, and so on.

- The climate data

This concerns the usual descriptive elements of the climates such as hours of sunshine, wind speed, temperatures and precipitation.

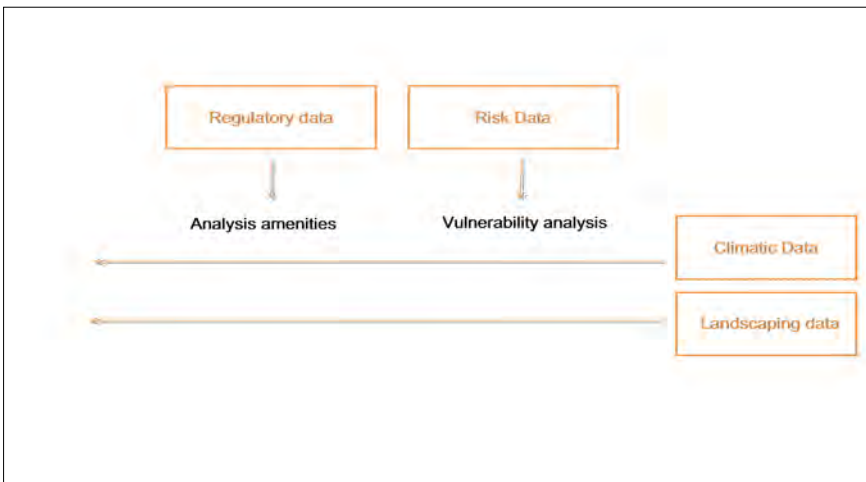
The data is formalised at the communal level. Some variables are available directly on this scale (such as the risk or landscape variables); for others, it is necessary to perform geoprocessing using a GIS to identify the communes concerned by a zoning (typically for the regulatory variables). Finally, some variables must be extrapolated to the communal scale, the initial data being departmental (climate data). The data available on the scale of the commune is aggregated on the scale of the site.

As for the other typologies, the local environmental context is determined from the results of a Principal Component Analysis, performed using the database containing the values of the variables mentioned for each site, followed by an Ascending Hierarchical Classification.

The analysis is performed on the regulatory data block to provide a picture of the environmental potential and amenities of the sites on the one hand, and on the data block relating to risks to identify the environmental vulnerabilities of the sites on the other hand. The climate and landscape data is associated with the results of the analyses obtained thereby (Figure 4).

<sup>18</sup> Achieved by the DATAR, INRA CESAER/UFC, CNRS ThéMA, Cemagref DTMA METAFORT in 2011.

Figure 4: Methodology for the environmental typology  
 Source: Realisation of the authors



From the regulatory point of view, the sites are first differentiated according to the regulations related to the recognition of biodiversity, with a rather sectorial approach (biotope order, Natural Reserve, Ramsar, and so on), then they are organised according to land-use planning policies (regional nature park (PNR)/national nature park (PNN)), in a more transversal approach.

From the point of view of environmental vulnerability, the sites are differentiated mainly by the presence (jointly or not) of anthropic risks, and by the importance of the number of natural disaster orders. The differentiation, therefore, is made according to the presence or absence of natural risks, whether they are rare or frequent.

Table 2: Synthesis of the environmental typology for the study sites selected

Source: Realisation of the authors

NAME OF THE SITE	ENVIRONMENTAL POTENTIALITY CLASS	ENVIRONMENTAL VULNERABILITY CLASS	METEOROLOGICAL CLASS	DOMINANT LANDSCAPE (WEIGHTED BY SURFACE AREA MODE)	NB OF LANDSCAPE TYPES
SOMME BAY	Extended sites concerned by a Natura 2000 area + biotope order	Sites exposed to a very low level of risk	Sites with a climate tending towards oceanic, with moderate sunshine and rainfall	Artificialised landscapes, coasts	4
NORD-PAS-DE-CALAIS MINING BASIN	Sites with little regulation	Sites strongly exposed to anthropic risks (+ frequent natural risks)	Sites with a climate tending towards oceanic, with moderate sunshine and rainfall	Outside the scope (urban units > 10,000 jobs).	3
CANAL DU MIDI	Sites with little regulation	Sites strongly exposed to anthropic risks (+ frequent natural risks)	Sites with a climate tending towards calm Mediterranean, with strong levels of sunshine and low rainfall	Outside the scope (urban units > 10,000 jobs).	7
GROTTE CHAUVET	One-off sites concerned by a Natura 2000 area + biotope order	Sites regularly affected by frequent natural risks	Sites with a climate tending towards calm Mediterranean, with strong levels of sunshine and low rainfall	Mountain, very strong reliefs and semi-natural vegetation	1
LE HAVRE	One-off sites concerned by a Natura 2000 area and few other natural regulations	Sites strongly exposed to anthropic risks (+ frequent natural risks)	Sites with a climate tending towards oceanic, with moderate sunshine and rainfall	Outside the scope (urban units > 10,000 jobs).	1
MARAIS POITEVIN	Extended sites concerned by a Natura 2000 area + biotope order	Sites subject to and affected by a range of risks of all kinds	Sites with a climate tending towards oceanic, with moderate sunshine and rainfall	Crop landscapes, strong presence of buildings	6
OCHRE MASSIF	Sites concerned by a regional nature park (PNR) + Natura 2000	Sites regularly affected by frequent natural risks	Sites with a climate tending towards calm Mediterranean, with strong levels of sunshine and low rainfall	Marked relief, diversified landscapes	5

As shown in Table 2, which synthesises the typological membership of the various study areas, those selected highlight the diversity of environmental situations of the sites in question, both in their potentialities and in their vulnerabilities.

Le Havre appears as a one-off site concerned by a Natura 2000 area and having few natural regulations. The Somme Bay, the Gorges of Ardèche and the Marais Poitevin are extended sites concerned by a Natura 2000 area and by a biotope order. The Grotte Chauvet stands out as a one-off site concerned by a Natura 2000 area and by a biotope order. The Ochre Massif belongs to the class of sites covered by a regional nature park (PNR) and a Natura 2000 area. Finally, the Canal du Midi and the Mining Basin emerge as sites with few environmental regulations.







This diversity is also found in terms of environmental vulnerabilities. Two of the study sites, the Somme Bay and the Gorges of Ardèche, are exposed to a very low level of risks, whether they are of natural or anthropic origin. Three study sites, the Nord-Pas-de-Calais Mining Basin, the Canal du Midi, and Le Havre are strongly exposed to frequent anthropic and natural risks. Two others, the Grotte Chauvet and the Ochre Massif, are sites regularly affected by frequent natural risks. Finally, the Marais Poitevin appears as a site subject to all the anthropic and natural risks, whether they are rare or frequent.

Figure 5 synthesises for each French study area its typological membership. We observe a variety of socio-economic, fiscal-financial and environmental contexts.

The sites were also selected for their morphological diversity (punctual, linear, surface, and so on), their diverse nature (city, rural area, canal, bay, marshland, cave, and so on). The European study areas were not the subject of a detailed statistical typology, but were chosen by analogy, similarity with the French study cases.

Figure 5: Typological synthesis of French study areas  
 Source: Drawn up by the authors

Figure 5 : Typological summary of the French case studies

			Socio-ec
			Site
Baie de Somme	 	Touristic	
Bassin minier Nord-Pas-de-Calais	 	Declining productive capacity	
Canal du Midi	 	Touristic	



TYPOLOGICAL PROFILE			
Economic	Fiscal-financial	Environmental	
Surrounding region		Regulations	Hazards
Declining productive capacity	Modesty (wealth/taxes)	Large site concerned by Natura 2000 + biotope protection	Site exposed to a very low level of risk
Declining productive capacity	Modesty (wealth/taxes)	Site with few environmental regulations	Site highly exposed to anthropogenic risks (+ frequent natural)
Residential	Average wealth/use of the tax	Site with few environmental regulations	Site highly exposed to anthropogenic risks

<p>Grotte Chauvet et Gorges de l'Ardèche</p>		 <p>Réseau des Grands Sites de France</p>	<p>Touristic</p>
<p>Le Havre</p>			<p>Urban</p>
<p>Marais Poitevin</p>		 <p>Réseau des Grands Sites de France</p>	<p>Residential</p>
<p>Massif des Ogres</p>		 <p>Réseau des Grands Sites de France</p>	<p>Touristic</p>

Touristic	Modesty (wealth/taxes) + equipment dynamic	Punctual site concerned by Natura 2000 + biotope protection	Site regularly damaged by frequent natural risks
Urban	Wealth and equipment	Punctual site concerned by Natura 2000 and few other regulations	Site highly exposed to anthropogenic risks (+ frequent natural)
Dynamic productive capacity	Modesty (wealth/taxes)	Large site concerned by Natura 2000 + biotope protection	Site exposed and impacted by a range of risks of all kinds
Touristic	Modesty (wealth/taxes) + equipment dynamic	Site concerned by a Regional Natural Park + Natura 2000	Site regularly damaged by frequent natural risks

## The territorial trajectories

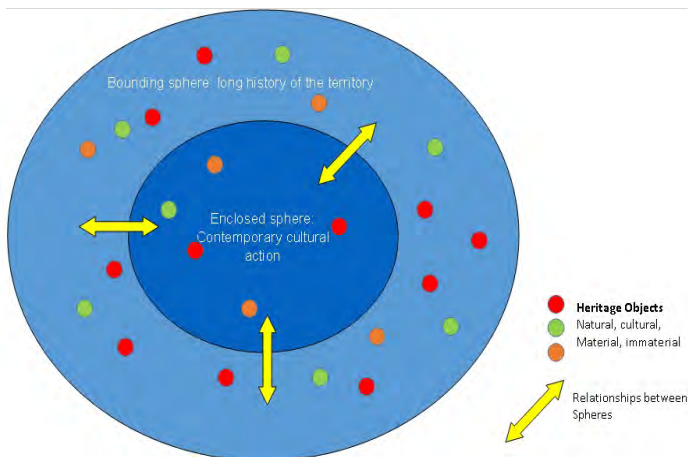
The previous typologies enabled the spatial diversities of today to be characterised, without however shedding light on the long-term heritage trajectories. An analytical framework is used to reveal the links between the long history of the territory and the present-day cultural action (Canova, Landel, 2017). Based on the temporal approach, two forms of culture can be represented as pertaining to two distinct spheres. The first considered as ‘encompassing’ is present in all the territories. It is the result of the long history of their construction, made up of the revelation of their resources, the development of associated activities, crises, disruptions, innovations and emergence of new resources (Landel, Teillet, 2006). For example, the history of the Mining Basin is built around the establishment of a coal monoproduction, which was based on innovations, organisations, disasters, crises, and reconstructions. It enabled the emergence of various kinds of heritage, which are either directly related to the mining activity or may be associated with it: miners’ dwellings, houses of engineers, gardens, pigeon racing, bands, and so on.

The second sphere can be defined as ‘encompassed’. ‘Cultural’ objects, products and attributes mobilised for the project are explicitly at stake. This very broad approach includes all the activities and practices, as well as their forms of expression, their products and their worlds of reference (music, cinema, painting, computer games, etc., as well as entrepreneurship, sport, ecology, politics, etc.). This approach confirms the possibility of defining culture by practices that go far beyond the attributes associated with it. Still in the Mining Basin, a high diversity of present-day activities was identified: recreational and educational activities on the slag heaps, the museum of Lewarde, the film studio of Arenberg, the contemporary music scene of the Métaphone in Oignies, the “Common Culture” National Theatre of Loos en Gohelle, and the Louvre Lens Museum, which form a unique complex of recreational and cultural dissemination places. For each of them, the ties with the history and symbols of the past deserve to be examined.

These two spheres interact with each other and the territory has the capacity to bring them closer, or to superimpose them in a ‘dialogical’ relation in which the two principles are “united without the duality being lost in this unity” (Morin, 1982). Figure 6 illustrates these questions.

The observation of the dynamics of territories possessing outstanding heritage sites led us to propose 4 types of territorial trajectories, resulting from possible interactions between the two spheres.

Figure 6: Interaction between the two spheres of the territorial culture  
Source: Canova, Landel, 2017



*The continuity or the confinement of the encompassed sphere in the encompassing sphere* : this first form favours the maintenance of existing activities, or at least the heritages associated with it. This would be the case of a territory with a strong identity, with cultural practices, one of the essential functions of which would be to maintain and reinforce the social relations existing within the territory. The encompassed sphere of cultural practices remains confined in the encompassing sphere of the territory's long history and limits the possibilities of interaction between them.

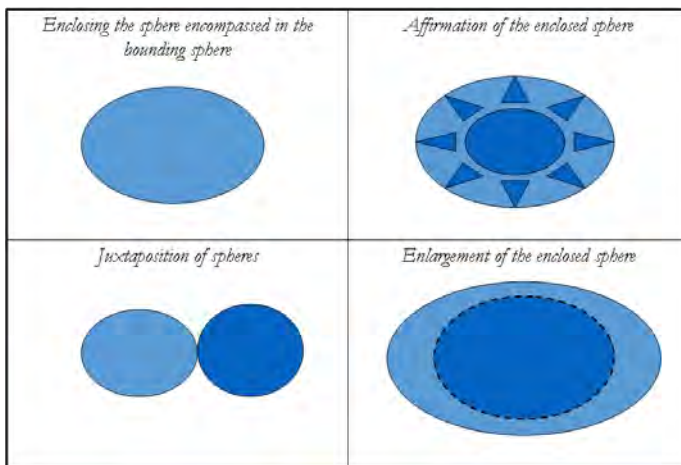
*The disruption or disjunction between the spheres* : this second form of project would be that in which the introduction of new activities, unrelated to the territory's history, would be juxtaposed with the existing heritage, without there being interactions between them. In this case, the encompassing sphere and the encompassed sphere diverge, to allow for new dynamics involving new populations and new actors, and disruptions in cultural practices.

*The bifurcation or assertion of the encompassed sphere*: a third form would be the search for change through the introduction of innovations likely to support the creation of new activities, while maintaining ties with the long history of the territory. The development of a project with the capacity to bring about change in the encompassing sphere, without significantly modifying the territory's trajectory, illustrates this case.

*The convergence between the spheres and the entry in transition*: in this case, the territory experiences a major renewal of its cultural action which remains related to its long history. This movement contributes to a profound renewal of its identity, and facilitates the construction of new forms of governance through the coordination of actors differentiated around new resources. This dynamic reflects the territory's capacity to enter in transition both through a renewal of resources and an innovative capacity in forms of organisation and cooperation, while remaining anchored in the long history of the territory.

These 4 cases of interactions between the territory's long history can be illustrated from Figure 7.

Figure 7: Four typical relations between the two spheres of territorial culture.  
Source: from Canova, Landel, 2017



The outstanding heritage sites can then be analysed using this grid. The trajectory specific to each site or territory allows tension factors, obstacles such as capacities favourable to territorial dynamics, to be identified. Insofar as heritage objects are central, in various ways, for outstanding heritage sites, special attention is paid to observable dynamics for each of the study sites, reconstituted after the field phases. This analysis highlights the multiplicity of possible trajectories.

The parallel cannot always be drawn but, all else being equal, the more extended a site is, the more it includes numerous and diverse heritage objects, the higher the probability for its trajectory to be complex. The continuity is frequently associated with bifurcations, or disruptions. The situations and trajectories may result from governance, economic transformations, specific appropriation modes, and so on, or from the conjunction of various issues. Tensions can be seen since cases of a move towards a real

transition - in which the two spheres under study would converge - are uncommon.

The analysis shows that the most extended sites do indeed have diversified dynamics.

• **The Nord-Pas-de-Calais Mining Basin** makes it possible to represent the 4 forms of trajectories, adding a fifth one which involves destroying traces of the past. It has been considered in some sites, starting with the slag heaps. In the 1980s, a study report destined them to destruction, the extracted materials then being likely to be used for the building of a highway network. The museumification of the Lewarde site, which has become a historical mining centre, illustrates the first trajectory. The second trajectory is that of the juxtaposition between conserved heritage and the creation of new buildings. This is the case with the establishment of the Louvre Lens, in close proximity to a closed pit-head of the mine. It mobilises the national heritage, sometimes presented as the reimbursement of a “debt of the nation to the Mining Basin” and as a driving force for metropolitan dynamics. Through the EuraLens project, which has very strong similarities with the dynamics of EuraLille, ambitions for a change of image are fostered to allow the transition from “the black archipelago to the green archipelago”. The consolidation of bifurcations can be described on the sites of the Métaphone, the contemporary music scene in Oignies and the studios of Wallers Arenberg, where new activities are developing, without transforming the territory’s trajectory. The assumption of transition can be made in Loos en Gohelle, based on the engagement of the heritage of pit 11/19, and many other objects such as the slag heaps, the housing estates (cités), and so on. Based on a constructed narrative, the Mayor, Jean-François Caron, mentioned the undertaking of multiple actions in several directions: culture (National Drama Centre), environment (permanent centre of initiatives for the environment, CPIE), production and energy (écopôle), but also food and agriculture, and housing, through new housing designs.



• **The Ochre Massif** also shows two differentiated trajectories. The first corresponds to the scenario of continuity. It is based on a simple form of exploitation of income gained from tourism at the level of the Roussillon commune. The latter introduced a fee for access to a discovery trail of the massif, requiring only little maintenance and attracting several thousand visitors each year.

The bifurcation trajectory can be illustrated by the development of the social enterprise (Société Coopérative d'Intérêt Collectif, SCIC) Okhra, which is based on the concept of 'economuseology', born in Canada, around the enhancement of the sites: presentation, research, conservation, education, creation workshops, dissemination. In 1993, the members of the SCIC participated with the commune and other partners in the take-over of a former factory, to turn it into an international centre of colour. All the heritage enhancement procedures were mobilised (centre of heritage experimentation (Pôle d'Expérimentation du patrimoine), centre of rural excellence (Pôle d'Excellence Rurale) and today, territorial centre of economic cooperation (Pôle territorial de coopération économique, PTCE)). This PTCE has the capacity to federate the companies, elected officials (community of communes), technicians and services. From the point of view of its managers, the Okhra SCIC could play a central role in the management of the Grand Site. Its ambition is to associate several products of the territory with the ochre: lavender, truffle, stone, and vine. The result would be coloured landscapes where colour concerns all the territory. Through the PTCE, the willingness to propose a new economic model is asserted. Although it is involved through a Public Service Delegation in the management of another site, the community of communes has replaced the Regional Natural Park for the Grand Site project's development, by giving the SCIC OKhra only a reduced place.

• **In the Canal du Midi** three trajectories coexist. Contrary to the assumption of destruction, the first trajectory is in line with the assumption of continuity. It refers to the commercial function flowing from the history of the Canal, currently removed or denied, to give priority only to the tourist function, which freezes the Canal in a heritage conservation posture, without being able to associate other uses with it. Voies Navigables de France (Navigable Waterways of France), as the manager of the Canal,

depository of the buildings and referent for UNESCO, is replanting plane trees by mobilising public and private funds. The financing of green ways and of a cycle path network as well as the rehabilitation of the site of Fonséranes locks in Béziers contribute to this conservation.

The possibility of a bifurcation is part of the process of the new Occitanie region. It is territorial, political and symbolic. It sees the Canal both as a vector of links between the two former regions and as a local development lever. The development of new cultural actions, mobilising digital or innovative technology and citizen initiative, suggests the possibility of renewed mobilisations, whose contours remain to be defined.

• **The Gorges of Ardèche** are marked by two trajectories. The first trajectory, which is 'touristic', refers both to the local history of the place and its dynamisation via the campsite facilities and the presence of the river (bathing and canoe). This dynamic, which is now rentier-based and characterised by continuity, strongly structures the territory both at the economic and cultural levels. The discovery of the Grotte Chauvet opened the way for a possible bifurcation, that of a cultural turn. This ambition, sought by the departmental and regional policies, was consolidated in the reconstitution of the cave. Delegating the management of the Cave's facsimile reconstruction to a private company, however, raises questions on the capacity both to diversify activities and to innovate. It also raises the question of the place of the outstanding heritage site in the building of a network which would accompany a profound mutation of the territory's identity, as well as a transition towards other forms of housing and tourist development and cultural actions.

• **In the Marais Poitevin**, two different but dependent trajectories meet, as well as a third one. The assumption of destruction is present in the drained marshland, resulting from pressures for the reinforcement of a production-oriented agriculture. We are here in a trajectory of disruption between the long history of the marshland and present-day agricultural practices. The second trajectory, restricted to the wet marshland, is based on production and use for tourism. It reflects the posture of continuity, and thus of confinement of present-day activities within a framework strictly inherited from the past.

The aim of the regional nature park (PNR) was to conciliate these two trajectories, but its action, considered defaulting, led the State to temporarily withdraw its classification. Finally, a third trajectory, independent of the two others, tends towards a gradual disappearance of the least accessible and least maintained parts of the marshland. It is consistent with the assumption of abandonment, as one of the possible forms of destruction, while suggesting the possibility of a future restoration for other uses.

• **The Somme Bay** links up two parallel trajectories. The first mobilises the local society which inhabits the place and produces in it. It reflects a trajectory continuity based on the maintenance of ancient practices. The second trajectory, born with its touristic discovery, is part of a heritage dynamic, managed locally and whose aim is to reinforce the first one. The management of the various tourist sites through a joint association (syndicat mixte), the meshing of the territory with green ways, and the enhancement of local production contribute to this aim of soft integration, which suggests the possibility of a bifurcation towards new activities, without these activities being part of a marked transition process.

• **The city of Le Havre** was able to create a bifurcation in its urban trajectory. The rebuilt city, inherited from the destruction, undertook a re-examination of its recent history which aims at promoting its image and its appropriation. Based on local policies and cultural elites, enhanced by its inscription in UNESCO's world heritage, Le Havre is operating a successful cultural transition which is based on the building of a new heritage, and accompanies a change in the territory's trajectory, through a new cultural and tourist attractiveness.

• **The Salada Valley** is also attempting to create a bifurcation in the continuous trajectory of destruction and exodus that it is undergoing. The ambition of this change of course is paradoxically to recreate a continuity with the past activity, by working to renew and give new impetus to the productive dynamics based on the specific qualities of salt. The creation of a foundation, the site's use for tourism and the attempts for UNESCO world heritage site inscription fit into this strategy. The new forms of value-adding to salt, in channels that promote food quality, lead to the emerging transition of the site through a double assertion of its long history and the renewal of the forms of value enhancement.

• **La Chaux-de-Fonds** enables two trajectories to be represented. The first is driven by local watchmaking companies. Marked by a crisis in the 1970s, related to the appearance of digital watches, these companies have since undertaken a qualitative shift towards luxury and very high-end products. They are based on a relatively hidden and closed first-class production. In that, there is a form of disruption between the two spheres, in the sense that the new global watchmaking industry does not demonstrate a clear desire for territorial anchorage. The second trajectory is marked by the desire of municipalities to have the watchmaking town planning recognised. By creating the figure of watchmaking town planning, the application to UNESCO is aimed at promoting this type of urban form internationally. It represents a commitment to enlargement through architectural quality and the attraction of new inhabitants or new activities. These two trajectories are totally interwoven, since they have the same origin, and are not easily articulated, except through museums of companies showing a clear concern for the quality of exhibitions.

• **The Italian Piedmont** was able to align two trajectories. The first, related to vine cultivation, refers to agricultural know-how. It fits in with the assumption of continuity of practices and know-how. After a significant rural exodus, this trajectory benefited from a commitment to developing quality wines, a tourist diversification of agricultural holdings, and a proximity to the second trajectory, which corresponds to a bifurcation without a break with the long history of the territory. It is marked by wine making and commercialisation. It links up manufacturers and sales representatives. A trajectory with a heritage dimension and a more production-oriented trajectory thereby fit together, and strengthen the territory's dynamism.

• **Emscher Park** is still marked by a trajectory that is dependent on the end of mining. Resilience in the face of the disappearance still weighs on territorial dynamics. But the bifurcation initiated by the IBA gives impetus to a divergent and positive trajectory. It aims at creating new uses, among which recreation occupies a remarkable place, and gives rise to new links without bearing the weight of heritage. This new dynamic trajectory seeks and accepts to rebuild itself along the way. Heritage is seen as evolving and transformable.

Beyond the sites investigated in the study, two sites attract attention for analysing the trajectory of the territories associated with them. The **Abbey of Fontenay**<sup>19</sup>, considered today as a practically immutable building, falls in the first category of continuity, or confinement in the encompassed sphere. Resources are mobilised towards the site maintenance and conservation works, as well as associated interpretation mechanisms. Apart from the development of events, through film shooting or receptions, there is no diversification of activities. This has not always been the case. In the 19th century, the site hosted a paper mill, without the pre-existing structures being modified. The site became a major tourist attraction, without having a major impact on Montbard country's territory, which is engaged in a serious deindustrialisation crisis.

This momentum can be observed in other sites, but it will often be confronted with the residential practices associated with it.

Since the costs for renovating ancient buildings are high, these works are rather undertaken by new inhabitants; the financial capacities act as a filter for potential purchasers of the premises.

This situation will be encountered in sites such as Vézelay, Saint-Émilion, or other sites with a high heritage value, where tourist activities (restaurants, hotels, and so on) are being consolidated and are becoming one of the coveted forms of 'high-end' heritage. A first bifurcation can be observed on the site of the **Abbey of Saint-Savin**, where a Public Institution for Cultural Cooperation has the task of enhancing the site, extended to other buildings of the Gartempe valley, renamed valley of the frescoes, through training actions and the development of events.

Once we have set out the characteristics and variety of the study areas, which are the foundation of the qualitative approach and of the understanding of issues relating to outstanding heritage sites, the quantitative approach brings essential complements, qualifying the territorialised development dynamics, as well as the constraints or opportunities, organising the financial management of the sites and the local authorities hosting them.

<sup>19</sup> As a reminder, the Abbey of Fontenay is not part of the areas studied. Nevertheless, given its specific case (private management), the site was visited and a meeting with its managers took place. This case illustrates particularly well the notion of continuity proposed in the analysis grid selected;





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## CHAPTER 2

# **THE SOCIO-ECONOMIC AND FISCAL-FINANCIAL IMPACT OF THE SITES IN THEIR TERRITORY**

Françoise Navarre  
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The theoretical foundations and methodological choices outlined in the previous chapter were decisive in bringing to light the territorial contexts; they are particularly important when dealing with the impact of outstanding heritage sites on territorial development. This new chapter seeks in this sense to explore the link between the development dynamics that can be observed within the territories and the presence of outstanding heritage sites. First, this exploration addresses the socio-economic dimension of development and considers the demographic and economic dynamics of the sites and their territories. Then, the analysis focuses on the existence or otherwise of common specificities at the fiscal and financial level between the outstanding heritage sites and the territories to which they belong.

### **The impact of outstanding heritage sites on local socio-economic dynamics**

The study sites are recognised for their heritage and landscape outstandingness and are, as such, likely to foster the tourist attractiveness and economic dynamism of the territories in which they are situated. How exactly do things stand? How does this attractiveness benefit or not benefit other territories located in close proximity? Do outstanding heritage sites have specific dynamics in terms of tourism, employment, income, and demography?

The typologies showed that the sites had characteristics that were sometimes very different from those of their close environment. Thus, sites that are productive, residential, touristic, dynamic or in decline can coexist within and outside the site. We can make the assumption that the impacts on local development differ according to the context. The site can, for example, be only a further asset in a territory that is already touristic or be thought of as a major lever of economic reconversion in territories affected by deindustrialisation. The quantitative approach developed here takes these differences into account and seeks to analyse the territorial consequences of these combinations and these local particularities in terms of socio-economic and demographic dynamics.

The quantitative analyses conducted on the scale of the 70 French sites showed that these areas were overall rather dynamic from the demographic and socio-economic point of view, in territorial contexts that were also dynamic (Tables 3,4 a,d 5)

Table 3: Territorial dynamics of outstanding sites and their territories  
Source: From Insee and DGI, calculations of the authors

Zoning	Density 2013	Trend Pop 2008/2013, %	Contrib NB 2008/2013, %	Contrib MB 2008/2013, %	Trend Employment 2008/2013, %	Per capita income 2013	Trend Per capita income 2008/2013, %	TCC 2013 for 1000 inhab.	TCC trend 2008/2013, %
Grands sites de France	105	1.0	0.3	0.7	2.6	15265	21.2	853.9	-0.4
UNESCO sites	529	1.0	2.7	-1.7	0.3	17578	14.3	241.0	13.8
EPCI of the site	143	3.0	1.8	1.2	2.2	14932	18.1	300.9	-3.0
bordering EPCIs	94	3.1	1.9	1.3	1.8	15223	18.0	338.4	-2.1
Other metropolitan communes	103	2.5	2.1	0.4	-0.2	14903	17.5	281.8	-1.5
<b>Total mainland France</b>	<b>117</b>	<b>2.5</b>	<b>2.0</b>	<b>0.5</b>	<b>0.7</b>	<b>15326</b>	<b>17.3</b>	<b>302.3</b>	<b>-0.5</b>

Note to the reader:

Contrib NB 2008/2013, %: population variation due to the natural balance between 2008 and 2013, %

Contrib MB 2008/2013, %: population variation due to the migratory balance between 2008 and 2013, %

TCC: tourism carrying capacity (see definition section 1.)

Contrib MB 2008/2013, %: population variation due to the migratory balance between 2008 and 2013, %

Table 4: Distribution of private salaried employment in 2014 by sphere, in %  
Source: From Accoss, calculations of the authors

Economic sphere	Grands sites de France	UNESCO sites	EPCI of the site	bordering EPCIs	Other communes communes	Total mainland France
Export	15.4	13.7	20.5	21.3	23.7	20.6
Intermediation	36.3	39.5	35.8	35.5	33.6	35.6
Consumption	48.3	46.7	43.7	43.3	42.7	43.9
<i>including localised consumption</i>	35.9	34.8	30.5	29.6	29.5	30.8
<i>including diffuse consumption</i>	12.4	12.0	13.2	13.7	13.2	13.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Table 5: Variation of private salaried employment between 2007 and 2014 by sphere, in %  
Source: From Accoss, calculations of the authors

Economic sphere	Grands sites de France	UNESCO sites	EPCI of the site	bordering EPCIs	Other metropolitan communes	Total mainland France.
Export	-11.0	-7.4	-8.5	-9.6	-12.1	-10.4
Intermediation	7.8	-7.2	0.3	1.2	-3.3	-2.6
Consumption	2.1	0.4	2.8	2.8	1.6	1.7
<i>including localised consumption</i>	3.2	4.4	4.8	5.6	3.9	4.5
<i>including diffuse consumption</i>	-0.8	-9.8	-1.7	-2.8	-3.2	-4.1
TOTAL	1.8	-3.9	-0.6	-0.7	-3.6	-2.5

We observe that these territorial groupings made up of a site and its periphery evolve in a rather similar way, with, in particular, a presence of tourist activities and, more broadly, an economic structure that is presential or oriented towards the consumption activities of resident households or tourists, which enable them to absorb the shocks of the economic crisis of 2008 (Table 4). We note that activities geared towards household consumption represent 48% of the local employment in the communes of outstanding sites, for a national average of less than 43%. We observe a ‘tourist-residential’ specialisation of the sites, which however does not hinder in any way the growth of more productive jobs, particularly in the sphere of corporate services, qualified as intermediation sphere (Table 5).

But beyond these general lessons, the typological approaches have already revealed the marked socio-economic differences from one context to another. These different heritage-spatial configurations depict three major types of relationships of the site with its territory. Thus, we distinguish cases where:

- the outstanding site is a territorial resource among others;
- the outstanding site is a resource which is not very or not activated by the territory;
- the outstanding site appears as a possible development lever for territories.

### **A territorial resource among others**

The first lessons to be drawn from the quantitative analyses come from cases where the outstanding heritage sites participate in the overall dynamics of the territory. In this case, the site is indeed a resource, but a resource among others. This is for example the case of sites located in:

- urban centres (Le Havre among the study areas; cities such as Lyon, Paris, Avignon, Nancy, and so on, are also taken into consideration);
- or tourist or residential sites located in tourist or residential contexts (the Ochre Massif, the Canal du Midi among the areas selected, but also major places of French tourism

such as Cap Fréhel in Brittany, the Gulf of Porto in Corsica, the Dune of Pilat, the city of Carcassonne, and so on);

- heritage sites that are still productive and, more importantly, socio-economically dynamic, located in a territorial context of the same nature (the Marais Poitevin among the study areas, or the Val de Loire, for example).

**Table 6: The population, employment, income and tourism carrying capacity of the areas for which the site is a resource among others**

*Source: From Insee and DGI, calculations of the authors*

The site = a resource among others	Density 2013	Trend Pop 2008/2013, %	Contrib NB 2008/2013, %	Contrib MB 2008/2013, %	Trend Employment 2008/2013, %	Per capita income 2013	Per capita income 2008	Trend Per capita income 2008/2013, %	TCC 2013 for 1000 inhab.	TCC 2008 for 1000 inhab.	TCC trend 2008/2013, %
Total	177	3.0	2.5	0.6	2.0	16744	14380	16.4	347.3	346.1	0.4
Grands sites de France	108	1.3	0.5	0.8	3.2	15226	12512	21.7	780.0	785.9	-0.7
UNESCO	523	1.3	3.0	-1.7	0.6	19782	17411	13.6	289.1	255.6	13.1
EPCI of the sites	158	3.9	2.0	1.9	2.5	15403	13073	17.8	387.9	405.0	-4.2
bordering EPCIs	142	3.7	2.6	1.1	2.9	15893	13505	17.7	325.2	332.1	-2.1

In these areas, the whole territory is attractive. The population is increasing, most often due to the cumulative effect of a positive natural and migratory balance. The case of the UNESCO sites for which the migratory balance is negative somewhat characterises urban centres, whose land saturation can partly explain this result. These territories see the per capita income increase, which generates new jobs, particularly in the sectors of retail, person-to-person services, tourism, and business services (Table 6).

But several types of tensions and questions for public action emerge from these ‘heritage-territorial’ configurations which are favourable on the surface. They relate to an economic hyper-specialisation, to risks of over-exploitation of the resource which is the site, to a fragmentation or even an exclusion of some uses or functions and therefore also, of some populations.

First, there is a risk of economic hyper-specialisation in the tourism sector. Indeed, there are sites attracting large amounts of tourists located in territories which are also very touristic outside of the site itself. The site is a tourist resource among others. The tourism carrying capacity<sup>20</sup> is indeed much higher in the sites, but it also remains well above the French average in the neighbouring territories. Tourism-related employment increases both within and outside the site; it is often the main lever for local economic development. This is the case for example in the Gorges of Ardèche or in the communes located near the Grotte Chauvet. Thus, we must recognise the importance of this sector in the rural renewal experienced by some of these areas.

But in this 'tourism-touristic' configuration, the territory's dependence on one economic sector (tourism) poses a problem.

Indeed, it appears that extremely touristic areas (such as ski resorts or seaside resorts) today show a few signs of weakness, for example in terms of social inequalities, negative migratory balances, and pressure on natural areas (Talandier, 2007; 2016). We also observe in some cases a risk of saturation of the natural environment, of the site, and of the clientele faced with areas visited by too many people.

In these territories, the issue of reception and hospitality poses a dilemma for the residents and stakeholders. The site and its residents should be protected, but the site should be widely open at the same time, insofar as the local economy, for example in South Ardèche, depends heavily on the spending of passers-by. Likewise, tourist pressure in the Ochre Massif (up to 450,000 visitors per year), concentrated in July and August in particular places, generates a strong degradation of the environment due to trampling and - until the 2000s - a significant removal of the ochre by the visitors. This endangering of the site led the territorial actors, at the end of the 2000s, to engage in a Grand Site Operation to manage tourist flows. This management problem is expressed everywhere by the desire to extend seasonality.

20 As a reminder, the number of tourists that can be welcomed / number of inhabitants of the territory.



The absence of economic diversification, finally built around largely similar resources, creates a high degree of dependence on the landscape, a fragile and ambiguous resource insofar as multiple private properties compose this landscape. But there is also a risk of fragility for the local economic system as a whole. On the one hand, this business line is not as protected and sustainable as it seems. The destinations are largely subject to international competition; the recent events in France related to terrorist acts have also shown the rapid elasticity of demand in the event of a shock and in this particular instance, the drop in the number of international tourists.

Furthermore, regulations are multiplying to regulate the various uses and can foster the development of certain activities, in particular the most lucrative ones, to the detriment of others, which are sent to the periphery. In terms of fiscal-financial reasoning, the same logic is reflected with a high expenditure level that the favourable situation allows in terms of wealth, but with a risk that it will have an impact on investments (what has been created in the past generates rigidities and impedes the possibilities for the future) and especially those required for the site. So there is a risk that this hyper-specialisation will strengthen since it is a gathering economy which is easier to maintain than to change.

Finally, one can imagine that in this context, the site is not the priority of local public policies. For example, near the Canal du Midi, tourism is active without the need to particularly enhance the Canal and its amenities. Hence, it receives less attention and fewer resources in some communes, with, however, the safeguards associated with compliance with the requirements of the inscription and its maintenance. What is part of the site is not really structuring in terms of action. This observation is not radically different in territorial contexts that are more disadvantaged, for example in the Somme Bay where, since territorial resources are rare, one seeks to rely on all those available.

Secondly, the question arises as to the socio-spatial gentrification of the site. Indeed, we observe, in socio-economically dynamic and tourist-residential sites and territorial contexts, a form of residential competition between the attractive site which is accessible to certain households and the peripheral areas of the site which host mainly households with children, as well as those with modest incomes. The land and real estate pressure in these territories in general, and in the communes of the site in particular, can generate deterrent effects for working people and young households, which poses problems in a second stage for local life (schools, shops, services, and so on) and for the organisation of asset mobility.

In these configurations, the residential pressure can even be an impediment to tourist dynamics. In some cases, the tourism carrying capacity can rapidly decrease through the transformation, for example, of second residences into primary residences. But there is especially a conflict of land-use and function, between a tourist site to be preserved and a territory which has to face the rapid growth of both its population and its economic activities. Tourism is not necessarily the first source of income or the first economic lever of these areas. Thus, the site is a tourist resource, but only one among others. The risk here arises from a split and an incomprehension of the local population and actors, between a dynamic driven by the site which captures the income gained from tourism and the rest of the territory which is developing by means of other drivers.

Taxation can also accentuate a residential development strategy since the rental value, or tax base, of a second residence is close to €2400, whereas that of a primary residence reaches a little more than €3000. Nevertheless, according to the location, the unit values (in €/m<sup>2</sup>) of one or the other are very different, according to the dwelling's tax category, which is representative of its comfort; hence, the realities are not as clear-cut. In fact, the positive impact of the rental values of residential premises on the local tax wealth is observed in the communes of these sites or in the vicinity, not due as much to the site itself, as to urban sprawl, centrality, proximity to the coastline, and so on. Conversely, in sites that are less subject to residential pressure, we observe unfavourable rental values explained by a depreciated housing stock due to some inertia in its change.

In this configuration, we also note that tourism development is mainly driven by the site itself and finally does not spread much to neighbouring territories. This observation (Canal du Midi, Ochre Massif) or concern (in the case of the Grotte Chauvet and the facsimile reconstruction (espace de restitution) for example, for which local benefits remain undetermined for the time being) can create conflict situations. Indeed, the result can be a fragmentation of interests and actors who do not share the same vision, the same story around the site which has difficulty uniting people. Thus, the Canal du Midi is experiencing a real crisis (plane disease, cost of uprooting and replanting, damage to the banks, land-use conflict with farmers, siltation of the Canal, management and coordination difficulties, and so on) which now presents a risk of the site being delisted by UNESCO. But it is also in these paroxysmic situations that the actors react. The Canal du Midi now has a Property Committee. A co-building process (workshops focussing on major issues...) and partnership working (representatives of the State, of the Region, associations and actors of the economic world, and so on) have enabled the establishment of a Charter (architectural, urban, landscape) which will define the main common guidelines chosen.

In these territories, the need to reactivate the site in its economic functions other than tourism clearly appeared in the field surveys, including to promote the maintenance of the site itself (for example by restarting the exploitation of the ochre quarries or by reinstating the role of the Canal du Midi as a freight transport route, which would make it possible to fight against its siltation by the passage of adapted barges - which a river cruise boat does not allow).

In these territories, even more than elsewhere, the feeling that the capture of the site-related income gained from tourism would benefit only a limited number of actors and communes may block the partnership and consultation process for the site's management. For example, the revenues of the Ochre Trail are communal, but the expenses remain intercommunal. It is therefore necessary to rebuild relationships around the 'site' issue, which is thought of as common goods enabling projects for the development and enhancement of a common resource to be promoted. For example, in the

Ochre Massif in Provence, the Okhra company appeared in the mid 1990s as a lateral actor, first in the form of an association, and then of a cooperative (SCIC). Today, Okhra brings together 200 members, individuals or institutions, with the aim of disseminating know-how in the area of colour. Supported by the regional nature park (PNR), the SCIC Okhra has become a central player, which shows a federative capacity around economic activities and activities of general interest (visits, training, conservation, research).

More broadly, as expressed by one of the managers surveyed, it would be desirable to rethink the site's management plan by integrating a real economic development strategy for the territory. Experiments conducted abroad, for example that of the Fundación Valle Salado (Spain), illustrate how cooperation can be locally established, for the sake of the site and the territory. Thus, the Valle Salado de Añana is an original governance model, driven by the Fundación Valle Salado to which the salt workers have assigned their property rights. The Foundation's roadmap is centred around three objectives: restoring and conserving the culture, both material and environmental, of the landscape to guarantee its sustainability, developing cultural initiatives (open to the public), as well as producing quality salts using traditional, ecological techniques which respect the ancient know-how of salt workers.

Considering the diversification of the site's economic functions may involve setting up innovative experiments and participative approaches to consider other uses and other enhancement and appropriation levers for outstanding heritage sites. Creative workshops held on the case of the Canal du Midi, for example, revealed the potential that the presence of a waterway offers, as a genuine link between the two ex-regions of Occitanie: travelling knowledge centre; mobile medical practice; floating production greenhouses; floating market; guinguettes; manufacturing and repair workshop, and so on. (see Part 2).

Finally, some sites are located in dynamic territories, without their economic base being dominated by the residential or tourist economy. These are moderately touristic sites located in rather productive and socio-economically dynamic areas. In these cases, the site makes it possible to expand the range of the territory's development drivers by introducing tourism levers in a productive territory. In these configurations, the question raised by the field actors is related to the possible oppositions and land-use conflicts between the growth or maintenance of productive economic activities and the preservation of environmental or landscape qualities that are favourable for the more touristic and residential activities. Conflicts, for example around extensive/intensive agriculture emerge in a sporadic but recurrent way, revealing the difficult conciliation of diverse logics that are sometimes antagonistic. The Marais Poitevin is a textbook case, with the contemporary landscape of the wet marshland – which has been awarded the Grand Site de France label – the product of the developments carried out in the 19th century, and a drained marshland where a modern and intensive agriculture has developed. As a result, the Marais Poitevin Regional Nature Park lost its label for about ten years, owing to a significant reduction of wetland areas, reflecting an incapacity to locally contain the contradictions of national policies (intensive maize cultivation versus environmental protection) and the resulting tensions (farmers versus environmental associations).

Today, the maintenance of contemporary activities within a framework strictly inherited from the past appears as a vector of confinement. A similar disjunction appears in other cases, that of the Canal du Midi, for instance. The landscape then appears as a necessary recourse to build a uniting discourse. It becomes an object of mediation where its material and symbolic significance is discussed by actors who are traditionally opposed (see Part 2).

There again, the tax rules, this time on economic activities, can accentuate these mechanisms of separation of interests. Thus, the corporate value added contributions are, in €/job, practically indifferent as to the type of employment and territory. On the other hand, that is not true for the corporate real property taxes which increase according to the square metres of land occupied. The productive model will therefore have an impact on the taxation model through the ground surface area rather than through the nature of the activity (type of jobs) or its dynamics (added value). Furthermore, the regulations to protect outstanding heritage sites can contribute to limiting the establishment of activities that would be fiscally lucrative, for the benefit of the less regulated bordering EPCs. Hence, a certain momentum with respect to ‘support’ jobs (logistics, day-to-day corporate services, and so on) was observed in the site’s neighbouring inter-communalities. The question arises as to the cooperation between territories, not only those of the site but also those located in proximity, to plan and support this sharing of functions, as well as the costs and benefits related to the presence of the site. To go further, we could imagine conducting an exploratory work to test with private actors possible modalities for cooperation between the communes involved, the syndicate or the management structure of the site and the surrounding EPCs, in order to test the feasibility of a form of ‘reciprocity contract’ or ‘innovation pact’, in the image of those recently conceived in France to create links between large cities and their hinterland.

If the site as a resource of the territory among others raises questions regarding public action in terms of economic specialisation, tourist pressure, residential gentrification, territorial multifunctionality, ‘productive-tourist’ and environmental land-use conflicts, coordination of actions, and so on, it remains an asset to be regulated in all the cases mentioned. The following case is very different, since this time the site is not (or no longer) an activated resource.

## A resource needing activation

The situation here is very different from the previous one. We are dealing with sites described as rather balanced, or even touristic, located in balanced territories. But this socio-economic balance masks in reality a situation of stagnation or weak dynamism. Finally, in these heritage-territorial configurations, neither the territory nor the site seem to be going well. This is particularly the case of sites located in small or medium-sized towns which in France are currently undergoing a strategic positioning deficit, whether in terms of economy, image, culture, and so on, like Amiens, Troyes, Orange and others.

We observe, in the communes of the site or in the vicinity, a decline or stagnation of the population owing to negative migratory balances, or sometimes also negative natural balances. The fall in employment marks in the same way the different areas of this type. The per capita income increases but remains more moderate than in the preceding territories. Finally, we note a declining tourism potential, reflecting a lack of tourist interest or a lack of action to support the attractiveness of the sites and their surrounding territories (Table 7).

Table 7: Population, employment, incomes and tourism carrying capacity of areas for which the site remains a resource to be activated  
Source: From Insee and DGI, calculations of the authors

The site = a resource to be activated	Density 2013	Trend Pop 2008/2013, %	Contrib NB 2008/2013, %	Contrib MB 2008/2013, %	Trend Employment 2008/2013, %	Per capita income 2013	Per capita income 2008	Trend Per capita income 2008/2013, %	TCC 2013 for 1000 inhab.	TCC 2008 for 1000 inhab.	TCC trend 2008/2013, %
Total	104	1.4	0.9	0.4	-0.8	14836	12483	18.8	352.4	354.7	-0.7
Grands sites de France	117	0.7	-0.5	1.2	-1.5	15649	13203	18.5	805.5	821.8	-2.0
UNESCO	165	-1.2	0.7	-2.0	-2.1	14642	12343	18.6	350.9	331.1	6.0
EPCI of the sites	182	0.3	0.8	-0.4	-0.6	14865	12515	18.8	322.7	324.0	-0.4
bordering EPCIs	74	2.7	1.2	1.5	-0.6	14777	12421	19.0	338.3	344.0	-1.6

Furthermore, these areas, like most French territories, are showing a decline in export activities, which is this time not offset by the growth of corporate services, or other support activities (logistics, flow management, small local industries, craftsmanship, and so on) or consumption activities. In this context, the territory does not seem to be in turn capable of making itself a resource for the outstanding heritage site. In these insufficiently dynamic localities, the presence of a site, as outstanding as it may be, does not make it possible to regain an economic positioning. As in-between towns, they must face the competition of large cities on the one hand, and more touristic and residential rural areas on the other hand. Although we notice in some cases a slight 'site' effect, for example in terms of tourism employment, it absolutely fails to involve the rest of the territory or other economic sectors.

It has to be recognised that there is no 'outstanding heritage sites' miracle. If the territory does not benefit from a minimum commitment, dynamic, strategy, and so on, the mere presence of an outstanding site cannot foster its development. The site can be a resource for the local level, but only if the territory can in turn guarantee a minimum of resources and dynamism for the site. The problem goes well beyond that of this publication, insofar as it questions the role and the place of medium-sized towns within metropolised territorial systems. The issue of the town centres which are dying off, that of the inter-metropolitan competition affecting them, has an indirect impact on the number of visitors and attractiveness of outstanding heritage sites. According to the cases, the presence of the site could enable the town to reconstruct an image, a story, to remobilise the actors around a territory project, like the project for rehabilitating the site of the nine locks of Fontseranes along the Canal du Midi. Yet in most of these towns, this momentum is still not there. The risk is then for the site to become and/or be regarded as a centre of cost, as an economic drain, and what is more, a source of tensions, rather than a resource or a development lever, in the image of what emerges in the third scenario developed.





Cap Gris-Nez, © MTES/MCT, Terra

## A possible territorial development lever

Whereas there is no miracle related to the mere presence of the site as shown by the cases examined above, some favourable signs are observed and must be stated. This is in particular the case of outstanding heritage sites located in productive territories in decline. These cases include the Somme Bay, the Deux Caps Blanc-Nez, Gris-Nez, the Nord-Pas-de-Calais Mining Basin, for example. These territories are those of deindustrialisation; they are the victims or, let us say, the losers of globalisation and metropolisation at present. Although the presence of an outstanding site does not overall reverse this trend and by itself cannot resolve all the problems, positive signs can be identified.

Table 8: Population, employment, incomes and tourism carrying capacity of areas for which the site is a development lever  
Source: Calculations and elaboration of the authors

The site = a lever of territorial development	Density 2013	Trend Pop 2008/2013, %	Contrib NB 2008/2013, %	Contrib MB 2008/2013, %	Trend Employment 2008/2013, %	Per capita income 2013	Per capita income 2008	Trend Per capita income 2008/2013, %	TCC 2013 for 1000 inhab.	TCC 2008 for 1000 inhab.	TCC trend 2008/2013, %
Total	136	1.0	2.0	-1.1	-0.6	12982	11014	17.9	147.0	147.1	-0.1
Grands sites de France	68	-2.9	-1.2	-1.7	-0.2	14327	11797	21.4	2283.1	2165.2	5.4
UNESCO	1206	-0.6	2.6	-3.3	-1.7	11354	9825	15.6	46.9	35.7	31.1
EPCL of the sites	217	1.6	2.5	-0.9	0.8	13456	11397	18.1	69.4	69.0	0.6
bordering EPCLs	63	1.4	1.0	0.4	-1.3	13518	11380	18.8	267.4	279.0	-4.2

These areas remain marked by weak economic performances, a stagnation or a decrease of the population owing to negative migratory balances. Nevertheless, when we observe in more detail the dynamics of tourist sites located in those territories, we notice an increase in their tourist attractiveness measured in carrying capacity or in employment “despite the context”. Furthermore, these effects extend to the rest of the communes of the intercommunality in which they are located. In the case of the sites that would still be in the image of their territory, i.e. productive and in decline, we observe a slight, but non-null use for tourism. The tourism carrying capacity increases and especially, the increase in tourism-related employment, in jobs related to trade, services to the public, and in the field of culture, both within the site and in the surroundings, contributes to rebalancing the economic bases of these areas. These signs of ‘tourist-presential’ recovery, along with a growth of corporate service activities and other support functions in intercommunalities outside the site, give us a glimpse of a piece of blue sky in these former industrial territories where unemployment and poverty remain the predominant social markers. The qualitative surveys in these territories revealed the willingness on the part of local actors to coordinate efforts in order to reverse the dynamics which have remained depressive for decades.

Here, the image reversal is central, in particular for the site’s inhabitants who rediscover their territory and their history in a different way. The site becomes the bearer of a new uniting, rewarding identity which is a vector of attractiveness for visitors. The aim is to build local capital (nature in the Somme Bay), to depart from previous production methods while capitalising on what they represented (Mining Basin) or in the case of Le Havre, to enhance an original architecture which is a trace of the past. In Le Havre, the heritage process was from the onset based on an urban project logic. The city has been able to create a bifurcation in its urban trajectory by moving from a rebuilt city that was not well-lived and denigrated, to an architecturally remarkable city. The issue is an identity and cultural one, but also an economic one. There is a clear intention to engage in global dynamics while enhancing and showing consideration for the local economies and specificities.

The Nord-Pas-de-Calais Mining Basin is listed in UNESCO's world heritage as a "changing, living cultural landscape". This inscription in a context of economic crisis raises questions about the mobilisation of heritage in an economic and territorial transition project. Here, the ambition is double with, on the one hand, the mobilisation of a piece of national heritage to serve a metropolitan dynamic (Louvre-Lens and Euralens project) and a local ecological transition trajectory, in the image of Loos en Gohelle, for making the change from "the black archipelago" to "the green archipelago".

Inherited from the modernity and the history of the last few centuries, Le Havre and the Mining Basin share their hope for a local re-interest. Le Havre benefited from an elitist re-reading of the city which finally re-instilled a sense of pride in living there. In a similar way, in the Mining Basin, the denial of the past identity and the willingness to raze everything are gradually giving way to a reconquest of history. In both cases, internal and external mediation is essential and the initiators' voluntarism plays a significant role.

In these contexts, tourism is not a problem, but an objective. In the case of the Somme Bay, the perception and influence of tourism are slightly different, as they are already developed. It illustrates an original scenario, where within a productive region in decline, an attractive tourist area has emerged, largely ignoring the industrial past. Previously a food-producing area, the Bay has become culture and event-driven. The Grand Site Operation was launched in 2002 to rehabilitate sensitive natural areas, combat the erosion of fragile environments, work for the reopening of the large landscapes of the Bay, but also to find responses in terms of flow control. Here, and contrary at present to the two other cases of this type, inhabitants can be disturbed by the development of tourist activity (usage disturbance, proliferation of paid parking spaces, rising house prices, hunting practices, and so on), but it remains an undeniable and uncontested lever for territorial development.







Finally, although there is not always a link between the site's economic development mode and its territory, again we can observe positive signals here. These signals are confirmed at least for the Somme Bay and the Mining Basin since the level of tax wealth - modest or very modest - has tended to increase more significantly than on average. The case of Le Havre is more complex due to other urban factors contributing to a fiscal situation which is not very favourable if there is a need to face high expenditure in the future.

These results support the assumptions made in the introduction of this publication. Thus, depending on the location, the 'heritage-territorial' link will be more or less able to form a system and thereby ease or transcend tensions between economic, political, environmental, and socio-cultural issues. These heritage-territorial systems are then more or less able to contribute to the development of the territory as a whole. In the end, the heritage component is a resource which varies according to the contexts, and in any event, necessarily needs to be activated. Seeing positive signs related to a new attractiveness around the site in former industrial territories is very interesting. It proves that a collective and politically supported heritage enhancement process can contribute to the renewal of the territory by accompanying the change of image, by capitalising on the past, and by putting the territory into a satisfying narrative form after decades of disrepute. Heritage thereby asserts itself as a possible territorial resource and questions in that sense the means that are in practice at the disposal of the local authority to be used.

### **The fiscal and financial situation of the local authorities concerned by outstanding heritage sites**

The aim of the fiscal and financial typology drawn up in the previous chapter was to participate in the choice of the sites retained as study areas, and to formulate the first findings regarding the relationships between the sites and their territories. However, it is useful to complement it with a new analytical and diachronic perspective. In particular, how have the fiscal and financial situations of the local authorities concerned



by the presence of an outstanding site evolved since the beginning of the 2000s? Do these local authorities experience specific dynamics in this regard, to the extent that one can make the assumption of an effect – positive or negative – related to the very presence of this site? Do we observe for the localities involved, the existence of specific fiscal and/or financial trajectories, capable of influencing their spending capacity for the benefit of the concerned territories and heritage properties?

Prior to this analysis, various sensitive points, relating to the strategic dimensions of the budgets of local authorities, are examined. The first concerns the tax wealth of the local authorities containing an outstanding site. The second concerns the expenditure of the local authorities concerned. The third concerns their debt. Finally, a synthesis is drawn up, showing the interrelations between these budget items and their specificities for outstanding sites, grouped into similarity classes. Indeed, all are not similar from these points of view: the current and potential room for manoeuvre is distributed unequally, suggesting differentiated futures of the sites and their territories, in terms of both action capacity and management practices.

### **Unequal local authorities in terms of wealth depending on the sites**

The analysis of the level of wealth of the local authorities, reflected by the value of their fiscal capacity, is central. Indeed, this level largely determines their capacity to mobilise resources and as a consequence, to spend. Pioneer studies on the subject, conducted by G. Gilbert and A. Guengant, have shown the decisive importance of resource criteria, explaining 62% of the disparities in expenditure between communes. Recent work confirm this state of affairs: in 2015, the variables in question still contributed at 39% to the explanation of disparities in spending between intercommunal groupings (Court of Auditors, 2016). Examining the situation for local authorities hosting an outstanding site then takes on the greatest importance.

Table 9: Tax wealth and trends (2002 to 2015), various categories of communes  
 Source: Drawn up by the authors based on DGF files

category	1	2	3	4	5	total
	RGSF or OGS	UNESCO	rest of the communes of an EPCL containing a site	communes of an EPCL bordering a site	other communes	
nb sites/communes	341	604	4597	10,649	20,311	36,502
in %	1%	2%	13%	29%	56%	100%
fiscal capacity 2002, in € per capita	<b>529</b>	<b>809</b>	<b>513</b>	<b>538</b>	<b>546</b>	<b>572</b>
coeff. variation	<b>0.55</b>	<b>0.52</b>	<b>0.65</b>	<b>0.63</b>	<b>0.75</b>	<b>0.68</b>
trend	average increase 2002-2010	weak variations	strong progression between 2002 and 2010	variable/uneven progression between 2006 and 2015	slow progression between 2002 and 2006 then average and then strong	
	average increase 2002-2010	weak variations	strong progression between 2002 and 2010	variable/uneven progression between 2006 and 2015	slow progression between 2002 and 2006 then average and then strong	

Note: in bold, the averages by category that are significantly different from the overall average at the statistical threshold of 95%; the fiscal capacity is expressed in € per capita DGF.

A first observation is evident from the outset: the analyses indicate that the average values of communal fiscal capacities in the different years taken into account<sup>21</sup> (expressed in € per capita) are (strongly) correlated. This means that the trajectories of the communes hosting the sites are relatively homogeneous, and without any particular disruption<sup>22</sup>.

<sup>21</sup> The communal data at our disposal (from the annual files used for determining the annual amount of the general operating grant (Dotation Globale de Fonctionnement, DGF) given by the State to the local authorities) concern the years 2002, 2006, 2010, 2013 and 2015. The fiscal reform in 2010, including the abolition of the business tax, led to changes in the composition of the tax basket available to local authorities. In order to reason on a like-for-like basis with regard to taxes, the comparisons are performed between the years preceding the effects of the reform on the one hand (2002 to 2010) and between the following years on the other hand (2013 to 2015).

<sup>22</sup> Because of these correlations, we retain the capacity value in 2002 as the basis for assessing the local wealth.



The various categories of communes selected have contrasting characteristics (Table 9).

Overall, the communes hosting in whole or in part a RGSF site or an OGS are less wealthy than the average. Their wealth has not increased significantly. Even if there is a momentum due to the site, it is not accompanied by a tax base rise effect. Or its strength was not sufficient to change the situation and the dynamics specific to the territory. This could be for example the case in the Somme Bay (low rental values, a 'difficult' territorial context...). Generally speaking and all else being equal, the communes in question are not best placed, from the point of view of their means and the progression of those means, to undertake actions in favour of the sites.

On average, the communes hosting a UNESCO site are more wealthy. Within the category, there are urban or densely populated and wealthy communes<sup>23</sup> (Toulouse, Bordeaux, Paris...) while others, smaller in terms of inhabitants, have more modest (unit) bases. Some very sparsely populated communes have a particularly high capacity (expressed in € per capita). This is for example the case of the commune of Mont-Saint-Michel (about €4350 per capita) as well as communes such as Gravelines (which is part of the Belfries of France, slightly more than €3040 per capita), Roquefort (in the Causses and Cévennes, with nearly €2800 per capita) or Gèdre (Pyrenees - Mont Perdu site, with approximately €1680 per capita), etc.

As a result of their endowment in tax bases, the communes in this sub-group potentially have some leeway to incur expenses. In general terms, however, their wealth shows little change.

The neighbouring communes of a site (belonging to an EPCI containing a site), proportionally, more numerous than the previous ones, are less wealthy than the average. Their tax bases increased more rapidly than the average between 2002 and 2010. This form of enrichment would attest to a catching-up process.

<sup>23</sup> The tax wealth of the communes generally increases with their size in demographic terms (DGCL, BIS, 2017).

The communes located close to those hosting a site (belonging to an EPCI bordering a site) are also less wealthy than the average. The rise in their wealth has been irregular, and quite rapid since 2013. Do they benefit from an extension, both spatial and temporal, of the effects mentioned for the communes of the preceding category?

The other (so-called ordinary) communes, also less wealthy, have overall seen their wealth increase slightly at the beginning of the 2000s, and more rapidly since 2013. The dynamics of the communes concerned by the sites do not significantly depart from these trends.

Finally, three major points already appear.

Whatever the possible enhancement effect due to the effect of a site, the territorial (in particular urban or demographic) contexts play an unquestionable role in the development of tax wealth. Then, there is no unique wealth gradient according to which wealth would be more abundant where there are outstanding heritage sites, and would decrease with increasing distance from the communes hosting them. Finally, even if wealth evolves moderately and without any significant disruption, the dynamics are not totally similar, allowing inequalities in situations between communes to persist.

When the communes are grouped by site of belonging, we observe that differences in wealth separating these sites are intense<sup>24</sup>. The trends are themselves clearly differentiated, ranging, for the period 2013-2015, from -2% to 5%<sup>25</sup>: some lose (relatively) in tax bases while others grow rich.

Generally speaking, it appears that the richest sites (which are fewer but often the most urban ones such as Paris or the most atypical ones such as Mont Perdu...) are not those whose wealth increases the most during the period selected. On the contrary, the fiscal capacity values and their growth vary inversely, which confirms the occur-

<sup>24</sup> If we look at just extreme values, the average fiscal potential ranges between €216 per capita (for the Pointe du Raz in Cap Sizun), and €1378 per capita in Paris (banks of the Seine); it even reaches €1680 per capita for the site of Mont Perdu (see above).

The population in the sense of the General Operating Grant (DGF) is retained (i.e. mainly the population plus 1 inhabitant per secondary residence).

<sup>25</sup> Respectively, on the one hand for the sites of Mont-Perdu, of the Restonica Valley, on the other hand for the sites of the Marsh and Stronghold of Brouage, of the Dune Massif of Gâvres-Quiberon.

rence of catching-up effects. However, this process is partial, as the level of wealth of the least endowed sites (including the Somme Bay, the Mining Basin, the Gorges of Ardèche...), which are otherwise the most numerous, is well below the overall average. A gradation of means and potential spending capacity, persists and separates local authorities and the sites within them.

The tax wealth of local authorities and then the tax revenues they collect come from the amount of tax bases relating to properties for residential use on the one hand, and to the presence of economic activities and their dynamism on the other hand. What is then the importance of these two components for intercommunal groupings (hosting outstanding sites), contributing to determining their own situation?

The first observation is that there is no 'site effect' which is really noticeable in terms of the fiscal valuation of properties for residential use.

The exploration of the Filocom database leads to this observation<sup>26</sup>. Indeed, the database includes information concerning the tax bases of the housing tax HT paid by the occupants of residential premises, and this tax is an essential fiscal resource for local authorities.

The available data are appropriate to pursue a triple questioning. In particular, are the levels of the bases in the (localities hosting) outstanding sites and in their vicinity higher than elsewhere, reflecting a land/property valuation process due to the presence of the sites?

<sup>26</sup> We then rely in particular on indications relating to the fiscal values attributed to dwellings for the purpose of taxation and on the parameters for their determination. In particular, for each commune and/or intercommunality, the average rental value (in € and €/m<sup>2</sup>) of dwellings is indicated. In the fiscal sense of the term, the cadastral rental value of a dwelling place represents the rental income that the property would bring in if it were rented in so-called normal market conditions. This value mainly depends on the dwelling's degree of comfort (represented by its tax category) and surface area, both of these parameters being determined in accordance with the codified administrative valuations. The rental value, established based on references dating from 1970, gives rise to a yearly recalculation, by application of a national coefficient (set in the Finance Law). The extractions from the Filocom database made available then make it possible to know, by territory, the distribution of dwellings across tax categories, across surface area groups, and to monitor the evolution of the bases, by range of values.

Are we witnessing over time in these places, an increase, itself particular, of the tax value of dwellings (and of their characteristics), corresponding to a rise in price, in connection with the heritage process undergone by these sites, and also in connection with the development process which is specific to the territories hosting the sites in question?

Are this state of affairs and these dynamics common to all the sites or on the contrary, do specificities appear, that we can relate to local characteristics and contexts?

Generally speaking, following the treatments, it appears that the degree of comfort of second residences and that of primary residences are not the same: the second are 'rather/fairly comfortable' whereas the first are proportionately more present among the so-called 'poor/very poor' dwellings or on the contrary, 'great luxury/luxury/very comfortable' dwellings. Whereas there are second residences of all sizes, primary residences with a large surface area (95m<sup>2</sup> and above) are proportionately the most numerous. It follows from these characteristics that the average rental values of primary residences are higher than those of second residences (in average, €3000 for the first, €2400 for the second).

Hence, structure effects are seen, depending on the composition of the housing stock, justifying differences in tax base levels between the communes of the same site and between sites. Of particular importance is the tourist vocation of the places, which is strongly differentiated (the relative share of occasional dwellings ranges from 1 to 8% in 28 sites - among the 70 study sites - mainly urban, industrial or agricultural ones, and reaches 54 or even 81% for the most 'touristic' ones).

Furthermore, whether it be second residences or primary residences, the qualities of the stock are not similar everywhere. In particular, the rental values of occasional dwellings differ significantly according to the sites, from less than €2000 (in sites such as the Gorges of Ardèche, the Canal du Midi, the Marais Poitevin, among the selected study areas) to nearly €4000 (for a site such as the Ochre Massif, among the study areas), or even more than € 5000 (for sites such as the Dune of Pilat, the Domaine du Rayol). Depending on the places, attracting a passer-by or a tourist does not yield the same tax windfall.



Around an average of €40/m<sup>2</sup>, rental values are variable, depending on the state of the housing stock, its composition and the territorial context. For the selected study sites, they range for example from slightly less than €25/m<sup>2</sup> (Gorges of Ardèche) to nearly €50/m<sup>2</sup> (Le Havre).

The increase in rental values (between 2003 and 2013) also depends, according to the sites, on the initial characteristics of the stock. In general terms, the bases increase, since the surface areas of dwellings tend to increase, as well as their degree of comfort. Nevertheless, local dynamics are not all similar to the overall trend. It appears that the share of 'comfortable/rather comfortable' dwellings increases in a privileged way in communes where these housing categories were already well represented; conversely, this progression is much less significant where the dwellings were initially 'ordinary to poor'. The trends are thus as much the result of general catching-up mechanisms as of specialisation processes.

Given the multiplicity of factors that can affect the changes in the housing stock, a structural-residual analysis is conducted (for dwellings distributed by fiscal categories). It indicates that, alongside the overall trends, context effects or local facts occur, in some cases strongly, whether favourably (for the localities of the Gorges of Ardèche, the Ochre Massif, along the Canal du Midi, for example) or unfavourably (for the communes within the Marais Poitevin and the Mining Basin for example).

Different logics jointly manifest themselves. For example, in the Somme Bay, and given the composition of the stock in each commune, local factors play in favour of the localities situated at the limits of the site and at its external periphery, and for the benefit of those near the coastline, leading to a marked increase of their housing stock and consequently, of the tax bases. Density or saturation effects in some areas, land and real property price differentials, protection measures, regulatory constraints, and so on, influence in any event the dynamics, either supporting or counteracting them. As another example, along the Canal du Midi, a number of small communes in terms of inhabitants are evolving very positively, as well as several localities close to certain urban centres, all not being equally attractive. Thus, we do not observe the existence of a 'Canal du Midi effect' which would affect all the communes crossed by or bordering the canal equally.

In any case, whereas there are residential property valuation processes that can be attributed to the existence of an outstanding site, from a fiscal point of view, they manifest themselves in different ways within the territory concerned, or in its surroundings. The presence of the site does not provide the same taxable resources everywhere. In this context, we can sense that the development (and then implementation) of common strategies among the local authorities involved, to enhance and maintain the heritage elements of the site with a view to collecting local tax revenues, cannot be taken for granted.

This will be especially true given that the differentiations and processes highlighted concern not only the housing tax, but also the real property tax, payable by households for their properties for housing use. This generates a redundancy effect, especially marked as the local productive fabric is modest and as, consequently, the local authorities are dependent on their residential taxation and its bases<sup>27</sup>.

<sup>27</sup> The property tax on developed properties is paid by households and companies. The share of each of these different types of taxpayers is not known, but can be estimated. On average, 59% of the property tax bases for developed properties are represented by dwelling values, and are therefore dependent on households. This share is highly variable according to the places/sites (it is worth for example 13% for the site of Pyrenees-Mont Perdu, 46% for the site of Rocamadour and 86% for the Domaine du Rayol).



As a consequence, the fiscal (then financial) fragmentation, related to communal crumbling and to the specialisation of territories, could obstruct the emergence of federative logics, the formulation of general development policies, whether it is to capitalise around the perceived effects of the site or to lift the cumulative barriers to the attractiveness of the housing stock and finally, to that of heritage properties.

The second observation is related to the unequal endowment of the sites with respect to tax contributions from economic activities. The main taxes applicable since 2010 are considered, namely the corporate real property tax (Contribution Foncière des Entreprises, CFE) (based on the real property of companies), the corporate value added tax (Cotisation sur la Valeur Ajoutée des Entreprises) (based on their creation of added value), both constituting the territorial economic tax (Contribution Economique Territoriale, CET). We also integrate the fiscal compensations, paid by the State, and allocated to local authorities in order to neutralise the effects of various exemptions for local budgets and to alleviate the effects of the fiscal reform in 2010. The amounts of the flat-rate taxes for network companies (Impositions Forfaitaires pour les Entreprises de Réseaux, IFER) are also taken into account: paid mainly by companies in the sectors of energy, rail transport, and telecommunication, these taxes can play a major role locally in funding the budgets.



Table 10: Unit amounts of taxes paid by economic activities, intercommunal groupings IG, 2015, in €/job

Source: Drawn up by the authors based on DGF files, Insee

	CVAE/job			CET without compensations / job			CET and compensations / job			IFER / job		
	total	IG off-sites	IG sites	total	IG off-sites	IG sites	total	IG off-sites	IG sites	total	IG off-sites	IG sites
nb Intercommunal groupings IG	2139	1858	281	2139	1858	281	2139	1858	281	2139	1858	281
Average	268	273	258	832	878	812	938	878	1066	39	43	30
coeff. variation	0.28	0.31	0.16	0.54	0.89	0.39	0.86	0.89	0.78	3.31	3.24	3.39

Note: IG Intercommunal Grouping consisting of the possible Establishment for Intercommunal Cooperation and its member communes; isolated communes each constitute an IG.

In connection with the unequal distribution of economic activities, the (unit) amounts of the contributions are highly variable across intercommunal groupings, whether or not they host outstanding heritage sites.

The variability is low for the CVAE, which is counter-intuitive as it is often considered that all jobs are not equally wealth-producing. In actual fact, a job, regardless of the place where it is situated and whatever its nature, pays about €260 in this respect. This is related to the very nature of the contribution, which is so-called administered. Indeed, its scales and rates are independent of local fiscal choices; its distribution among territories/local authorities is carried out mechanically<sup>29</sup>.

Nevertheless, the modes of territorialisation of the added value, jointly with the particularities of local production facilities, lead to variations in the amounts received when

<sup>29</sup> The mode of territorialisation of the contribution and the methods for consolidating the results of businesses belonging to the same group lead to distortions between places, those where value is created and where 'wealth' is actually produced, and those where the contribution is received. It appears that the current distribution keys are not totally in accordance with the principles of equity between local authorities (Bonnet et al., 2014).



we consider them more precisely, at the site level. The yield of the Contribution exceeds €300/job in a few groupings (around Fontainebleau, the Abbey of Fontenay, Bourges, Saint-Guilhem-le-Désert, the Domaine du Rayol, the Gulf of Porto, the Pont du Gard (Roman Aqueduct)). According to the places, the high values come from the nature of local productive activities (traditional industry...) or from the tourism vocation of the places.

The contrasts between sites are more marked in terms of CET excluding compensations. As one might expect, companies contribute little to local authorities in natural or agricultural areas (such as the Jurisdiction Saint-Émilion, the Sanguinaires Islands, the Marsh and Stronghold of Brouage, the Restonica Valley) and, in a less expected way, in other areas with a productive vocation, admittedly weakly pronounced (such as the site of Versailles). Conversely, the revenues are significantly higher where the CVAE is higher (Pont du Gard (Roman Aqueduct), Domaine du Rayol...), where there are specific activities (Dunes of Flanders, around Dunkirk and its particular business fabric, Cove of Paulilles...). Thus, in many cases, high values are not related to the presence of the outstanding site.

It is worth noting that the highly contrasting profiles in terms of productive activities (and territorial development dynamics) can finally lead to similar (unit) contribution amounts: this is the case of the grouping around Le Havre and those including the Gorges of Ardèche.

It is clear that, if the outstanding site is the driving force of territorial economic development, the fiscal consequences are not the same everywhere. Given the particularities of the local taxation, it appears that the activities present in the territories of outstanding heritage sites, according to their nature, whether or not they are related to the sites themselves and their number of visitors, produce more or fewer resources for local budgets, in light of the local context. Economic actors and the territory thus contribute in varying degrees to the profit of the site.

A form of tension also appears between the productive requirements, local needs for fiscal resources, presence of activities and nuisances, or damage to the qualities of the site. Indeed, we observe for example that the unitary revenues from the IFR can be substantial for a number of sites<sup>30</sup>. Frequently, the taxed activities are sources of negative externalities (power plants and related facilities...), or undermine the quality of landscapes (pylons, networks...). They may therefore contravene the advantages and overall amenities of the sites. Nevertheless, these activities contribute to financing actions relating to the protection of heritage properties, to the management and development of their access, and so on. Furthermore, are the tax revenues then 'fair' returns, equal to the nuisance caused by the productive activities in question to the very nature of the outstanding sites concerned?

### **A high variability in the expenditure of local authorities**

The pressure of outstanding heritage sites on local budgets is commonly mentioned.

The presence of heritage properties would generate, in multiple ways, heavy expenses for the local authorities involved. This would result in tensions and risks of imbalances, increasing with the reduction in State endowments, with the slower increase in revenues raised from local taxation.

<sup>30</sup> More than €70/job for example for the Restonica Valley, the Circus of Navacelles, the Pointe du Raz, the Gulf of Porto, the Causses and Cévennes, the Dunes of Flanders, St-Guilhem-le-Désert, the Pont du Gard (Roman Aqueduct).

<sup>31</sup> According to one of the rare studies on tourism and local finances (De Biaisi, 2008), tourist communes appear to be bigger spenders in terms of operation and especially in terms of investments. It should be noted that only tourist communes with more than 10,000 inhabitants are taken into account, and compared to the national averages. The cited study further emphasises that, in these communes, the level of taxes (on a unit basis) is significantly higher than elsewhere. It has been established that the fiscal wealth of local authorities has an impact (positive) on the amount of their expenditure (Guengant, Gilbert, 2010). It can therefore be hypothesised that tourist communes spend more, being more wealthy from the point of view of local taxation, precisely because they are 'touristic'. The opposite hypothesis can also be formulated: they must collect more, in order to cover the expenses attributable to tourism... The direction of the correlation has not been established.

The literature concerning the surplus of expenses that tourist communes would incur is both rare and ambiguous. What do we observe concerning the local authorities, communes and intercommunal groupings that host outstanding sites?

When we examine the expenses of the communes by considering them in a dynamic manner between 2002 et 2015, various trends appear.

Table 11: Communal expenses, communes of the sites and communes outside the sites, 2002 and 2015, various indicators

Source: Drawn up by the authors based on [data.gouv.fr](http://data.gouv.fr)

category	1	2	3	4	5	total
	RGSF or OGS	UNESCO	rest of the communes of an EPCI containing a site	communes of an EPCI bordering a site	other communes	
number of communes	340	604	4583	10628	20258	36413
total expenditure 2002, in € per capita	<b>1305</b>	<b>1490</b>	<b>1024</b>	1173	<b>1102</b>	1161
equipment rate (2002-2004), in %	<b>25%</b>	<b>20%</b>	<b>27%</b>	<b>32%</b>	<b>31%</b>	29%
rigidity coefficient 2002, in %	<b>57%</b>	<b>57%</b>	<b>55%</b>	<b>55%</b>	<b>53%</b>	54%
total expenditure 2015, in € per capita	<b>1664</b>	<b>2007</b>	<b>1326</b>	<b>1389</b>	<b>1369</b>	1452
equipment rate (2013-2015), in %	28%	<b>26%</b>	<b>28%</b>	<b>30%</b>	<b>31%</b>	29%
rigidity coefficient 2015, in %	<b>56%</b>	54%	<b>54%</b>	<b>54%</b>	<b>52%</b>	53%
average annual rate of change in total expenditure (2002-2015), in %	1.89%	2.32%	2.01%	1.31%	1.68%	1.73%

Note: in bold, the averages of categories that are significantly different from the overall averages at the statistical threshold of 95%.

First of all, the communes hosting an outstanding site, and especially those containing a UNESCO site, spend more than the average, in 2002 as well as in 2015 (Table 11). This superiority is not only attributable to the presence of the site. The level of expenditure of local authorities is indeed highly dependent on that of their wealth and it is apparent that the creation of this wealth depended on multiple factors (see above).

Then, the increase, between 2002 and 2015, in the expenditure of both communes hosting a site and EPCIs which themselves contain a site, is more significant than that of other communes. The site's number of visitors and its management, the required amenities, the costs associated with the awarding of the label... can lead to this increase, which is faster there than elsewhere. Such an increase is in any event likely to strengthen the perception of budgetary tensions on the part of the local managers involved, in an overall context where the constraints weighing on public finances are increasing.

In general terms, in the 2000s as in the more recent period, the equipment rate of communes with a site is lower than elsewhere. It looks as if the presence of heritage properties does not generate any specific need in terms of investment and particular structure of communal budgets from this point of view. Those needs could be covered previously, in particular during the phase preceding the awarding of the label. We may furthermore hypothesise that these expenses are often beyond the communal budgets and are covered by ad hoc management entities (such as the joint associations). Furthermore, the urban or formerly urbanised communes are not those that develop the most facilities; many of them appear in the panel of 'communes with a site'.

Finally, and especially in 2002, the expenditure rigidity coefficient is higher for communes with a site than for the others. Compared to their revenues, the personnel costs and the payment of annual instalments on current loans are more considerable there than elsewhere. It is as if the investments made in previous years, the costs they entail for their operation and those due to the financing method selected, affixed their mark and generated a clear budget rigidity. The past choices would thus apparently be a source of financial constraints in the present, in those communes, compared to the others. The leeway for the future would be equally reduced as a result. Except by mobilising additional resources or by streamlining the current costs. Yet a large part of them would be incompressible since, as underlined, the increase in expenditure remains strong.

The diagnosis, therefore, is not unequivocal, concerning the surplus of expenses which would cost the communes hosting sites: for the communes concerned, the average level of expenses is indeed higher than elsewhere, but the current constraints seem to be due more to choices made in past periods, and before 2002 much more than in recent years. The perspective needs to be broadened since it is not only the communes which act. Indeed, the scope and the composition of intercommunal groupings have evolved in recent years.

Despite the rise in power and the inclusion of intercommunalities, their expenses are even less considerable compared with those of the communes<sup>32</sup>. Thus, the observations previously established persist when we broaden the scope of the expenses taken into account.

<sup>32</sup> In average, the expenditure of intercommunalities represents approximately one third of that of intercommunal groupings.

On the other hand, incorporating the expenditure of intercommunalities and the change of study period modify the hierarchy of expenditure patterns. With the intercommunalities and in recent years, expenses increase less where they are already the highest (localities concerned by a UNESCO site); the increase remains significant where there are OGS or RGSF sites. However, the situations and trends differ significantly when we reason at the scale of the site as a whole, whether we consider equipment rates, the expenditure rigidity coefficient or, more simply, the unit level of expenses.

This is the case for the localities containing labelled heritage properties whose expenses, while being moderate, are decreasing (Vézelay, Abbey of Fontenay...) A small number of communes of small size in demographic terms, in rural areas, are not always able to contribute high amounts to cover their costs, including those related (possibly) to the site. This raises the issue of the governance of these sites, of their management methods and means.

If we consider the sites where expenses close to the average (€2000 per capita) are incurred, there are marked differences in the trends of these expenses and we find various cases, some decreasing, sometimes even significantly, while others remain stable, and others increase. Likewise, the trends vary where expenditure is the highest.

Whereas these contrasts indicate the absence of a systematic dependency relationship between the level of expenses and their increase, they also indicate that, just as they are not strictly the same for the communes constituting a site, the financial trajectories of the sites are not similar. The local authorities concerned are not systematically exposed to high and steadily increasing costs. This leads us to point out again that the financial and management problems in these local authorities deserve to be examined on a case by case basis, in the light of these territorial configurations.

### **A more or less pronounced local indebtedness**

Borrowing has the advantage of immediately providing the necessary funds (for investments) and gradually effecting their repayment. Yet the weight of these financial costs limits future possibilities for action... What about these points of view for local authorities hosting outstanding sites or concerned by their presence?

We assess the debt burden of a local authority by examining its debt relief capacity. It represents the (theoretical) duration expressed in the number of years during which it would have to mobilise available funds (once the running costs, which are in general unavoidable, are paid) to reimburse its entire debt.

From a practical point of view, financial analysts consider that local authorities must avoid having recourse to loans when their debt relief capacity exceeds about 12 years.

Table 12: Debt relief, communes of the sites and off-site communes, 2002 and 2015, in years

Source: Drawn up by the authors based on [data.gouv.fr](http://data.gouv.fr)

category	1	2	3	4	5	total
	RGSF or OGS	UNESCO	rest of the communes of an EPCI containing a site	communes of an EPCI bordering a site	other communes	
number of communes	337	603	4560	10535	20075	36110
debt relief capacity 2002, in years	6.9	6.1	6.0	<b>7.6</b>	5.0	6.0
debt relief capacity 2015, in years	7.7	<b>9.9</b>	<b>5.4</b>	<b>4.5</b>	<b>6.7</b>	6.3

Note: in bold, the averages of categories that are significantly different from the overall averages at the statistical threshold of 95%.

Whereas, in 2002, the debt relief capacity of communes hosting an outstanding site was not significantly different from that of other communes, this is no longer the case in 2015 (Table 12). The (theoretical) repayment periods are higher for communes hosting a RGSF site (or an OGS) and especially, for those concerned by a UNESCO site. The outstanding debts there have grown faster than the funds available for their repayment. Overall however, whether for local authorities hosting an outstanding site or for so-called ordinary situations, the averages, in 2002 as in 2015, are below the threshold regarded as an indicator of strong pressure due to indebtedness. Whereas they exist, they are not generalised.

We observe local authorities of sites<sup>37</sup> for which the debt relief capacity is lower than the overall average (i.e. around 5 years) in 2002 as in 2015. The debt weighs little relative to the (theoretical) repayment capacities. With a few exceptions, the sites in question are mainly recognised for their landscape and environmental qualities; the local authorities are not among the largest ones from a demographic point of view. In those cases, are the needs in investments, and therefore in loans, less pronounced than elsewhere?

For some local authorities<sup>38</sup>, the debt weighed little in 2002, but it weighs more than average in 2015. During the period, the debt has grown faster than the repayment capacity. This reveals if not a degradation of the situation, at least an increase of budgetary pressure. All else being equal, the current resources will not be as readily available for equipment, the development of amenities, and so on, for the benefit of the site and the territory.

We also find local authorities for which the debt relief capacity is high in 2002 as in 2015<sup>39</sup>. Tensions due to the debt are strong to very strong. In those cases, the recourse to new loans can only be contingent. Much more than the previous ones, the localities are not well positioned to undertake ambitious equipment and/or development programmes based on their own budget.

Finally, in some cases, the debt relief capacity was strong in 2002 and is lower in 2015<sup>40</sup>

**37** This is the case for sites such as: Orange, Bibracte-Mont Beuvray, Restonica Valley, Giens Peninsula, Puy Mary - Cantal Volcano, Pointe du Raz at Cape Sizun, Gulf of Porto, Circus of Sixt Fer à Cheval, Gorges of Tarn, Puy de Dôme, Domaine du Rayol, Amiens Cathedral, Cape of Erquy - Cape Fréhel, Route of Santiago de Compostela, Circus of Navacelles.

**38** This is the case of sites such as: Marais Poitevin, Cliffs of Etretat, Côte d'Albâtre (Alabaster Coast), Provins, Cathedral of Chartres, Pyrenees - Mont Perdu, Clarée and Étroite valleys, Sanguinaires Islands - Pointe de la Parata (Parata Point), Abbey of Saint-Savin sur Gartempe, Paris, Fontainebleau.

**39** This is the case of sites such as: Albi, Val de Loire, the Deux Caps, Gorges of Ardèche, Pile dwelling sites, Reims, Fortifications of Vauban, Belfries of France, Canal du Midi, Carcassonne, Arsenal of Rochefort, Canigó Massif, Sainte-Victoire, Rocamadour, Solutré-Pouilly Vergisson, Camargue of Gard, Jurisdiction of Saint-Émilion, Avignon, Le Havre, Gorges of Gardon, Ochre Massif, Nancy, Bourges, Arles.



. The burden of loans has lightened. We could suppose that significant investments and developments (OGS for example) were made in the 2000s and that the loans to which they gave rise are now (almost) reimbursed, without the emergence of new external and temporary financing needs. The communes were also able to increase, under the weight of administrative stringency efforts, their ability to repay. The debt relief capacities are below the threshold considered as indicating entry in a risk zone. Leeway then exists if needs for new loans arise.

Similar explorations were conducted by considering not only the communes, but by including the intercommunalities to which they belong. There neither, the change of scope does not alter the meaning and significance of these observations. It clearly appears that despite significant differences between territories, the situations in terms of indebtedness of the localities with outstanding heritage sites are neither alarming nor deteriorating markedly. In most cases, leeway exists for future loans, in accordance with the accepted thresholds. The presence of an outstanding heritage site, in any case, does not mean a massive and prohibitive indebtedness.

### **Contrasting ‘models’ marked by inertia**

The previous thematic explorations do not reflect the dependence relationships existing between financial items. Multidimensional analyses were then performed to take these interrelations into account, to extract the most significant elements and, as a synthesis, to provide overall pictures, or models.

**40** This is the case of sites such as: Cove of Paulilles, Somme Bay, Dune of Pilat, Dune Massif of Gâvres-Quiberon, Versailles, St-Guilhem-le-Désert, Pont du Gard (Roman Aqueduct), Vézère Valley, Lyon, Mont-Saint-Michel, Nord-Pas de Calais Mining Basin, Vézelay, Sites of the Vézère valley, Bordeaux, Port de la Lune (Port of the Moon), Causses and Cévennes.

Even if differences in the analyses (PCA) conducted for the different dates retained appear, they are minor. This provides a first element of result: the financial situations of the local authorities considered are marked by inertia, by the permanence of the factors underlying their similarities or differentiations.

The structuring facts remain: the localities can first be distinguished according to their level of wealth and expenditure. Some are rich and spend, and others don't: including within the restricted sub-group consisting of the local authorities of outstanding heritage sites, inter-territorial differences in means and local public action are strong and persist. Secondly, localities with strong local public investment dynamics contrast with those where rigidities are substantial. This is sometimes the result of a temporal effect, attributable to past financial choices, as we have underlined. There we can also see two contrasting cases of local public action: one oriented towards achievements (localities where building takes place), the other oriented towards routine tasks, towards the provision of services (generating heavy personnel/administration costs). In both cases, this has major consequences for future evolutions: if bifurcations must occur, to adjust financial behaviours to the rarefaction of public resources or to the pressure of needs related to the presence of the sites, we will unquestionably have to take account of existing situations and existing management methods, creating as many paths of dependence.

Based on these structural facts and their stability, the inter-temporal analyses serve to update the fiscal and financial trajectories that local authorities precisely follow, and which may differ from the major overall facts. The local authorities are for this reason grouped according to their site of belonging.

In order to take into account the internal heterogeneity of the sites, an additional variable is introduced: the coefficient of variation of communal fiscal capacity (in 2002).

Moreover, it appears in the analyses that this variable and that which captures the very value of the fiscal capacity are always in opposition. Schematically, wealth is great and concentrated, or alternatively, low and dispersed. This means that, all else being equal and on the whole, taxable sources are more abundant, or more valued, in one-off sites (urban sites or specific natural sites - see above) than in the more extended or composite ones. This underscores again the fact that resource constraints and resource mobilisation are radically different in each of the cases in question.

Finally, based on a classification, the sites can be grouped into 7 similarity classes (Table 13). A number of them have a low number of sites. While not omitting these specificities<sup>42</sup>, attention is paid mainly to the most common situations. Then what are the main significant elements of the different classes in question?

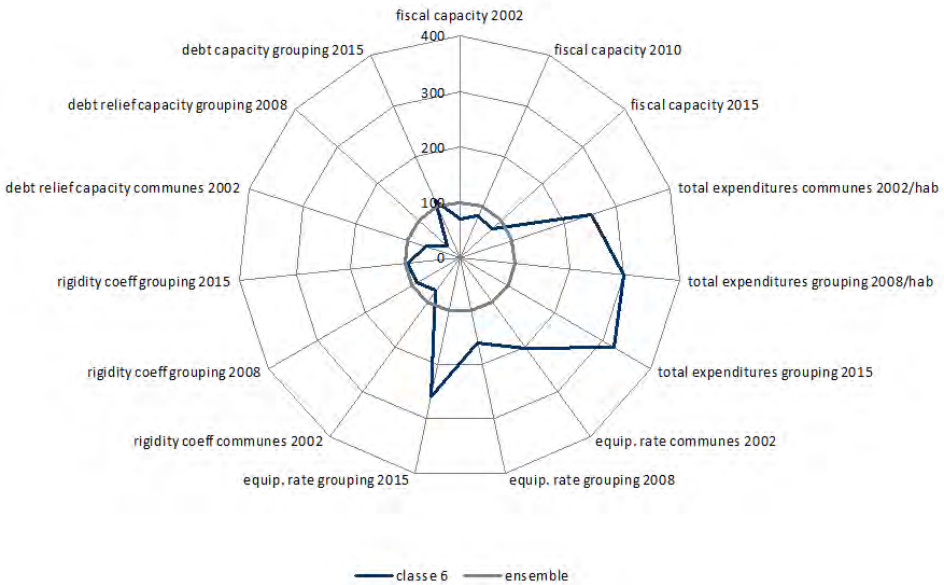
Table 13: Similarity classes, typology, communes grouped by sites, 2002-2008-2015  
Source: Drawn up by the authors based on [data.gouv.fr](http://data.gouv.fr)

Class	1	2	3	4	5	6	7	total
number of sites	2	1	13	19	1	4	30	35
in % total	6%	3%	37%	54%	3%	11%	86%	100%
central objects	Domaine du Rayol	Pyrenees - Mont Perdu	<b>Gorges of Ardèche</b>	Vézère valley sites/caves	Arles, monuments	Bordeaux, Port	Bourges Cathedral	

<sup>42</sup> The Pyrenees-Mont Perdu site is distinctive owing to its great wealth and thus, high level of (unit) expenses. The site of Arles is singular owing to a high savings rate and debt level in 2015.

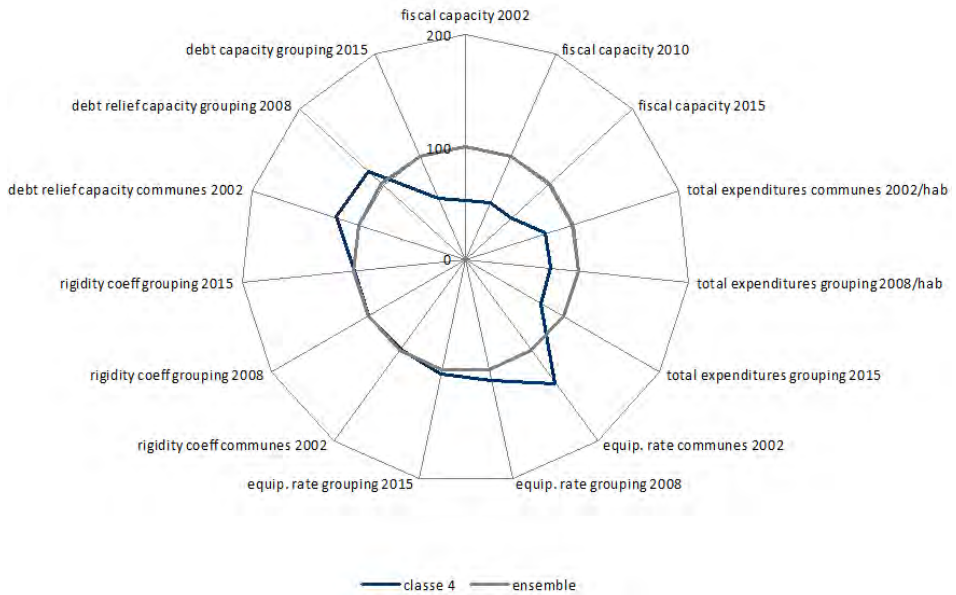
The profiles of the different classes identified are presented schematically and set out in broad terms.

Figure 8: Profile class 1 (Domaine du Rayol and Clarée and Étroite Valleys)  
 Source: Drawn up by the authors based on data.gouv.fr



Whereas this first class represents situations that are still infrequent, these ones illustrate potential reversals, non-linearity likely to occur under the weight of the needs and/or responses in terms of financial policies. The particularity of these situations is related to the relative disconnection between the expenditure level (which has been high since 2008) and that (average) of the potential wealth. The value of the debt relief capacity is high in 2015 as well as that of the equipment rate: loans were contracted to provide the resource complements necessary for investments. The rigidity is not intense, which suggests the current existence of leeway. Will it last, given the recent dynamics which led to a certain rise in tension, and latent fragilisations?

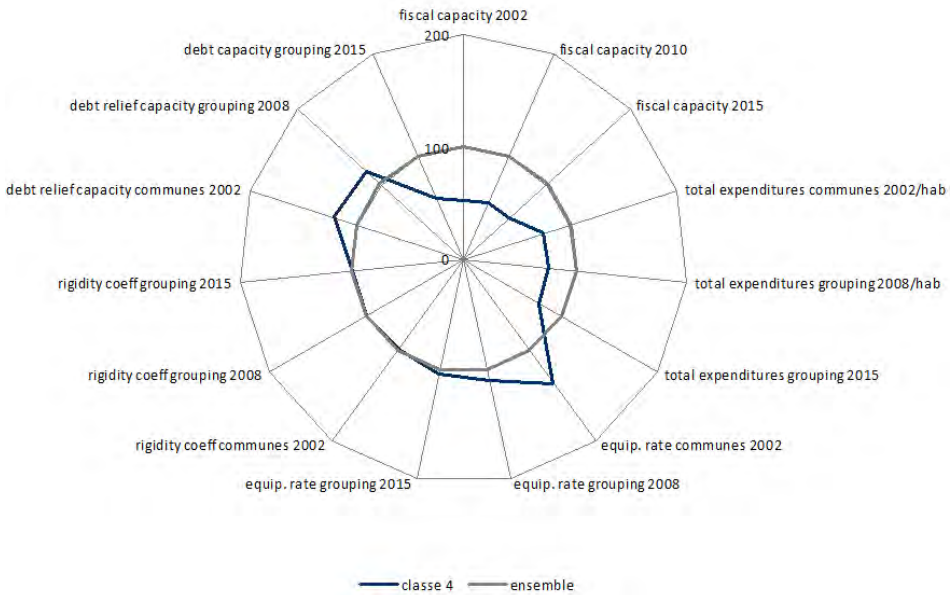
Figure 9: Profile class 3 (rather like the Gorges of Ardèche)  
 Source: Drawn up by the authors based on data.gouv.fr



The sites of this class<sup>43</sup> have a common feature: their wealth level is low to modest. Despite that, the localities concerned made rather high expenses, particularly in terms of equipment, especially at the beginning of the period. Therefore, they obtained loans and in connection, the debt relief capacity was strong at that time. The pressure on all or part of the budgets seems to have eased. Investments did not massively increase operating expenses. Nevertheless, could general maintenance, administration and recurrent management have been adversely affected? Rigidity is not so strong and latitude seems to exist in terms of expenditure. Nevertheless, the altogether moderate availability of fiscal wealth remains a strong constraint: it does not suggest massive dynamics which could be provided for heritage properties and the developments required. This can be related to the territorial and heritage situations in question. These are very diverse. A common feature would link them however: for most of them, they are contexts where territorial development dynamics are altogether moderate; the territory can hardly serve as a financial resource for the site.

<sup>43</sup> They are the following: Abbey of Saint-Savin sur Gartempe, Cistercian Abbey of Fontenay, Bibracte-Mont Beuvray, Circus of Navacelles, Circus of Sixt Fer à Cheval, Gulf of Porto, Gorges of Ardèche, Gorges of Tarn, Marsh and Stronghold of Brouage, Dune Massif of Gâvres-Quiberon, Puy Mary - Cantal Volcano, Pile dwelling sites, Vézelay.

Figure 10: Profile class 4 (rather like the Vézère valley sites/caves)  
 Source: Drawn up by the authors based on data.gouv.fr

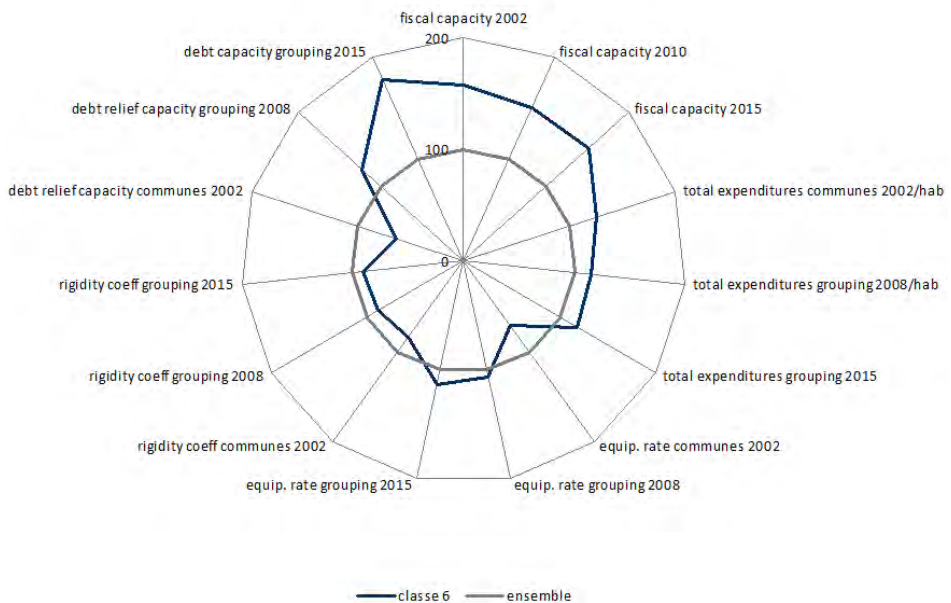


The localities of the sites of this class<sup>44</sup> are among the smallest spenders. They extensively developed facilities at the beginning of the period and the dynamics have been slowing since, compared to the other sites. The bottlenecks to increased spending are multiple: they are related to rigidities due to past policies, to the debt burden and to the moderate level of potential wealth. As such, the capacity to act of these local authorities is restricted. Again, and as for the previous sites, the development dynamics of the territories concerned are not very intense; they are hardly conducive to the relief of budgetary tensions which we already suspect to be strong.

<sup>44</sup> The sites in the class are the following: Somme Bay, Mining Basin, Cape of Erquy - Cape Fréhel, Chartres Cathedral, Grande Saline, Estuary of the Charente river/Rochefort Arsenal, Cliffs of Etretat, Gorges of Gardon, The Causses and the Cévennes, Deux Caps, Marais Poitevin, Mont-Saint-Michel, Pointe du Raz, Pont du Gard (Roman Aqueduct), Puy-de Dôme, Sites of the Vézère Valley, St-Guilhem-le-Désert, Theatre of Orange, Restonica Valley.

Figure 11: Profile class 6 (rather like Bordeaux)

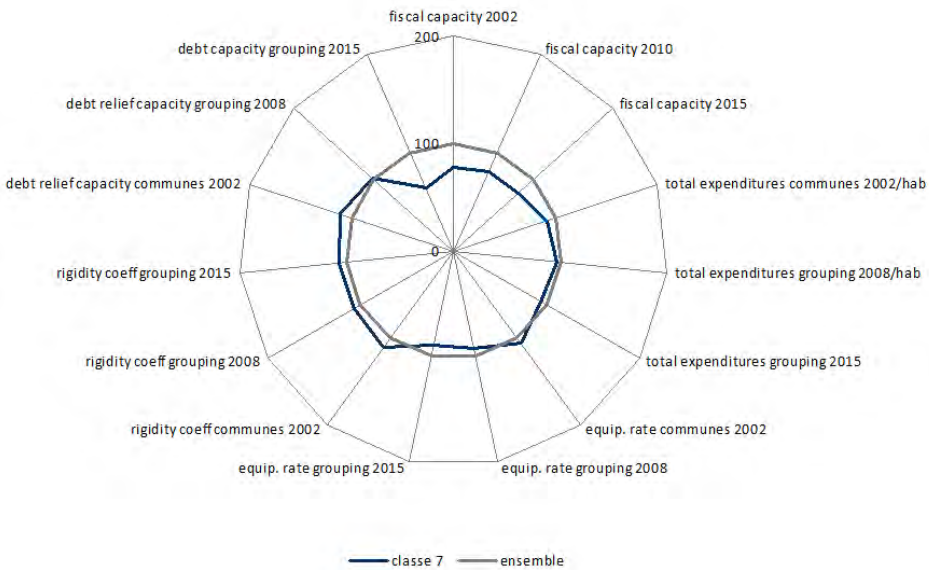
Source: Drawn up by the authors based on data.gouv.fr



The localities in this class<sup>45</sup> are rich and spend accordingly. The local public investment dynamics are high, particularly since 2008. In connection with this, the debt relief capacities increase. This can potentially limit the budgetary capacities for the years to come and the possibility to continue similar policies. The sites in question are located in urban, or metropolitan contexts: the territorial dynamics at play should make it possible to consolidate the wealth acquired and therefore, to mobilise the resources to support the required investments.

<sup>45</sup> The sites in the class are the following: Bordeaux, Port de la Lune, Notre-Dame Cathedral/ancient abbey of Saint-Rémi/Tau Reims palace, Paris (banks of the Seine), Sainte-Victoire.

Figure 12: Profile class 7 (rather like Bourges Cathedral)  
 Source: Drawn up by the authors based on data.gouv.fr



The localities in this last class<sup>46</sup> (proportionately the largest in number) have a profile which is not very far from the overall averages. Finally, they constitute the common lot of the localities hosting the sites, from a fiscal and financial point of view.

<sup>46</sup> The sites in the class are the following: Cove of Paulilles, Belfries of France, Camargue of Gard, Canal du Midi, Amiens Cathedral, Bourges Cathedral, Historic Centre of Avignon, Route of Santiago de Compostela, City of Carcassonne, Episcopal City of Albi, Dune of Pilat, Dunes of Flanders, Fortifications of Vauban, Sanguinaires Islands, Jurisdiction of Saint-Émilion, Le Havre, Ochre Massif, Canigó Massif, Palace and park of Fontainebleau, Palace and park of Versailles, Stanislas Square Nancy, Giens Peninsula, Provins, Rocamadour, Lyon Site, Solutré-Pouilly Vergisson, Strasbourg, Val de Loire, Vézère Valley, Salagou Valley.



They are slightly less rich than all the localities hosting a site. The amounts of their expenditure are slightly higher than average. They developed facilities at the beginning of the period, in the 2000s. Rigidities are strong. Despite the decrease of the debt relief capacity, which is becoming moderate compared to the averages, one may ask whether there is real room for manoeuvre for the financing of substantial expenses, if they appear necessary. These latitudes are not major and not everywhere: the budgetary futures and continued investment efforts such as maintaining the existing are in a number of cases hypothetical. Given the growing constraints weighing on local public finances, the management streamlining, or optimisation, policies already initiated by the local authorities will find their rightful place. Territorial dynamics will also play their role, as differentiation factors, leading in some places to the accumulation of tax bases, and elsewhere to a lower increase in taxable sources.

To summarise, and following these various complementary investigations, it appears that, in fiscal and financial terms, the localities grouped according to the outstanding heritage site they contain, have different profiles, in the image of what prevails for all the local authorities placed in so-called ordinary situations. This justifies the basic premise based on the necessity of their overall analysis and on the need for territorialised investigations.

Over time and at least for the studied period, even if the territories have evolved as a result of the heritage designation of the properties, the locations' attractiveness, and so on, the key words presiding over the changes in budgetary situations are continuity, inertia or stability rather than disruptions or bifurcations. The labelling, or labelling projects that have taken place in those years do not lead to any major upheavals. In connection with the recognition procedures and in dependence with local policies, we observe peaks in investment and, therefore, in indebtedness, more or less proportionate to the local budgets. These high points are generally followed by a return to a situation close to averages. Admittedly, according to the location, due to the constraints related to the availability of local wealth or due to a more or less pronounced involvement of

temporary resources, the effects of these efforts can be seen more or less lastingly or intensely.

As a result of these different dynamics and constraints, each configuration has specificities: an orientation towards expenses, manifest tensions, a persisting modesty of means, a resource diversification, and so on. These reveal the existence of various modes of adjustment, moving the sites and the local authorities composing them away from the average situation, to a greater or lesser extent. The site, the territory, and local policies bring in each case their particularities to the two-fold process which is more or less intense: the site contributes to the development of local resources, in particular through the fiscal valuation process; in return, the local authority and the territory are able to intervene in different ways in favour of the site.

It also appears that, except in specific situations, budgetary capacities are still available. However, it must be recognised, as shown by the typology, that local issues are highly diversified (a debt brake here, a weight or a limitation resulting from operating expenses elsewhere, against the backdrop of the greater or lesser abundance of the tax base...). Therefore, the room for manoeuvre in question is unequally distributed, with regard to territorial contexts and inherited situations.

Furthermore, it is restricted, particularly when it has been requested recently. The capacities of the communes and their intercommunalities are thus restrained, from the point of view of the building of new facilities and their operation. It seems difficult for these institutions to be able to go beyond the role they have already played, or are still playing, making them the first public investors. The reduction in State payments and the slower increase in local taxation, have already resulted in a downward trend in this area; recent indications tend to show that these lower local public investment dynamics seem to be well established.

This first part of the publication aims to measure the impact of outstanding heritage sites on territorial development, in light of the conceptual approaches used as guiding threads.

Indeed, these sites constitute public or common goods at the heart of multiple economic and environmental issues, but also social and cultural issues, which are crucial both for the State and for local authorities. Considering these particular properties as real territorial resources makes it possible to emphasise their outstandingness, their specificity and their development potential for the territory, while including the idea that the site's activation and appropriation by the stakeholders in the area (including citizens and tourists) go hand in hand with its enhancement, its preservation and finally its proper management. The notions of collective goods and resources therefore require us to replace the sites in their territorial context. This leads us to give precedence to a mixed (quantitative and qualitative) methodology to take account of field realities.

The economic and financial impact study could not be conducted in a generic and comprehensive way on the scale of the 70 outstanding sites identified in France. The problems, the issues, and therefore the impacts of the sites are to be differentiated according to the local contexts, whether it is in economic, financial or environmental terms. The typological analysis of the sites enabled the diversity of situations to be highlighted both at the site level and on the scale of the surrounding territories. Tourist sites can thus be situated in territories that are not touristic, some sites have no tourism appeal, others contribute to residential dynamics, etc. Based on a first socio-economic typology, it was possible to select seven study areas and to complete the profile of each of them with fiscal-financial elements to better identify local situations that are more or less favourable to a site's management, as well as the environmental constraints observed.

In a second chapter, the study of territorial dynamics provides several elements of response to the question raised. Thus, overall, the sites are rather dynamic spaces in territorial contexts that are also dynamic. We observe that these territorial groupings made up of a site and its periphery evolve in a rather similar way, with in particular a presence of tourist activities - and, more broadly, an economic structure that is geared towards

household demand - which enables them to absorb the shocks of the 2008 crisis. But it is especially the spatialised analysis, taking account of the specificities of the site in its local context, which provides the most interesting results. Three scenarios could thus be distinguished:

- first, and it is the most frequent case, a majority of sites contribute to the socio-economic dynamics of the territory. They constitute a resource, but a resource among others which can, under certain conditions, generate conflict or have its own limits (real estate pressure, low sharing of the income from tourism, competition with productive economic activities, economic specialisation that is detrimental to the territory's resilience, erosion of attractiveness, and so on);
- on the other hand, there are cases where neither the site nor the territory seem to be going well, as if the difficult situation of the territory were becoming in turn disadvantageous for the site, as outstanding as it may be. In those cases, the territory itself cannot be a resource for the site. This is the case in particular of sites situated in small or medium-sized towns in crisis;
- finally, although the previous scenario shows that there is no heritage miracle, some favourable signs are observed in territories that were until then extremely disadvantaged, particularly due to deindustrialisation processes. The outstanding heritage sites situated in these territories provide external income flows that are still relatively low, but already significant in terms of generating employment.

On the other hand, whereas the outstanding heritage site is, most of the time, a territorial economic development driver among others, financial impacts are not the same everywhere. Interdependencies differ according to the sites and their territories, and exchanges of practices are not all equally good...



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Thus, among the communes containing outstanding heritage sites, some are wealthy whereas others are less so. Like the situations, these levels of wealth show contrasting trends. From both the static and the dynamic points of view, there is no effect of the increase in value or surplus of tax bases that could be confidently attributed to the presence of the sites. Whereas this presence plays a role, the influence of the territorial context first appears as decisive.

This influence is particularly felt in terms of local taxation on economic activities. The revenues vary significantly according to economic development processes and the nature of existing activities (separating for example the rather urban/metropolitan-oriented fabrics, those with a marked productive orientation, those where sluggishness prevails...).

In connection with this, the levels and types of expenses are highly variable according to the location, and in particular according to the precedence of the site, its heritage recognition or its territorial consideration.

The local authorities of the sites have fiscal and financial profiles which, while being uneven, are fairly close to the models that apply to all the communes and intercommunalities, and marked in general by inertia. As for all of them, and for some more than for

others (those which are not very wealthy, those which have already heavily invested and borrowed...), their capacity to financially support ambitious policies is then at issue. These possibilities appear, if not always limited, often fragilised. The continuation of past trends seems to be jeopardised in this sense.

Unless we consider that the site itself may produce more resources for the territory... The avenues to that end are not imposed. Do weak signals appear locally in this way? Or unless we suppose that other public institutions take action, in a complementary way. Most of the departments are strangled financially; the regions are unevenly mobilised for territorial development and organisation. The constraints weighing on the State budget are strong. The future of co-financing, which is very frequent, is incredibly uncertain...

The remaining possibility is that investments, as well as the management of facilities that have been built, could be externalised towards third-party structures such as joint associations or private partners. As much as economic and/or financial models, it is a matter relating to the modes of governance of the sites. This leads us to emphasise again that the financial and management issues, just as the economic issues, and beyond those related to environmental and socio-cultural questions, deserve to be examined on a case by case basis, using more qualitative investigation methods. The second part of the publication sheds light on these issues, focusing on French and European areas.







PART 2

**OUTSTANDING  
HERITAGE SITES  
AND TERRITORIES:  
MEETING THE  
CHALLENGE OF  
A PEACEFUL  
RELATIONSHIP**



This second part, organised around several thematic entries, focuses on elements observed in the various study areas in France and Europe, referring to the tensions observable in outstanding heritage sites, but also to the possible paths towards balance and local compromises encountered or hoped for. The aim of this part is to review the concrete problems that arise in these outstanding heritage sites in terms of both governance and financial management in a first chapter. Solutions to resolve these problems and interesting cases of new and innovative practices are also discussed in order to propose concrete avenues for action to local actors to reconcile preservation, visitor attendance, fiscal and financial sustainability. The second chapter further analyses these heritage paradoxes by addressing the economic, landscape and socio-cultural issues. It presents economic innovation models aiming to diversify the functions of heritage sites, a sensitive approach to the subject through the notion of landscape as a possible mediator, and finally addresses the question of the sites' appropriation by the populations present, whether or not they are residents in the location.

All these results support the idea of reciprocal relationships between sites and territories, as it already appears in the first part. Whereas conventionally, the site is initially questioned as a resource for the territory, the inverse relationship seems equally important. Hence, the territory is in turn questioned in terms of its capacity to contribute to the dynamics, preservation and maintenance of the site.



CHAPTER 1

**GOVERNANCE AND  
MANAGEMENT  
OF OUTSTANDING  
HERITAGE SITES**

Philippe Estèbe  
Manon Loisel  
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In connection with the label awarding procedures to which they are subjected and the (upgradable) reference frame of values they must comply with, outstanding heritage sites raise questions in terms of governance. Their multi-territoriality, their extra-territorial character, the multiplicity of interests, and so on, increase tensions, compared to other territorial situations, especially since there is no recognised political authority to secure their future. These tensions manifest themselves at the various levels of development of these territories, whether they are economic, environmental or socio-cultural. How are the actors, nevertheless, able to 'govern' outstanding heritage sites? As an extension of this first question, how are financial choices operated and what is the room for manoeuvre for local actors to finance and maintain these collective goods? Finally, what type of economic development should be promoted and what project should be built to attempt to reconcile and enable the coexistence of issues, but also activities that are sometimes deemed to be conflicting? This chapter aims to respond to this type of questioning.

## The governance of outstanding heritage sites

The inherent dynamics of outstanding heritage confer upon them irreducible particularities. Nevertheless, a number of them subside or take a common turn under the weight of the process underway to obtain either the inscription or the label and then to conserve it.

For an outstanding site that is recognised under either of the two institutions studied here (UNESCO and Grands Sites de France), the labelling processes commit the local authorities hosting the site to varying and changing degrees: their governance is necessarily complex and composite. The managers' responses to the national survey conducted as part of this research programme illustrate the diversity of arrangements implemented locally.

In the case of most outstanding heritage sites (except, perhaps, Le Havre), one must indeed speak of governance, insofar as these areas are not a 'territory' in the political sense of the term. Indeed, they are systematically 'crossing' or 'transgressing': inso-

far as they are part of a historical, heritage, or natural continuity, they interfere with several jurisdictions, both horizontally (these sites literally straddle several political territories) and vertically, and mobilise a very diverse range of actors (NGOs, corporate bodies, residents, visitors, private enterprises, etc.).

Through their very complexity, these areas (or objects if we prefer) raise questions which challenge more generally the French territorial political-administrative system; in some cases, the solutions found can even appear as experiments which respond to contemporary questions regarding the political, social and economic models of local development.

Four propositions can thus contribute to giving an account of the issues raised by these objects:

- These areas, owing to their multiterritoriality, are indicators of the capacities and limits of the French territorial administration system;
- The absence of single political authority confers a central dimension to the management of stakeholders;
- The plurality of objectives and issues (preservation/enhancement...) of these areas raises the question of the economic management model;
- The vertical circulation of the issues in favour of the labelling or inscription and its perpetuation raises questions as to the role of the State in territorial affairs.

### **“Multiterritorial” areas**

Outstanding heritage sites obviously transcend institutional scopes, insofar as they are based not on a political-administrative logic, but on extra administrative criteria, such as natural, historical, landscape and heritage characteristics. They are not territories, in the narrow sense of the term, insofar as they do not correspond to an administrative unit, and even less to a political unit — with the notable exception of Le Havre — which would perfectly fit into the municipal and intercommunal jurisdiction.

In this sense, they are indicative of the capacity of territorial actors to move from the



local government to governance, in other words from a single structure, legitimised by universal suffrage (direct or indirect) to a more complex logic, whereby the power to act is based neither on legitimacy, nor on authority (nor even, often, on finance) but on the capacity to conclude agreements, arrangements within a rich and diverse territorial system which is poorly trained in more contractual forms of governance.

Specifically, outstanding heritage sites show how the State model has profoundly pervaded the political-administrative apparatus in France. State model is understood to mean two dimensions:

- A legal dimension, which confers a form of sovereignty at the local, in particular communal level (the famous “general jurisdiction clause” of local authorities) through a triple monopoly: monopoly of democratic legitimacy, monopoly of authority, monopoly on public action.
- A cultural dimension, which bases collective action on a principle of leadership, of presidential form (Juillard, 1976), sometimes leading to formal or informal coalitions (Dormois, 2006).

In the case of outstanding heritage sites, these traditional resources of the local power in France are most often absent. In most of them, the situation is even the opposite: profusion of political or administrative structures (communes, communities, intercommunal associations, parks, but also departmental councils, State services and specialised agencies, etc.) on the one hand, and an absence of obvious leadership on the other hand.

Since these resources are lacking, most institutional actors face an unprecedented situation which differs from the three classic scenarios: that of a single authority dedicated to territorial administration (commune or intercommunality), that of an ad hoc institution (as in the case of technical intercommunal associations managing water, sanitation or energy) and that of direct management by the State. Indeed, some RGSF sites are managed by joint associations, but the latter fail to impose themselves upon all the parties.

The French territorial political-administrative system is therefore challenged and the dynamics of the sites are in keeping with a logic of institutional, political and civil fragmentation. We note, however, strategies to transcend or circumvent this, to attempt to build forms of unity or alignment of the actors.

Fragmentation is the general context in which the question of the governance of outstanding heritage sites is raised. It is particularly marked in sites whose main characteristic is related to a landscape and environmental heritage: the Somme Bay, the Marais Poitevin, the Ochre Massif, and so on. But it is not absent from UNESCO sites such as the Canal du Midi and the Grotte Chauvet or even the Nord-Pas-de-Calais Mining Basin.

The fragmentation logic combines three levels:

- The classic political-administrative level with, in order of complexity: the Ochre Massif (10 communes, one intercommunality, a Regional Nature Park PNR); the Somme Bay (24 communes, 8 EPCIs, one joint association, one Country); the Marais Poitevin (93 communes, one joint association, one PNR, three departments, several EPCIs); the Grotte Chauvet and the Gorges of Ardèche (four communities of communes, two joint associations, one Country), the Canal du Midi (more than 50 communes and intercommunalities, three departments, etc.), 87 communes in the case of the Mining Basin...

- The level of the labels and ad hoc arrangements: the label Grand Site de France or the inclusion in UNESCO's world heritage list, as a recognition process, do not summarise alone the various protection processes<sup>47</sup> undergone by the sites; they follow more technical, essentially environmental logics: Natura 2000 areas, Sensitive Natural Areas, zones of interest for flora and fauna, avian protection zones, etc., as well as a zone for the protection of architectural, urban and landscape heritage (ZPPAUP) in the case of Le Havre.

- The level of specialised agencies: Coastal Conservation Authority (Somme Bay), Water Agency (Somme Bay, Marais Poitevin and Canal du Midi), Voies Navigables de France (VNF) (Canal du Midi) and the State services (Regional Directorate for Environ-

<sup>47</sup> In particular, all the labelled Grands Sites de France or the sites in the process of OGS are organised around their classification under the Law of 1930 (intended to protect remarkable landscapes).

ment, Development and Housing (DREAL) for the environment, Regional Office of Cultural Affairs (DRAC) for the cultural and heritage dimension).

This accumulation could appear as a resource; in practice, most often, it generates obstacles to the drawing up of a clear line which could be agreed upon by the various stakeholders.

The Marais Poitevin and the Canal du Midi are good examples of the multitude of instruments at play, correlative to a dilution of issues. Those relating to the management of water and/or waterways derive from procedures for integration of knowledge which are different from those relating to tree species. In the opinion of the stakeholders, this dispersion contributes to turning a number of outstanding heritage sites into procedure territories. The vision of what constitutes their unity, namely the landscape, is made problematical.

The instrumental dispersion also favours a sectoral management while environmental issues are often cross-cutting. More integrated management methods are emerging, however (Bawedin, 2013) in terms of coastal management/development for example, particularly in the Somme Bay. The great vulnerability of the territories near the coast significantly contributes to this.

Three main logics are deployed by the actors, to circumvent or transcend the structural fragmentation of the political-institutional context.

The first leads one to consider the labelling or inscription as an element of a more global strategy. In the sample, this logic is illustrated by the sites of Le Havre, of the Somme Bay and, to a lesser extent, of the Grotte Chauvet. In the case of Le Havre, the site has a unity of command, namely the city and the agglomeration community. The application to UNESCO then appears as one of the dimensions of a more global industrial and urban redevelopment strategy, correlated with various major projects. The function of the application to UNESCO, in this strategy, is two-fold: consolidating a tourism

offensive, by giving Le Havre a world-wide visibility; but also offering inhabitants of Le Havre a robust plan to build a feeling of belonging based on an identity which is all the stronger as it corresponds to a real image reversal.

This logic is also found in the Somme Bay, where the OGS is part of a comprehensive approach to local development, which has been backed for a long time by stakeholders from the 'Country'. The OGS approach is linked to other social, economic, and cultural initiatives with a view to reversing the image and giving a greater visibility to the Somme Bay area, a territory which is both rural and industrial. This is also the case of the cave known as Grotte Chauvet, where the UNESCO labelling recognises, supports and feeds into a rural local development approach with tourism playing an important role.

The second logic is based on a collective mobilisation to obtain the RGSF label or inscription on UNESCO's list of sites. We note several cases of this type. The most emblematic is that of the Nord-Pas-de-Calais Mining Basin.

The governance system emerges in the context of a political disarray, which marks the exhaustion or discredit of the socialist and (to a lesser extent) communist model of local management. This exhaustion is reflected in the rise in power of the Front National and, more generally, in the political disaffection of inhabitants. Led by a charismatic and 'visionary' actor, the local mobilisation for the site's inscription on UNESCO's world heritage list is part of a triple cultural revolution: turning over the image of the Mining Basin and restoring the pride of its inhabitants by showing that what bore negative values here can be recognised positively elsewhere; driving the mining territory out of its endless mourning to propose an alternative economic and social development model to the mining model (carbon-free economy VS coal, biodiversity VS mining pollution, initiatives VS the paternalistic redistributive model); finally breaking with the widely discredited historical model of local government. This mobilisation results in the creation of an original mechanism, namely the Mining Basin Mission, in charge of the facilitation and management of UNESCO properties.

The third logic of an 'upward' exit from fragmentation consists of cooperation to guarantee the sustainability of the site. It is illustrated, in a very buoyant context on the tourism side, by the Ochre Massif in the Vaucluse. The regional nature park (PNR) historically plays a federating role, but the site's management is itself very fragmented

and of varying quality according to the location. Indeed, the tourist attractiveness of the area is such that the various communes consider that there is no need to organise a common and global strategy. It is sufficient to be satisfied with a gathering economy to benefit from a considerable number of visitors, which can lead to a degradation of the sites (hence the Grand Site Operation). In this context, in the mid-1990s, a lateral actor, Okhra, emerged first in the form of an association, then of a cooperative (SCIC); it now brings together 200 members, individuals or institutions, around the aim of disseminating know-how in the area of colour. Supported by the PNR, Okhra played a major role, which demonstrated a federative capacity around economic activities and activities of general interest (visits, training, conservation, research).

Experiments conducted abroad, in particular that of the Fundación Valle Salado (Spain), illustrate how cooperation can be locally established, for the sake of both the site and the territory.

Valle Salado de Añana is one of the rare inland salt works that are still active in Spain. After a long period of abandonment, the salt works were partially restored, the salt production was revived and the site was opened to the public in the 1990s. To such an extent that in 2015, Valle Salado, a candidate to be included on the UNESCO list, welcomed 70,000 tourists and ensured its self-financing at 40%. This virtuous trajectory is in particular due to an original governance model, implemented by the Fundación Valle Salado.

The creation of this structure is partly the result of a strong gesture of solidarity on the part of the salt workers to put an end to the dispersion of land property which hampered the restoration. They transferred the ownership of the production areas and the usage of the salt water springs to the Foundation for 90 years, the springs remaining the property of the Association of Salt Workers. The project, led by the actors of this foundation since 2009, was to build a 'productive community' around the production of salt and the enhancement of its value.

This body has the particularity of ensuring the maintenance of the balance between the protection of natural areas and cultural know-how on the one hand, and tourist development of the site on the other hand. The Foundation's roadmap is centred around

three objectives: restoring and conserving the culture, both material and environmental, of the landscape to guarantee its sustainability, producing quality salt using traditional, ecological techniques which respect the ancient know-how of salt workers, and developing cultural initiatives, by opening the restoration site to the public, which fosters the economic, social and tourist development of the region.

The originality of the Fundación Valle Salado lies in its capacity to mobilise different public and private stakeholders, from administrative institutions and from the civil society, on different territorial scales (De Urrestarazu et al., 2015).

Since its creation, the Foundation is very involved politically. This is probably what makes it so dynamic and visible internationally. Lately, it has integrated the Slow Food movement (international network working for the right to quality food and for the promotion of short channels) and put in place a system of ambassadors mobilising the top chefs from Bilbao and San Sebastián.

The limit rests mainly in the fact that the governance is particularly sensitive to political changes. Since the creation of the Foundation, it has been headed successively by three directors, each of them deployed a specific dimension, and backed by the majority in charge of the decision<sup>48</sup>.

<sup>48</sup> See the article of El Diario Norte "PP accuses the Diputación of not respecting its own proposals in the Valle Salado", "PP acusa a la Diputación de Álava de "incumplir" su propio Código Ético", El Diario, 04/09/2015

### **Managing the stakeholders in the absence of a single political authority**

When the sites are outside a single government system, the question of the stakeholders takes on a central dimension in governance issues. These questions unfold on two levels: passers-by vs sedentary groups on the one hand; established interests within the site on the other hand.

By definition, these sites are open to the public and all have a tourist vocation (more or less pronounced). In a first formulation, the relationship between passers-by (visitors, tourists) and sedentary groups is expressed in the conventional terms of the debate between attractiveness and preservation, management of the site for tourism purposes, environmental and heritage quality. This conflict is strongly expressed in the case of the Ochre Massif, the Marais Poitevin and the Somme Bay. It is often the trigger for Grands Sites Operations, and its regulation is one of the constituent elements of the maintenance of the UNESCO inscription. However, this tension between passers-by and sedentary groups is not limited to this conflict of levels or values, it brings us to the more profound issue of the local public administration.

Indeed, the political-administrative system, at least in France, is built on the principle of sedentariness. Electors are those who reside in the commune. As a consequence, the relationship between passers-by and sedentary inhabitants is at the heart of the contradictions of local democracy. Elected officials, by definition, only speak to a fraction (often a minority) of the population actually present in their territory. Yet presence tends to play an increasing role in territorial dynamics, alongside residence. For whom do local institutions govern? This is the question raised in the case of some outstanding heritage sites. This is the case in the Ochre Massif, the Marais Poitevin, the Somme Bay or the Grotte Chauvet. In these territories, the issue of reception and hospitality poses a dilemma for the residents and stakeholders. The site and its residents should be protected, but the site should be widely open at the same time, insofar as the local economy depends on the spending of passers-by. Passers-by, in this case, are considered in an ambivalent way: as a source of income and as a source of nuisance. They are never









Salt works of the Valle Salado de Añana, © Manon Loisel

considered as one of the stakeholders and, in most cases, they are situated outside the scope of governance.

Yet, one might think that the involvement of passers-by (or some of them) in the site's management and development would make it possible, in some cases, to reduce the contradiction between the 'resource' function and the 'nuisance' function.

The experience of the Valle Salado de Añana, already mentioned, is an illustration of a possible association of passers-by with the preservation of the site, moderating the tension between the reception and protection functions.

By drawing on the experiment of the cathedral Santa Maria de Vitoria<sup>49</sup>, the Foundation Valle Salado put into practice an open restoration experiment. The site is renovated so as to make restoration compatible with salt production and guided visits. The principle is based on the fact of producing interactions between inhabitants, tourists and heritage by promoting accessibility during the restoration phase. A restoration site is thus open to the public. Thus, Valle Salado is a "living museum" (Lema Blanco, 2010) which is being gradually built, with the participation of students, inhabitants, but also international visitors wishing to participate in the restoration.

Most of the sites experience frictions or conflicts between the various interest groups, concerned in various ways by the site, its exploitation and/or its conservation. Here again, an important question appears, often concealed by the conventional institutional framework, due to the legitimacy and competences of the territorial institution (commune or intercommunality). In the absence of such an institution, as is often the case in outstanding heritage sites, various interests are directly voiced.

<sup>49</sup> Situated in Vitoria-Gasteiz, in the Basque Country, in Spain.

Thus, the French 'neo-corporatist' system, although it is declining in its overall capacity to structure society and public policies in France (Muller, 2004), plays a key role in many sites. Indeed, each established interest group tends to address the national authority which governs the relevant area: for farmers it is the corporatist agricultural system, for environmentalists it is the ministry in charge of ecology, for actors in tourism it is the ministry in charge of tourism, etc. Each group (which is not necessarily homogeneous) tends to seek out advantages for its own account, which is not always approved by the other stakeholders and does not necessarily correspond to the general interest of the site. Farmers can obtain subsidies for a relatively lucrative activity which is likely to put at risk the equilibrium of the ecosystem; in return, environmental associations apply pressure to obtain protection measures which can run counter to the farmers' interests, etc. These conflicts exist, or are latent, for example in the Marais Poitevin. Inhabitants can be disturbed by the development of tourist activity, which results in usage disturbance, the proliferation of car parks, rising house prices, etc. Hunters can claim rights which disturb the development of some tourist activities, etc. Such tensions are palpable in the Somme Bay, as well as in the Gorges of Ardèche.

In the Emscher valley (Emscherpark) in Germany, various initiatives have been deployed, easing these forms of tensions in whole or in part, and reconciling the interests involved. The Emscher valley has been regularly studied by planners and urban planners, in connection with the IBA (Internationale Bauausstellung) approach, experimented from 1989 to 1999. The "Internationale Bauausstellung" - which literally means "international building exhibition" - is a partnership-based approach, based on dozens of projects. The association, which is currently responsible for the follow-up of the IBA (Regionalverband Ruhr - RVR), intends to continue the process for the territory's reappropriation by inhabitants, by adding a participative dimension. It proposed in particular a series of workshops on urban agriculture, in order to involve farmers as activators of the natural heritage and to create relationships between the various users (inhabitants, students, tourists, and so on).

A digital discussion platform involving the owners of fallow land and actors wishing to exploit it is led by the RVR. The site, which has been activated for few months, has already enabled the achievement of fifteen or so cultural, associative and agricultural projects.

In France, regional nature parks (PNR) have, from their origin, this vocation to constitute a non-institutional mode of regulating the interests involved and the tensions between attractiveness and preservation.

The PNRs are peculiar in that they have no, or very little, institutional dimension. They have no, or very few, resources of their own: they are supplied by contributions from their members and national subsidies. Their investment budget depends on member local authorities, on the State and on European funds. The PNRs have no regulatory power either, at least not directly. It is with these limited institutional resources that the Parks must ensure the complex coordination of their missions of development and preservation/enhancement of the site's environmental resources.

The PNRs have two main levers for this. They are pluralist organisations, within which political institutions are represented, alongside other interest groups. The drawing up of the Park's charter is a process to produce compromise between these different parties. The charter is legally 'robust', since it is the subject of a public inquiry and of a deliberation within the territorial collectivities concerned. The stakes of a PNR lie in the ability of its (political and administrative) decision-making bodies to bring about a translation of the charter's orientations into the actions of the parties. It is an instrument (like the SCOT for example) for ensuring the consistency of the actions of its adherents.

Within the sample of study sites, the results of this formula are mixed. The Marais Poitevin Regional Nature Park, for example, lost its label for about ten years, owing to a significant reduction of the wet part of the marshland, a consequence of its incapacity to overcome the contradictions of national policies (intensive maize cultivation versus environmental protection) echoed in local tensions (farmers versus environmental associations). Ensuring consistency between the actors around a federating project enabled the Marais Poitevin to regain its label.

This opens a double debate (Baron, Lajarge, 2016). On the one hand, is the mission of PNRs not 'impossible', since it must articulate conflicting objectives, with no real trade-off capacity? On the other hand, rather than relying on consultation and consensus, would it not be more appropriate to give more autonomy and more regulatory and

financial means to the Parks (following the model of water agencies for example)?

Managing contradictions between two orders of objectives, equally desirable (preservation/enhancement and local development) is a common activity of territorial institutions. Nevertheless, the method for handling these contradictions is different. To handle them, the territorial institutions tap into their conventional resources to produce trade-offs. The PNRs, which do not have these resources, must go all the way with the controversies and tensions if they want orientations to be translated into the actions of their adherents.

The PNRs can also rely on a jurisprudence (EC, 25 June 2014) which states that the charters impose a duty of coherence on the signing parties. In other words, the charters do not have the power to authorise or prohibit an activity or an investment, but the public authorities must act in line with the charter they have signed. There is therefore an embryonic conventional governance which corresponds to the territorial issue raised by outstanding heritage sites, but which can also bring resources in other 'inter-territorial' areas.

The PNRs, which are found in most outstanding sites, are the most institutionalised formula, but it is not the only one. Here and there (and outside of France), new figures are emerging whose purpose is to constitute a collective around the notion of a common good. These figures seek to go beyond the system of tensions (preservation/enhancement, passers-by/sedentary groups, established interests /common interest) through innovative solutions. We can cite two of them, the Property Committees and the Cross-cutting Missions.

"The Property Committee has become a legitimate and uncontested body to ensure the maintenance of the property's universal value in connection with the actions included in the management plan." (Cortes, 2012).

In the case of Albi for example, the Property Committee relies upon a charter to achieve reciprocal agreements. The Canal du Midi also has such a Committee. A co-build-

ing process (workshops around major issues...), a partnership work (representatives of the State, of the Region, associations and actors of the economic world...) are being established and an (architectural, urban, landscape) Charter will define the main common guidelines chosen<sup>50</sup>.

The Cross-cutting Missions are another pooling formula. Within the Mining Basin, for example, there are a set of classification measures (under the historical monuments) and protection measures for heritage objects. They are assembled in a coherent form in a Heritage Charter of the united Mining Basin, which commits all the public and private partners of the property. The Mining Basin Mission, which has a cross-cutting technical organisation, is responsible for operationalising the charter and for implementing the management plan, which goes hand in hand with the inscription on the World Heritage list. In parallel, the setting up of a cross-cutting political authority, with the Conference of the Territories, must be confirmed and institutionalised; the financial and human resources allocated to the conservation of the property and its landscapes must be made permanent<sup>51</sup>.

<sup>50</sup> Source: <http://www.occitanie.developpement-durable.gouv.fr/le-premier-comite-de-bien-pour-le-Canal-du-midi-a22560.html>

<sup>51</sup> Source: <http://whc.unesco.org/fr/list/1360>

## Questioning the economic and legal model of territorial management

Given the values (multiple and difficult to reconcile) associated with the recognition of outstanding heritage sites, the fragmentation at play in the area of their governance, the question of the economic and legal model of the sites arises in acute form.

Even if the aim is, with the UNESCO or RGSF recognition, to federate the actors around the management of the property or projects concerning the site, this union is not always the order of the day. The sites of the cave known as Grotte Chauvet and the Combe d'Arc are a typical example of the growing number of responsible institutions, managers, and so on, and of the continuous searching for good arrangements. The sharing of tasks between political bodies, operational institution and facilitation structure is not simple, concerning the Mining Basin<sup>52</sup>. The coordination between all the procedures and their leaders poses a challenge in the Ochre Massif and it is difficult to designate a manager to be a real conductor. In the Marais Poitevin, the positions supported by some, their missions and initiatives, are sometimes unknown to others...

The prevailing institutional fragmentation is frequently invoked as being an obstacle to a real attractiveness: it can even be conducive to a superimposition of initiatives. Along the Canal du Midi, economic operators deplore the constraints imposed by the protection systems, hindering the establishment of activities (including when they are aimed at visitors) and their growth. But without preservation, the resource which is the Canal disappears...

<sup>52</sup> For a summary description of this organisation:  
<http://www.bassinminier-patrimoine-mondial.org/une-gouvernance-pour-gerer-un-label/>



With regard to the planned objectives in terms of visitor numbers in Ardèche, accommodation capacities are not sufficient. The local operators doubted that the site and the facsimile reconstruction of the cave known as Grotte Chauvet had the capacity to capture a new public; they have thus far not made any investments. Sometimes far from decision-making bodies or consultation schemes, these operators are in a fall-back or defensive position, faced with the concern that the process will benefit large external groups. Conversely, the proximity of the political systems and economic circles could in some cases let conflicts of interest emerge. Elsewhere (Ochre Massif), the private actors (SCIC Okhra), even if they play a major role, are not considered as legitimate to become real managers and participate institutionally in the future of the site.

Initiatives which imply a vision and a cross-cutting organisation, when they are held as favourable to development, such as mobility management, including when the aim is to promote soft solutions and limit the presence of vehicles, fail to enforce themselves, whether it is in the Somme Bay, in the Ochre Massif, near the Combe d'Arc...

Fragmentation is thus often, in one way or another, an obstacle not only to the site's operation in its territory, but also to the activation of the territorial resource.

The latter is in particular dependent on the current legal-economic model. Generally speaking, the enhancement and management of outstanding heritage sites largely depend on public funds. But as we have seen, in the absence of a single authority, the conventional economic model of territorial administration cannot be applied. Three main models emerge.

The first is a private weakly regulated model (Marais Poitevin, Somme Bay). In this case, the public authorities are called upon for the maintenance of the site; as such, its management remains public. The exploitation (tourism, hotel and restaurant sector) is left largely or increasingly to private initiative (hotels, bed and breakfasts, guest houses, cafés, restaurants, tour operators) without any particular regulatory intervention by public authorities. Tourist offices play the role of intermediary between tourism operators and tourists.





The second one is a model of public service delegation in specific cases where facilities, particular spaces, and so on, present in the site, lend themselves to a direct exploitation (visit of the facsimile reconstruction of the cave known as Grotte Chauvet, operation of the Mathieu factory in Roussillon). In some cases (the Ochre Massif), direct public management is also possible.

The third model is that of integration within a public body. This is obviously the case in Le Havre; it is also the case of the Mining Basin with the Mining Basin Mission, which is responsible for implementing the management plan; and it is a public interest grouping (GIP) project (dormant at present) for the whole Canal du Midi.

Those three models roughly cut across the two categories of sites, those listed in the RGSF on the one hand, and in UNESCO's world heritage on the other hand. But one should not rely on this hasty reading: the cave known as Grotte Chauvet is listed as a UNESCO world heritage site, which does not prevent it from using the lever of the public service delegation (DSP) for the commercial exploitation of the facsimile reconstruction of the cave; the situation of the Mining Basin and that of Le Havre are specific (great weakness of the private operators in one case, strong political integration in the other), the management of the Canal du Midi for the time being is essentially the responsibility of VNF which collects a tax on the Canal users, in particular cruise operators (we are, in this case, not very far from the model of the Marais Poitevin or the Somme Bay).

The management by public service delegation (*délégation de service public*, DSP) does not suit all situations. However, this model is interesting, insofar as it involves a form of public/private co-management<sup>53</sup>. Could we move towards more elaborate

<sup>53</sup> As is the practice in some cases, regarding 'macro-lots' in the urban production area.

forms of public-private cooperation, where the private company would play the role of co-designer, investor and operator (at least for a period of time)?

In actual fact, it appears that if we want to make the regulation between development objectives and environmental preservation/enhancement objectives more effective, it is imperative to associate private actors with the site's management, beyond the sharing of traditional investment/exploitation tasks. It is a general question which is facing public territorial management today, not only due to the difficulties of local public finances, but also because private or public actors acting in the economic sphere have an increasing number of territorial 'keys': financing capacity, collection and treatment of personal data (and therefore better targeting of facilities), know-how in terms of management, etc. Finally, local economic actors (farmers, tourism businesses, hoteliers, restaurant owners, artisans, carriers, etc.) must be able to share a form of collective interest. Whereas the DSP model cannot be applied everywhere, that of the SCIC could play a more extended role through the flexibility it allows and especially through the diversity of partnerships that it promotes.

Beyond the question of the legal-economic model in effect – or in tension – for the activation of the resource, there is an actor which all the sites must count with, namely the State. Beyond the mere classification, labelling or inscription procedure (see above), the central State remains very present in the management of outstanding heritage sites, both directly and indirectly.

It is directly present through its decentralised services — Prefecture, DREAL, DRAC, DRAF in particular — and agencies — VNF, water agencies, Coastal Conservation Authority, etc. This presence is therefore multiple and sometimes contradictory between environmental police imperatives, territorial development issues or cultural and tourism policy objectives. The objective of “coherence” set by the Council of State for State actions is sometimes difficult to attain, given the still very large number of schemes, conventions, and rules which require the intervention of State representatives. The temporal horizon for this territorial coherence is continually extended, since in reality, the Prefect has only a limited authority.

In French tradition, this horizontal presence is often accompanied by the vertical or-

ganisation of powers, which ensures a relaying of the issues and problems to the detriment of local capacities for regulation and arbitration. This verticality is reflected in three mechanisms.

The first one lies in the neocorporatism already mentioned, which enables some professions or certain actors to directly address the central authority, by going over the heads of the local representatives of the State to seek legitimacy and arbitration directly at the source.

The second mechanism consists in the call for projects, which has become the favourite instrument of public policies (Epstein, 2005) over the past ten years or so. This technique can have mobilising virtues. It can also considerably undermine the local capacity to handle the inherent tensions and contradictions in the management of complex and fragile areas such as outstanding heritage sites.

Finally, the mission, which is sometimes considered as the last recourse, is a third form of verticality. It consists of sending national inspectors into the field, to make recommendations to relaunch a locally blocked process. This solution is a facility which is sometimes used by local political actors, but there is no assurance that it will not end up adding difficulties to those already present locally.

A political culture cannot be changed in a few years, but we can see in this fragile governance context the limits of what remains of 'colbertism'.

Finally, the outstandingness of the sites, if only because they do not fit well with the usual territorial limits and their powers of representation, gives rise in turn to a certain outstandingness of their mode of government, or of their governance. These sites and their territories condense in themselves a range of issues and sharpen the questions facing ordinary territories. What solutions can be found for them, given the strength of the existing paradigms?

These could finally be envisaged according to a double structuring.

A first axis would be related to the intended integration and its intensity. Where do we stand, or do we plan to stand, between a slight and little formalised involvement (association) of stakeholders, adapting to the issues and evolving according to the









course which is being pursued by the site, and a dedicated structure based on an integration defined a priori? The association formula has the advantage of adaptability, that of gradual enrolment possibilities; its relative lack of formalism makes it contingent, dependent on goodwill. The example of the Añana Salt Valley, of the flexible and progressive, or even integrative, implementation of initiatives shows, nevertheless, that the formula can be conclusive. The dedicated structure modality is more frequent and more in line with our operating mode and its formalism. The Joint Associations would be similar, as well as the mode of mobilisation and action chosen for Emscher Park. The permanence and the capacity to mobilise resources in the pursuit of the objectives are clearly present; the initial structuring is poorly suited to a (strong) association with the stakeholders whose initiatives gradually emerge, when the outstanding site asserts itself, evolves in its rehabilitation or enhancement trajectory.

A second axis of differentiation and structuring, orthogonal to the first axis and necessarily completing it, is related to the temporality of the action logic. What logic predominates? Is it that of the project, of the short term aiming at reconciling preservation and transformation, or even a restoration logic? Or is the aim a long-term transformation, around the resource which is the site and its territory, and its activation? In the Añana Valley as in Emscher Park, these temporal logics have intersected one another, whether explicitly or not. Nevertheless, the clarification of these horizons is a prerequisite, or a must since it involves mobilisations which are not the same.

The different areas are positioned and evolve along those two axes, between these various polarities. In the face of their diversity, no model can or seems to stand out a priori. Can we then start from a postulate of trust, based on the principle that the territories and their heritage sites have the capacity to find arrangements that are appropriate for them? Would this be true however for all the territorial systems?

The effectiveness of the current or future arrangements would be translated at least in part into the methods in place for managing fiscal and financial resources. What is the case in this respect? Is the outstandingness of the modes of governance accompanied by an outstandingness of management issues? In practice, what solutions are found on



the ground in terms of means mobilisation, faced with the imperative of needs and in light of the territorial and political fragmentation?

### **New and common fiscal and financial management methods**

One of the selection criteria for the study sites lay in the diversity of their fiscal and financial situations (see above). In actual fact, almost regardless of the specific case, the interviews and field investigations suggest an increasing pressure of expenses to maintain the qualities which led to the inscription (Canal du Midi...) or to the labelling (Marais Poitevin...), whether on the budgets of local authorities or on those of the managers. Frequently, the question arises as to the method of managing the facilities underlying the attractiveness of the sites or dependent on tourist numbers. It becomes particularly acute when there is a clear need for adaptation in the face of the tightening-up of public budgets (Somme Bay...) or when assessing the solution adopted in terms of externalisation (Pont d'Arc Cavern...).

These problems, relating to the economic and financial models driving the delivery of local goods and services, are not specific to the local authorities containing outstanding heritage sites. They are on the contrary practically shared by all the local institutions, for activities falling within their spheres of competence (Guirou, 2015). There as elsewhere, they take on a special significance under the weight of the constraints of austerity and rigour which affect local public budgets (Gourgues, Houser, 2017) in conjunction with the increasingly close association of local authorities with the restoration of public accounts. Moreover, more than one-quarter of the respondents to the questionnaire launched at national level consider that the financial situation of the management entity is declining (RGSF sites) and is facing difficulties (UNESCO properties). The tensions are therefore in all likelihood severe for actors involved in the financing and management of outstanding heritage sites. They are likely to be exceptional in the face of local issues. If only because the proper operation of the facilities present determines the future of the site itself. The mobilisation and management of resources accordingly, and the associated representations, are therefore central.

What then are the major constraints that appear in these sites, in fiscal and financial terms? What modes of action are implemented not only to mobilise (rare) resources for the benefit of the site itself, but also to make adjustments to cope with the rarefaction of those means, given the rising costs? In return, what practices do we observe to capture financial resources from the actors who take advantage of the presence of outstanding properties? Do these levers have some effectiveness in addressing the tensions that arise, in relation to the challenges facing the sites in terms of economic development, environment, as well as on the socio-cultural level?

Various elements of response to these questions are provided, based on the comments made by the actors during the field studies, on the information they submitted and that collected as a supplement.

It is not always easy to disentangle, from a budgetary or management point of view, what is specific to the sites, and what would as such give them an outstanding character. Indeed, they share common features with the other territorial groupings, related to the modes of budgetary organisation and standardisation in the area, to the operating methods of the fiscal and financial system, and so on. Those shared features generate a certain uniformity of situations (PMinson, Reignier, 2012). Conversely, the local political choices and the weight of the territorial contexts are a source of differentiations (Gilbert, Guengant, 2002). The local authorities concerned are therefore at once similar and different from the others. Hence, they can be considered as indicators exacerbating common features and as specific cases with their own tensions, stemming from territorial and heritage issues specifically facing local representatives.

In any event, the building of a specific assessment of the financial issues of outstanding heritage sites comes up against a knowledge objectivisation and production issue. The assessment of the level and particularities of site-related expenses, that of the positioning in relation to what prevails in common situations would require the ability to aggregate the budgetary data of all the entities concerned by these sites, from the local authorities to the managers themselves. This information is kept in very different



accounting frameworks which are not always compatible. The entities involved rarely keep analytical accounts, which would make it possible to establish the effective cost of each task they perform and, more specifically, of what pertains to their actions related to the outstanding site. In the absence of such informative materials, nothing indicates that the realities taken into consideration are really outstanding...

### **A financial management that is also fragmented**

The particularities of the very modes of governance of outstanding heritage sites will be reflected in their financial management methods, and finally in the fragmentation of this management. The sites are often multi-territorial, and therefore have no single political authority to govern them. Furthermore, owing to the inscription or labelling procedures, the designation of a managing entity becomes an obligation. In a more or less intense relationship of exteriority with the stakeholder institutions, this entity, which is frequently created ad hoc, assumes responsibility for the future of the site's financial interests and of the elements composing it. The various economic models of the stakeholders, which have their own logics, must then reach an agreement around partially common goals. What tensions can make this particular conjunction emerge?

They result from the difficulty of reconciling interests that are partly common, and partly separate. Including when the configuration appears as the simplest (that of the properties circumscribed to within an urban area, as for Le Havre for example), the management bodies and the financing channels are composite. Both the city and the agglomeration are able to intervene financially, as well as the departmental or regional council. The complexity increases when there is an 'interlocking' of local authorities with overlapping competences. Each intervention by a local authority acquires a legitimacy, if only because it guarantees a certain visibility, a right to scrutinise with regard to what happens in its territory. Its own budgetary constraints however lead it to limit its financial contributions. The logic behind the representation of each local authority in the actions and behind the formation of expenses, is not necessarily the same as that which guides the provision of means.

The organisation and the source of funds often become more complex, in connection with the nature of the site and its multiple public ownership (Canal du Midi...), its composition and the issues it raises (Mining Basin...), with its genesis and the particularities of the territorial context (Somme Bay...).

The State itself cannot disregard financially the management of outstanding heritage sites with a national or international vocation, especially since these objects are at the heart of its sectoral or land use planning policies. Moreover, regardless of its effective participation, it is mentioned by the managers of the surveyed sites as a major financier, both for the properties listed as world heritage and for the sites recognised under the RGSF.

On behalf of the missions entrusted to it, the managing entity is responsible for collecting from the multiple stakeholders present the funds needed for the site and for the common projects. However, it does not have the enforcement power, and in particular the taxation power, which only the governments have. Yet the tax-based resources are essential when it comes to goods with a strong public character (see above).

For setting up and carrying out the projects, the managing entity is therefore dependent on financing rounds involving its members, alongside possible partners. The local stakeholders stress how difficult it is to reconcile the various logics. Nothing guarantees the sustainability of the compromises established at some point. Electoral deadlines, policy changes and changes in majorities imply an exposure to uncertainties concerning the availability of financial means. For example, this was the case in the Somme Bay and for the Gorges of Ardèche. Political backing (Mining Basin for example) is indeed often a decisive factor in resource mobilisation. Such facts commonly punctuate the current affairs of local authorities and their budget management. They are crucial, in the case of outstanding heritage sites, since the preservation of heritage properties as well as the recognition procedures are medium-term and even long-term processes, therefore implying continuity in actions.

A way of formalising arrangements and strengthening the funding more or less sustainably consists in the creation of a Joint Association (*Syndicat mixte*). It is the most frequent solution, in particular for sites with the RGSF label. Whether or not it takes this form, the managing entity is placed *de facto* in a financial dependence on its members, for the partial exercise of powers they have devolved to it.

The (financial) cooperation enables the grouping to have resources for exercising its missions. It generates, *inter alia*, a “zoo effect”<sup>54</sup>: each member of the grouping benefits from actions financed by all the members and which it would not be able to carry out alone, owing to the limited size of its budget. The small communes of the Somme Bay, for example, would not be able to gather the funds needed for the infrastructure and amenities required by the site.

The budget of Joint Associations is dependent on the contributions of their adherents. The amounts of these contributions are set with the association’s statutes which also establish the powers vested in the association. Implicitly, through the funds provided by each of the members to the common action, institutional and political positions assert themselves. Indeed, “through co-financing, it is money both as an instrument for rational or management action and as a display of a public authority’s relative power which is at stake” (Gilbert, Thoenig, 1999). For example, the Departmental Council of Picardy is the main contributor to the budget of the Joint Association Baie de Somme – Grand Littoral Picard (Somme Bay - Picardy coast), the manager of the RGSF site. It is acknowledged that its representatives drive the main orientations of the Association (Regional Chamber of Accounts, 2013). This is consequential to a lesser involvement of the member communes, which have moreover long been distant from this institution, considered as a creation of the State. This could still be considered as creating or encouraging a differentiation process with respect to the future of the outstanding

<sup>54</sup> The expression is taken from Oates (1988). For more details on that matter: Quentin Frère et al., 2011, “The range of local public services and population size: Is there a ‘zoo effect’ in French jurisdictions?”, *Recherches économiques de Louvain*, 2011/2 (Vol. 77), pp. 87-104.







site... On the side of La Combe d'Arc, municipal representatives fear that the power of representation within the Association in charge of the OGS will now be proportionate to the members' financial contributions.

The free setting of these contributions from the members to the association's budget results from the production of the local rule (Gaudin, 2014) often resulting from tough or long negotiations, and entailing the risk of being locked in a procedural logic. Among other things, statutory revisions could not be too frequent. The formula has the advantage of adaptation to territorial realities. It also has disadvantages, including that of a loss of legitimacy (in particular democratic legitimacy) and of constantly being called into question. Frequently, in the sites studied, the actors report dissatisfactions stemming from the asymmetry of roles, costs and benefits between the Association and its members. This distancing brings about a form of disempowerment, running counter to what is at the basis of a decentralised system in which the evolution of costs and that of their financing should be proportionate (Derycke, Gilbert, 1988). Ultimately, the local authorities, and in particular the communes as the main beneficiaries of local taxation, are the winners, in terms of returns on taxes and returns on investments made by the Association, generating a surplus of attractiveness and/or of local development. Their contributions to the Association are often low with respect to their own budget. The contestation applies even when the rules are formalised in the statutes of intercommunalities with their own tax system, when they intervene (in the Ochre Massif for example). The alternatives, between intercommunalisation of communes and communalisation of the intercommunal institution (Le Saout, Segas, 2011) could also govern interrelations between localities and Joint Associations.

For development actions, investment projects, and so on, there as elsewhere (Cornu, Gilbert, 2001), public co-financing, or joint financing, are the rule. Such modalities consolidate inter-territorial actions. Nevertheless, they result in chain effects: the con-

straints affecting some will affect others. Thus, the local public investment expenses of communes and their intercommunalities are now less subsidised by the departments, which are facing serious financial difficulties (OFL, 2016). The departments largely contribute to the budgets of the sites' managing entities, as highlighted by the survey conducted at national level. Under the weight of these dependencies, local public investments in outstanding heritage sites could be affected...

Political logics and administrative and technical cultures lead in many cases to investments, the symbolic weight of which is major, being favoured (Offner, 2014). Less attention is paid to recurring operating costs, although they are indispensable to the continuity of actions and services, and are predominant in the budgets (OFL, 2016). This imbalance is problematic for outstanding sites, since the continuity of their existence and their maintenance are strict requirements.

The practices of the sites' Joint Associations or managing entities are driven by project, local public investment and development logics (they are essential in the case of OGSs for example). This may suggest a certain instrumentation of the recognition/and or labelling to mobilise resources. In the interviews (Mining Basin, Somme Bay, Marais Poitevin...), it was recognised that the label acts as a business card, to which financiers are sensitive (from the European Community to communities of all levels). When the local resources are limited, the OGS is sometimes even considered as a saving mechanism.

In parallel, the actors reported several times (Somme Bay, Combe d'Arc, Canal du Midi, Marais Poitevin,...) difficulties regarding the permanent mobilisation of means to allow for the full benefits of achieved infrastructures and/or amenities to be reaped, and to ensure their general maintenance. The divisions in the public ownership of the properties and, therefore, in the resulting costs, exacerbate the difficulties. Thus, for example, strong uncertainties appear concerning the properties which form part of the Canal du Midi and those located in the vicinity. The navigable Canal, the rivers and their dependencies (towpaths, ports, lock keeper houses, etc.) are part of the State's public fluvial domain (Domaine Public Fluvial, DPF); this domain is managed by VNF, through the Service de la Navigation du Sud-Ouest (SNSO). VNF collects in return the taxes related to the works and the fees from the uses by private or public persons. Riverside local authorities have established a joint management agreement with VNF; it sets their scope of intervention on the stretch of canal (maintenance of the banks, tourist developments, and so on). The creation of green ways along the Canal falls within the scope of the (financial) intervention of the departments crossed. Whereas a certain convergence is established during the project procedures, it is difficult for it to persist over time. In this context of fragmentation, the amenities present, the state of maintenance, etc., are unequal, depending on the will and means of each actor for their assigned tasks. The fragmentation of roles is not conducive to an efficient and sustainable use of available funds.

### **Means activated to deal with “outstanding” situations**

Most of the local authorities concerned by outstanding heritage sites are subject to the conditions of the ordinary fiscal and financial regime of local authorities. Hence, like all of them, they are dependent on the current reforms aimed at reducing the flaws of the tax regime and tax sharing. In parallel with these ordinary situations, there are resources which can be activated in contexts showing a certain outstandingness. Such is the case of the tourist tax, benefiting localities with high tourist numbers (exceptional,



compared to averages) as well as the departmental tax for sensitive natural areas (Taxe Départementale pour Espaces Naturels Sensibles, TDENS) used by the departments for specific actions (exceptional, from the standpoint of the competences and the general vocation of departmental councils<sup>55</sup>). Particular attention is paid to these two fiscal mechanisms, the importance of which was mentioned in the field studies. Their general regime is therefore evoked as well as the specific questions they raise. More broadly, they echo the interest and the effectiveness that specific fiscal instruments (relating to certain uses, at work in some territories) may have compared to taxation tools with a general vocation.

One of the questions raised by the tourist tax lies in the coherence of the provisions governing it and in the proportionality of its revenues with respect to the issues which justify its introduction. The French local taxation is largely based on property tax bases. For historical and political reasons, and also out of considerations of efficiency or equity, the taxation is paid by those who reside (housing tax), hold properties (property taxes), and do business permanently (economic contributions). The usual mechanisms barely tackle, or poorly tackle, activities due to intermittent presence, short stays, and so on. The indirect taxation of acts of consumption and presential activities is no longer in place. The tourist tax, established in 1910, is almost the only mechanism of this type.

Its revenue is collected from persons staying in their territory on behalf of the communes and/or intercommunalities. It must allow these local authorities to finance expenses related to tourist numbers or to the protection of their natural areas for the purpose of tourism, by making those who generate these expenses, and/or benefit from them, pay. These visitors pay what they owe, according to the duration of the stay, when settling the invoice for their accommodation. The revenue is therefore collected by the hosts on a declaratory basis.

<sup>55</sup> Within the framework of the taxation and urban planning reform, the departmental tax of sensitive natural areas (Taxe Départementale des Espaces Naturels Sensibles, TDENS) was replaced by the sensitive natural area development tax (Taxe d'aménagement des Espaces Naturels Sensibles, TAENS). The taxation principles remain largely unchanged.

Firstly, based on the detailed data communicated by the Public Finances General Directorate (Direction Générale des Finances Publiques, DGFIP) and related to each of the local authorities concerned, it can be seen that the overall revenue from the tourist tax is very low, compared to the resources from local taxation<sup>56</sup>. Secondly, it appears that the tax concerns intercommunal groupings including outstanding heritage sites to a lesser extent than the others (Table 14). It is not excluded that the lower productivity of the tax in these locations is due to collection difficulties.

Table 14: Amounts collected on account of the tourist tax, communes and intercommunalities (of outstanding heritage sites and others), Mainland France, 2015, in million € and in % of the total

Source: Drawn up by the authors based on DGFIP and Insee, 2016

	nb communes	in % total	pop 2013	in % total	TT amount	in % total
sites (including Paris)	2657	17%	11.0	30%	101.2	35%
sites (without Paris)	2656	17%	8.8	24%	35.5	12%
other	13,013	83%	26.0	70%	176.4	61%
total	15,670	100%	37.0	100%	289,5	100%

Indeed, in Ardèche for example, the actors met consider that the amounts collected are well below the potential amounts, given the accommodation capacities and the visitors welcomed. The revenues are poorly collected due to the lack of awareness raising measures, and the absence of a control mechanism is deplored. Those in charge of tourism development have proposed a modelling to the actors in the sector, showing the existing differences as well as the scope for progress.

<sup>56</sup> In 2013, its amount reached €0.25 billion while that of all the taxes collected by local authorities reached nearly €126 billion. In 2015, the tax was practised in 2374 communes and returned nearly €219 million; it was in force in 740 intercommunalities with their own tax system (bringing together 13,328 communes) for a revenue reaching about €73 million.

Table 15: Unit tariffs, tourist tax, selected sites, 2015

Source: Drawn up by the authors using the information base on the tourist tax, <http://www.taxesejour.fr/centre-ressources-sur-la-taxe-de-sejour-en-france/presentation-de-la-taxe-de-sejour-en-france/#une-taxe-differente-par-territoire>

Study area sites	tariffs 2015, in € per night per person				
	Commune or EPCI	Palaces and equivalent	Tourist hotels 2-star and equivalent	Campsites and equivalent	Period of collection
Ochre Massif	CC Pays d'Apt Lubéron	2.00	0.40	0.20	from 1/04 to 31/10**
Grotte Chauvet and Gorges of Ardèche	CC of Gorges of Ardèche	1.36	0.82	0.20	from 1/01 to 31/12
Canal du Midi	CC Castelnaudary Lauragais Audois	0.65	0.30	0.20	from 1/04 to 31/10
	CA Béziers Mediterranean	2.00	0.90	0.20	from 1/01 to 31/12
Marais Poitevin	CC Vendée Sèvre Autise	2.00	0.60	0.20	from 1/05 to 30/09
Somme Bay	Joint Association Somme Bay	-	0.80	0.20 to 0.48*	not specified
Le Havre	CA Le Havre	4.00	0.90	0.55	not specified
Mining Basin	Marchiennes	-	0.61	0.30	not specified
floor/ceiling tariffs		0.65/4.00	0.30/0.90	0.20	

Notes: unless otherwise specified (\* = flat rate scheme), they are the tariffs of the tax under the actual regime; \*\* = i.e. 214 nights.

Thirdly, we can see that local practices are very diversified, as shown by the tariffs used locally, for a few examples taken within the selected study areas (Table 15). The variations are consistent with the tax regime: its establishment is facultative; within ranges fixed at national level, the competent elected officials have the ability to set the annual rates, the collection duration, and so on, applicable in their locality. Nevertheless, the large differences observed raise questions as regards the possible reconciliation between compliance with the principle of local autonomy and that of the equal treatment of taxpayers.

Most often, the sums collected from the tax are allocated for the benefit of the (intercommunal) tourism office and do not directly enter into the communal and/or intercommunal budget. Nevertheless, a way of giving an account of their significance is to relate them to the investment expenses of the local authority concerned: what share would have been covered by the tax?

In most of the cases, this proportion is low (less than 1% for the agglomeration community (CA) of the Region of Le Havre, nearly 2% for the CA Béziers Mediterranean...). Such is the case mainly in urban environments and when the property represents only one heritage element among others, or when it constitutes only one of the terms of territorial development. On the other hand, its weight is significantly higher (nearly 30% for the community of communes (CC) of the Gorges of Ardèche), in contexts where tourism development and the presence of the properties are primordial. In this context of stronger dependence, the elements of the taxation scheme, in terms of efficiency and equity, take on all their importance.

Table 16: Tourist tax revenues, outstanding heritage sites and others, 2015, various indicators

Source: Drawn up by the authors based on DGFIP (individual data) and Insee, 2016

	Revenue (communes and/or EPCI), in million €	relative weight of sites (excluding Paris)	nb communes isolated or grouped	pop 2013, in millions of inhab	revenue, in € per capita	accommodation capacity, in millions of units	revenue, in €/accommodation unit
subtotal sites	113.0	39%	2657	11.0	10.27	0.382	296
subtotal sites excluding Paris	47.4	16%	2656	8.8	5.40	0.296	160
other	176.4	61%	13,013	26.0	6.80	1.149	154
Total	289.5	100%	15,670	37.0	7.83	1.531	189

Note: the accommodation units are within the meaning of Insee on the occasion of the census carried out

On average and from the point of view of unit revenues (obtained by relating the amounts collected to the resident populations on the one hand, and to accommodation capacities on the other hand), the (communes and intercommunalities of the) sites are not the best placed (Table 16). These indications are however fragile because variations between sites are strong<sup>57</sup>. Whereas the fiscal contribution of a tourist is dependent on collection practices, it also appears to be strongly dependent on the territorial context.

The tourist tax has been subject to many criticisms. The current obstacles related to its regime are such that a high number of local authorities that are potential beneficiaries of the tax are reluctant to establish it. In particular, whereas small communes do not have sufficient capacities to carry out all of the controls required concerning the collection of the tax, the return is insufficient for the larger ones to invest in this area.

In the face of these flaws, a number of reform proposals have been formulated (DGCL, DGE, 2014). The objectives consist in improving the returns, reducing the disparities between local authorities, between collectors and between taxpayers. One of the difficulties of a major change is related to a strong local attachment to this mode of taxation: it is “as close to the field as possible” and the actors concerned want this to remain so. What place should be given to professionals in the mechanism? In any event, it would be difficult to seek a balance between the revenues collected from tourists, visitors, holidaymakers, and so on, and the expenses arising from their presence for the local authority, apart from raising the tax and making its collection even more difficult. Whatever happens, tourism-related expenses also benefit permanent residents: the taxes paid by the latter have their place. For the tourist tax, one of the challenges would rather consist, according to the authors (DGCL, DGE, 2014) in reducing inequality of treatment and, in particular, in avoiding a situation where too large a number of tax-

<sup>57</sup> The revenues range from €0.03 per capita for the sites of the Vézère valley (the total amount collected is low) to more than €116 per capita for the Gulf of Porto (the site having a low resident population). They range from €0.23/accommodation unit for the sites of the Vézère valley to €429/accommodation unit in Chartres (the recorded accommodation capacities of the commune being low).

payers escape the payment of what they owe, and/or that the tariffs practised are not proportionate to the contributive capacities of these taxpayers. The flaws observed are inherent in indirect taxation, which affects consumption. As designed, or reformed, the tourist tax can hardly avoid them...

The introduction of the Departmental Tax for Sensitive Natural Areas (TDNES), specific to certain uses and contexts, also raises a number of questions.

Its principle is the following: in order to finance its policy for the protection, management and opening to the public of sensitive natural areas, the departmental council has (had) the opportunity to introduce a Departmental Tax for Sensitive Natural Areas. The (indirect) tax works like a prior flat-rate compensation. It is paid by those who build or develop, according to the value of the property completed. It is as if this achievement caused injury (systematically) to the state of natural resources, protected or to be protected, regardless of the actual damage that this achievement will produce.

The collected revenue is modest, compared to the departmental tax resources (slightly more than €200 million, compared to a total of nearly €41 billion in 2014). It can therefore only contribute to financing a reduced part of the actions of departments. That does not exclude, of course, that in specific cases, taxation revenues were a lever to define and put in place real protection policies, as well as policies for the enhancement of natural areas.

The use of this form of taxation was for example explicitly mentioned in two study areas: the Mining Basin and the Combe Pont d'Arc. It enabled massive land acquisitions in the North and in Pas-de-Calais, in conjunction with the public land management institution (Établissement Public Foncier) and especially the acquisition of slag heaps; the importance of brownfields and the weight of implementation costs currently lead this action lever to be reconsidered downwards. In Ardèche, the tax revenue has contributed, among other things, to essential acquisitions for the preservation of the site, recognised under the OGS; whereas this contribution is fundamental, the issue of raising the funds needed to conduct the whole project remains, especially since the tax is only

used for financing investment expenses. In both cases, it's not just the level of revenues compared to the needs, but also their use and their allocation for precise purposes, that are in question. This allocation implies the consent of the communes and intercommunalities concerned. The use of the funds is then dependent on the modalities of local governance, within and outside the scopes of the outstanding heritage sites (Lenclos, 1997). The overlapping of the scopes, their mismatch (regarding the administrative limits and those of protected areas) sometimes leads to the abandonment of a strategic vision by the department, in favour of individualised management plans, as close as possible to communal realities. Consequently, this leads it to divide up the use of financial means. The multiplicity of fiscal instruments, in a fragmented institutional context, is not straightforward.

It appears that the two 'outstanding' resources mentioned above have reduced qualities. By construction, indirect taxes on the product to which they relate can only serve a limited purpose. Their use in multi-territorial and multi-partnership organisations makes matters more complex. In a period of strict budgetary constraints, there might be a strong temptation to create new 'exceptional' fiscal instruments, to respond to financial needs, themselves considered exceptional. Given the limitations of existing tools, there are doubts about the potential of such additional mechanisms.

### **Inter-thematic tensions in terms of financial dimensions**

Do the financial and management issues faced by local authorities or institutions managing outstanding heritage sites lead to tensions with the purposes of their actions in terms of economic development, environment or at the socio-cultural level?

The field studies show the absence of symmetry between the local fiscal system and the territorial development processes, already identified by the overall quantitative analyses. One of the reasons for the mismatch comes from the disconnection between the values of the tax bases serving the taxation allocated to local authorities and the real values of the properties, between each other's respective evolution. Locally, the increase of the bases is related to the net flow of constructions. Since the pace of the latter is moderate, the evolution of taxable sources stems mainly from the flat-rate up-



date of values to which all the properties are subjected. The (localised) effects of a rise in price, just like the losses in value, are not directly perceptible through the amounts collected.

Another major reason for the disconnection is related to the composition of the fiscal basket available to the local authorities and its changes. In particular, the fiscal reform in 2010 has profoundly changed it. Through the CVAE (see above) for example, the taxes of local authorities are becoming increasingly administered. The fiscal compensations introduced to maintain the previous situations induce an inertia in the mechanism, while letting existing inequalities persist.

Under the influence of these various factors, the links between local taxation, the territorial context and its own dynamics, its evolution due to development policies, actions to attract households and/or businesses, and so on, are gradually eroded. The result in return may be a certain lack of voluntarism on the part of local decision-makers, when it comes to setting up such initiatives, especially if they are sources of costs.

The interlocutors met often mentioned this near indifference of fiscal dynamics to the increase in the values of residential properties in connection with the heritage process, with the labelling, with the number of visitors or with their changes of vocation. Simultaneously, they stressed the differences, in terms of wealth and costs, between the local authority they administer and the surrounding ones. Inequalities presiding over the sharing of resources between local authorities of various levels were also frequently evoked. The representations at work are not favourable to the emergence of shared development strategies and/or policies.

Another level of tensions appears when the issues related to financial management and prevalent environmental issues are put into perspective. The quality of the environment, the landscape dimensions, and so on, are at the very foundation of the recognition and attractiveness of the sites. Yet their preservation is often costly.

In the Somme Bay, questions emerge: should the Bay be dredged at great expense and should its current image be maintained, when the public budgets are tight, or should one let nature take its course and recover its rights? In the Marais Poitevin, the maintenance of landscape and identity aspects poses a problem, due to the weight of the means required. Not maintaining these qualities means adversely affecting the heritage value of the locations, which attracts visitors and which is in part a vector of territorial development.

In connection with the tightening up of the constraints weighing on public finances, with the (political) consideration for environmental issues and objectives in terms of sustainable development, and so on, a number of initiatives have been undertaken, attempting to reconcile these constraints and objectives. The practices aim in particular to find satisfactory solutions in terms of eco-responsibility, that is, by making every effort to respect nature and the environment.

One example of this type of initiative<sup>58</sup> is that of the Payment for Ecosystem Services (PES), which was set up as part of the Pumlumon Living Landscape project backed by the Montgomeryshire Wildlife Trust. The system is based on a mechanism of exchange between suppliers (property owners and farmers), purchasers (private Foundations, the towns concerned, the national government and some of its agencies), for particular services (planting of trees to serve carbon absorption goals, rainwater storage to limit flood risks, improved management of activities for maintaining biodiversity, the improvement of landscape attractiveness). In France, similar practices exist, such as the agri-environmental and climate measures (mesures agroenvironnementales et climatiques, MAEC) of the Common Agricultural Policy; in the Somme for example, in exchange for remuneration, farmers protect and enhance the environment. The mechanism developed by Vittel is regularly cited as an emblematic (local) case: the company

<sup>58</sup> Identified during the benchmark work carried out on the basis of European cases.

finances farmers who then change their practices and their technology, to decrease the impact of intensive agriculture on the quality of the mineral water.

The Payments for Environmental Services (PES) are related to the introduction of market mechanisms in the area of environmental protection or preservation, when the environment has long remained far removed from such mechanisms. They could involve a view of biodiversity that is too utilitarian or anthropocentric (Maris, 2014). The public authorities are gradually seizing this mechanism which is both new and innovative. Nevertheless, the objective remains to consider these modes of intervention as complements and not as substitutes for usual modes of action such as regulatory obligations (which are however rigid) and the financial payments (necessarily limited) at work in the area and the compensation mechanisms already in force.

In actual fact, the payment practices tend to spread, at the local level, in extremely diversified forms, to the extent that no model has emerged in a standardised manner. In parallel, their operational implementation is not straightforward: the governance arrangements and the practical measures for establishing contracts between the parties raise problems. The success of PESs is therefore currently mixed. Among other things, the ecotourism industry is unwilling to pay for the provision of such services and there are no improved payment mechanisms (Mayrand, Paquin, 2004).

According to experts in the field, one of the ways of giving more potential to PESs would consist in recognising the “natural heritage” status of the properties concerned, as for the “cultural heritage”. The owner of a property recognised as being part of the natural heritage (classified, inscribed, etc.) would then be subject to a number of obligations (relating to preservation, maintenance, etc.) and in return, be qualified for benefits (fiscal benefits, etc.). One barrier persists: how do we (sustainably) categorise what makes “natural heritage” (Etrillard, 2016)?

Tensions still arise, frequently or repeatedly, between management imperatives and the socio-cultural practices or representations attached to the places. The payments required from the persons using the sites, be they inhabitants or visitors, are one of the subjects around which these tensions often crystallise.

As shown by the survey conducted in all the sites, not all managers practise pricing, if only because they are often open places. However, and this is confirmed by the field studies, the tariff resources, when they can be established, receive genuine interest from the managing entities.

This interest is firstly financial: ticketing provides the collector entity with their own resources. It is alleged that this guarantees it a certain autonomy with regard to the local authorities usually contributing to its budget<sup>59</sup>. Secondly, tariff advantages (such as multi-access tickets or subscriptions) are a means of building audience loyalty and, especially, of establishing partnerships with other sites, with a label (between the Aven d'Orgnac and the Pont d'Arc Cavern, for example) or not, but scattered across the territory, and contributing to the overall attractiveness, or to the decongestion of the most visited locations (initiative of the Pays d'Art et d'Histoire du Vivarais méridional/Country of Art and History of Southern Vivarais for example). Thirdly, the fees paid by visitors are compensation for the expenses due to their presence and for the provision of the services they receive. Unlike free admission, the payment of entry fees is considered as fostering a sense of responsibility.

In a system which escapes the market, owing to the nature of the properties proposed, the setting of a “fair” tariff always appears complex. The managers met claimed to pay great attention to the prices they practise. The tariff scales are mainly set by

<sup>59</sup> The amounts of these contributions cannot however be easily modified since they fall under statutory provisions.

comparison with what applies elsewhere. “The price must not be higher than...”. Interactions between local authorities can then take precedence over budgetary considerations. The unit tariff determination stage gives rise to multiple political trade-offs, in particular when, in addition to performance targets, these prices have a strategic vocation. It was said that one must wait for the right time to address the question with the communal, intercommunal and departmental representatives, by taking account of the election timetable, etc. This caution is for example warranted for payments that have an incentive (for the use of car parks) or dissuasive (for car use) vocation. The question arises at the Combe Pont d’Arc, for the site of Puy Mary, in the Somme Bay, etc. One of the challenges consists in determining the proper time step (for parking) compatible with a visit which keeps its meaning and is not reduced to a simple halt, in opposition to any appropriation.

One of the cases in which the tensions between the tariff system, financial and sociocultural issues manifested themselves acutely is illustrated by the Pont du Gard (Roman Aqueduct) site. These tensions were sufficiently severe to give rise to a media handling and to the emergence of a citizen mobilisation. They mainly concerned the appropriateness of introducing the tariff system (breaking with the free admission that has always prevailed), the price level (which must provide resources without becoming dissuasive), the publics contributing to the payment and, especially, the legitimacy of their possible differentiations (between pedestrians and cyclists, between visitors and residents, and so on).

This shows that in practice, a financing vector, apparently simple and still limited in scope in terms of performance, becomes the basis for a range of tensions. The operational implementation of provisions to reduce them is not locally straightforward, in particular owing to the strong dependence on previous practices.

## Approaches to address resource constraints

With the primary purpose of easing the tensions weighing on their budget, all the site managers (and perhaps even more so for the sites recognised under the RGSF), in the context of the survey conducted at national level, reported a willingness to innovate in their financing arrangements. A few of the steps taken to find new paths to balance, were mentioned. They are mainly related to the search for commercial revenues, the establishment of partnerships through foundations or, more broadly, the recourse to forms of sponsorship. The aim is, by those more or less conventional means, to capture additional resources from those who pass by, visit or find an interest in the site's existence.

In most of the study areas, in the dedicated shops and offices of the localities visited, items (“souvenirs”) of all sorts are offered to visitors. With the risk that the presence of identical and standardised products and shops... will lead to a staging and a trivialisation of the locations, incompatible with the search for authenticity, yet at the foundation of the values of the properties and sites (Fainstein et al., 2004). Alongside this commodification and precisely for the purpose of making the difference, local products, based on territorial particularities, on specific know-how, and so on, often associated with a local brand or label, are offered for sale.

Besides the questions raised by the regulation to be established to guarantee the quality of such products, their commercialisation is not always a success. At the Pont d'Arc Cavern for example, the managers express some scepticism about the local product showcases. The demand is not there to meet this “local” offer. Finally, the visit is not associated with these purchases. The shelf displays are reduced, given the modesty of the revenues and the weight of the management costs. In the Somme Bay, the sale of seafood or specific products and their use in restaurants are beneficial, in that they gen-





Salt works of the Valle Salado de Añana, © Manon Loisel





erate multiple chain effects. However, even if the potential is there, its enhancement is limited: culturally, the products from the maritime Bay are “neither given nor offer added value” according to the local stakeholders; furthermore, their selling price is not appropriate for everyday consumption. One could, in the same way, mention the case of the beef meat of the Marais Poitevin.

Yet similar initiatives are conducted elsewhere with success, in particular for the site established around the saltworks of the Valle Salado de Añana. The sales revenues contributed to the rehabilitation of the site, to the revitalisation of territorial development. Under what fiscal and financial conditions could a similar mobilisation be implemented for the French sites? The question remains, with regard to the mixed success of the provisions already initiated.

One of the ways of associating private partners (most often companies) with non-lucrative actions, with a public utility or serving the general interest, lies in resorting to foundations or to sponsorship. National mechanisms regulate these associations, avoiding a ‘cannibalism’ of sponsors, offering them fiscal advantages in return for their participation and guaranteeing them a certain visibility.

Even if the survey carried out at national level indicates that it is not a major source of financing, the existence of recourse to sponsorship and/or foundations was mentioned for several study areas.

For example, the foundation Chaîne des Puys – Faille de Limagne (Limagne Fault) has existed since 2012. It presents itself as “the first and only foundation dedicated to a site nominated for world heritage status”. The massif and its surroundings suffer from an abandonment of agricultural land, which leads to the overgrowth of mountain landscapes, those which create the brand image destination. The aim is to maintain the outstanding natural environment. The member companies of the foundation, which maintain a more or less close relationship with the territory, find an interest in it, whether it is their own brand image, the attractiveness of the locations for their employees, or the development of their activities owing to a strengthening of territorial dynamics.

While not using quite the same means, private funds have also been raised to support the inscription at least for the Mining Basin and for the cave known as Grotte Chauvet; these two initiatives are continuing. A call for sponsorship has also been launched for companies to preserve and restore monuments of the heritage of Le Havre.

The development of the sponsorship procedure, in order to be efficient, generally requires the mobilisation of specific engineering, communication approaches and ad hoc expertise, that managing entities or small local authorities do not always have. This can, among other things, be an obstacle to the growth of practices, as they still arouse resistance.

The approach to be deployed is indeed heavy. What is more, it is not productive in the short term. Its success, and the volume of the funds collected, seem to increase if they are based on “anchoring” to a known vector in the field, such as the Fondation de France (Foundation of France). Whereas this vector must have significant reach, it can only be external to the territory concerned. The EPCC of the Abbey church of Saint-Savin-sur-Gartempe is experimenting in this respect with a partnership with Universcience, for example. The aim is indeed to gain in financial autonomy and to be able over the long term to obtain about 25% of the funds required for each action from sponsors. The cooperation appears to be “winning” in terms of fundraising for the managing establishment, which is faced with budget limitations and with the low availability of the resources of its member local authorities. Nevertheless, it imposes a change on the site’s vocation and image and in its visitation rates. In parallel, to justify the partnership, the aim is to reach 45,000 to 100,000 visitors; a national, but especially international and high-end clientele is sought.

Would sponsorship find ways to develop mainly with the support of such structures and vectors, with the risk of being doomed to a low level of fundraising? Is it potentially an open path towards a form of financialisation of the preservation and future of the sites, with the public initiatives depending, in the rounds to gather the necessary funds, on the motivations of private actors, and on their temporalities?

The implementation of such mechanisms raises questions regarding their financial scope and, more generally, regarding their place alongside public funds. A club of sponsor companies (Club des Entreprises Mécènes) intervened to financially support the costly restorations of the plantations along the Canal du Midi<sup>60</sup>. Companies and private individuals are invited, under the leadership of Voies Navigables de France VNF (the managing entity of the property) to record their contribution in the history. Between 2006 and 2015, nearly €30 million was spent on restoration actions; companies contributed to about 5%, and private individuals to 1%. The share of local authorities reached 5%; that of VNF (89%) remained largely predominant. In parallel, it is claimed that “350 companies and 2000 jobs directly depend on site-related activities, whose annual economic benefits are estimated at 122 million euros.” The link between the importance of activities and their participation cannot be direct. Nonetheless, the significant gap between the estimated benefits and the amount of the funds obtained from economic actors gives us reason to wonder, especially since the actions to be taken are considered as structuring to preserve the identity of the Canal.

In various European countries, forms of associations of private individuals and/or economic actors to finance projects concerning the sites are developing. As part of the Flag Fen initiative (in Great Britain), heritage crowdfunding by Dig Ventures was used to implement archaeological excavations. The projects can even be rather ambitious (Mendourmountains project, in Great Britain) when it comes to the restoration and enhancement of several national parks. They can on the contrary be more targeted when the aim is for example to associate property owners and private actors financially to the restoration of buildings with a heritage interest (Deutsche Wohnen initiative in Berlin, for example) or to innovative approaches (the Valldaura Self Sufficient Lab in Barcelona, for example). The call for funding is then part of an overall approach, eliciting shared interests.

<sup>60</sup> According to the Club, “This ambitious restoration project requires a budget of 200 million euros exclusive of the project ownership fees.”, including 54 million euros for the plantings alone, for a period of 20 years.

One of the ways of increasing the contribution, in particular the financial contribution, of the actors – whether economic or not – in the local public action would be, under any assumption, for this association to intervene as early as possible in the projects, with a view to real co-construction. The very paradigms of public action in its political and operational aspects, would be required to change notoriously, in light of current practices and of the very conditions of governance of the sites and territories. Otherwise the raising of private funds is the result of an instrumentation, if it takes place only at the stage of the financial arrangement. Assuming that these prerequisites are met, it remains true that public contributions must be obtained, financing through taxation remaining necessary since “the fact that the tourism sector benefits from the maintenance and enhancement of the cultural heritage, but contributes little to it, constitutes a positive externality justifying public intervention.” (Benhamou, Themsar, 2011). In addition to the innovative forms of voluntary association of private actors in the financing of public action, would it not be appropriate to attempt to remedy the ills afflicting their traditional and restrictive contribution modalities in the form of tax measures?

This analysis finally shows that the mobilisation of the required funds, for local authorities as for managing entities, raises multiples issues of various orders, like those raised by the sites themselves.

Some of these issues are related to the outstandingness of the locations, which increases the difficulty of reconciling short-term investment and operation over time. Some issues also fall within those regularly observed for so-called ordinary territories, in connection with the limitations of the French local tax system, against the background



of disconnections separating this system from the local policies or territorial realities. Overcoming such obstacles depends on comprehensive reforms and their timetable. In their absence, the resources from the site cannot really serve the territory, and vice versa. Faced with this situation, the temptation could be strong to address the shortcomings of existing fiscal instruments by having recourse to new taxation systems, with a certain exceptionality. Besides the fact that the capacities of the latter are often limited, and that they contribute to further complicating an already very complex fiscal structure, their possible introduction could under no circumstances escape the questions relating to the sustainable mobilisation of traditional budget sources and taxes.

Such funds are essential for the financing of outstanding heritage sites, as they incorporate a large share of public goods, requiring public contributions based on ordinary taxation. These modalities, however, are not exclusive. In particular, for the purpose of removing all or part of the tensions at work in the face of financial needs and to find paths towards balance, initiatives are being deployed to collect private funds from economic actors, inhabitants and passers-by. Beyond objectives in terms of return, one of the major advantages of these formulas lies in the association or partnership they enable with those who pay them, on the basis of a conciliation of interests. These relationships are built based on the resource which is the site and/or the territory, on the spirit of the place to be enhanced, preserved, and so on. They still have a form of transversality: the landscape is in question in some places, elsewhere it is the development of the local economy or the mobilisation of the populations in place. While not considering only their financial component, how can one proceed so as to ensure that these partnerships are maintained over time and in the continuity of actions, from their creation to their implementation?

From the point of view of financial governance, the multi-territoriality of outstanding heritage sites and institutional fragmentation exacerbate common tensions. In particular, the management structures are faced with a dissociation between the regime of their costs and that of their means. As a consequence, should one multiply or perpetuate such entities and such gaps? The formula of the joint associations may



appear fragile at the institutional level, at the time of the reduction in the number of grouping structures, initiated in particular by the MAPTAM and NOTRe laws. With those legislative developments (and the previous ones), the scopes and competences of intercommunalities with their own tax system have just been extended. These forms of groupings have their limitations; they should not be considered as the relevant form in all circumstances. Nonetheless, when the formula can be envisaged, why not entrust the management of outstanding heritage sites to the intercommunalities concerned (or in the case of sites in series, to a federation of intercommunalities)? Besides a fiscal and financial unity, it would have the advantage of bringing together within a single body the competences involved (planning, territorial development, tourism, etc.) and the organisation of the necessary means, the related debates, by making them compatible with the territory project.

The political or governance conditions and the conditions of means thus laid down can lead to tensions in terms of activation of the territorial resource just as much as they are conducive to their easing. How do the actors perceive the issues on the economic, environmental and socio-cultural levels?





## CHAPTER 2

# **ACTIVATION AND APPROPRIATION OF AN ECONOMIC, LANDSCAPE AND CULTURAL RESOURCE**

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The heritage, around which the study sites are organised, is often multiple (cultural, natural) or composite and made up of objects accumulated or designated during various trajectories. In most cases, natural and anthropogenic dimensions coexist: the sites, their territories and their landscapes bear traces of activities, most of which pursued economic goals. This vocation, more or less perceptible today, reveals the existence of the territory's productive capacities: these can be re-activated, either as such, or by integrating the societal changes affecting both the individual and collective needs and the means or technology to meet them.

Landscapes, because of their perceptible dimension, carry strong identity dimensions, a real federating potential for the emergence of arrangements, projects or strategies, likely to help overcome the tensions running through the territories, be they outstanding or not. How and under what conditions can this political mediance capacity be mobilised?

Outstanding heritage sites and their territories, if they are productive, are also inhabited and visited places. This implies uses and (economic, cultural) spheres which interfere in favour of or against all or part of the protagonists. What are the conflicts and dynamics at work, among which a number of paths to balance emerge?

## (Re)activating heritage sites as an economic resource

Heritage today bears witness to multiple past economic dynamics: a landscape and lands shaped by peasant activity and then by agricultural activity; a productive artisanal or more industrial past; a commercial, urban and trading activity; a therapeutic role, and so on. Whereas some economic activities remain, they have most often disappeared and with them, the uses enabling the site's maintenance.

The enhancement of the heritage for tourism purposes remains an important economic opportunity for the territory (Zeppel et Hall, 1991; Prentice, 1993; Cuvelier et al., 1994; Benhamou et al., 2011) due to the economic bases it provides (Talandier, 2013) and its repercussions for consumption (Ruault, 2017). But it can also be useful to conceive the site as a contributor to the local economy – in the diversity of its resources and uses – and not exclusively as a lever of enhancement for tourism purposes. Furthermore, we know today that the most dynamic territories, less socially inegalitarian, or the most successful ones in weathering the crisis of 2008, are the territories which have a diversified economy and which combine in particular productive, residential, public, and tourist development drivers (Talandier, 2016). The use of heritage objects for tourism, when it involves a too great specialisation of the territory, therefore cannot provide a sustainable future.

This part aims at understanding the mechanisms through which the territory is able to (re)activate heritage as an economic resource for sustainable development purposes, particularly in terms of the diversity of activities generated within the territory. To do this, it should be remembered that heritage is neither a completely immutable and ossified good nor a simple market good exploited solely for economic purposes, as recalled by the notion of collective good associated with it. Its intergenerational transmission value and the issue of its preservation make it a complex economic good whose economic valuation can generate tensions between stakeholders, as previously seen (Varine, 2002).

Two structuring and seemingly conflict-generating elements in terms of economic development emerge from the study areas. First, the feeling (more or less justified) of a low sharing of the heritage income sometimes creates discontent or a loss of interest in the site. Furthermore, the accumulation of regulation mechanisms appears, for some, to be detrimental to the economic development of the territories. Despite these tensions, or perhaps owing to these tensions, the sites are not without innovative initiatives and experiments which give us a glimpse of the possible levers for diversifying the uses and economic functions of the sites and territories. Neither immutable nor perishable, heritage should be considered and enhanced by territorial actors as an evolving asset (Choay, 1992; Soucy, 1996; Sgard, 2010) which is part of a collective process which differs both in time and space.

### **Sharing economic benefits**

Whereas outstanding sites are part of collective heritage issues, justifying the meeting of shared costs by the local authority, economic benefits in the territories can sometimes be very localised and only be observed in a few communes, in a few very targeted locations. Thus, the distribution and spatial sharing of the sites' tourism benefits are often perceived – or described - as being relatively limited, which can justify the low mobilisation of some actors and territories which ultimately feel fairly unconcerned by the heritage site. The problem is therefore not so much – or not only – due to the lack of local economic benefits, but rather to the low distribution, or to the monopolisation, whether intended or not, of the income by a few localised economic actors.

In the case of the Ochre Massif, one actor testified to the benefits observed mainly for the commune of Roussillon, with no impact for example for the commune of Apt which has many disadvantages and the less well-off populations of the territory.

In the case of the Mining Basin, there is a concentration of visits and tourism benefits in only a few locations. Thus, 60% of the visits are to leisure centres and aquatic centres and among the 9 listed facilities, the aquatic centre of Béthune (450,000 entries) and the departmental park of Olhain (300,000 entries) seem to be preferred by the users. In the Somme Bay, territorial divides tend to increase in terms of attractiveness and development between the south and the north, the coast and the rural hinterland. The Canal du Midi is also an interesting case, with a tourist exploitation of the site which is not very diversified (river tourism) and has low impacts for the communes crossed, with a few exceptions. Thus, the rare boat rental companies which share the market seem to be the main ones to reap the benefits of the situation. To this sector, we may add a few local benefits in terms of jobs in restaurants, gites and guest rooms located in a few beautiful villages crossed by the Canal.

The impact in terms of employment is assessed as moderate overall by the site managers themselves. 23% of the managers of RGSF sites and 13% for UNESCO sites consider that the site's effect on employment would be significant. 40% of the managers of UNESCO sites consider that there would be no impact. This coincides furthermore with a feeling that employment is stable or slightly increasing. The vast majority of contracts would be seasonal, but full-time and mostly occupied by local inhabitants (at 80% on average according to the declarations). Whereas for all the sites studied, there is a diverse range of business sectors which take advantage of the local heritage, taken one by one, the sites are rather marked by the primacy of a few key sectors. Tourist activities tend in particular to emerge locally as the main beneficiaries, according to the interlocutors met.

In return, one of the strategies commonly put in place locally or desired – in particular by economic actors – in order to improve local economic benefits is related to the rise in on-site sales of regional products. The survey reveals in this respect that one out of two sites has a renowned product or know-how in connection with the site (Table 17).



Table 17: Regional products and know-how enhanced within outstanding heritage sites

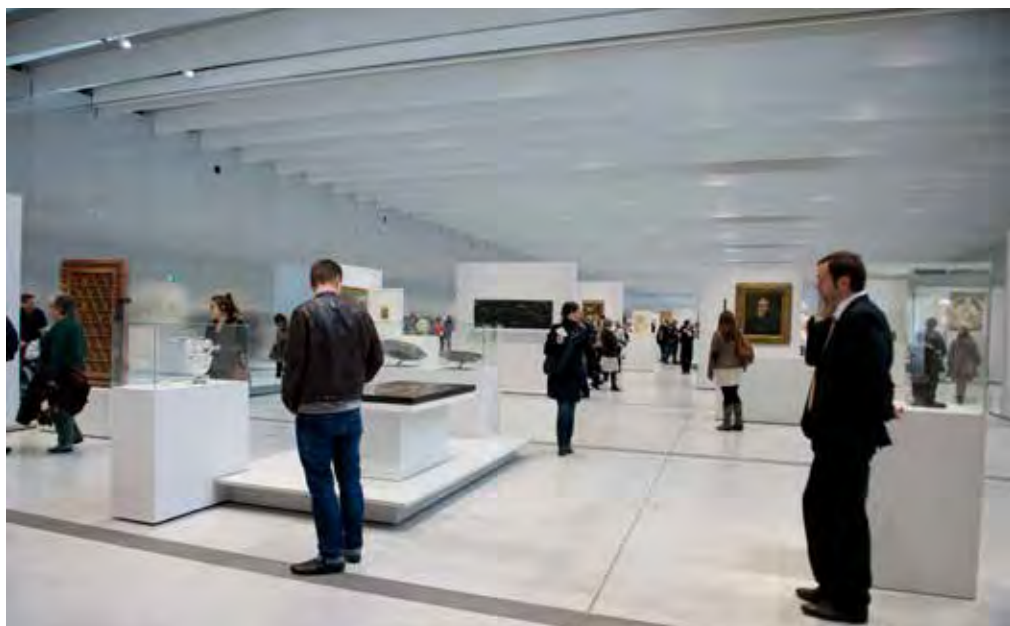
Source: Survey among site managers - 2016, drawn up by the authors

Name of the site	Declared products and know-how
City of Carcassonne	Wine and cassoulet
Grand Site Cape of Erquy Cape Fréhel	Scallops
Sainte-Victoire	Wine
The Causses and the Cévennes, Mediterranean agro-pastoral cultural landscape	Lamb, beef and cheeses (Roquefort, Pélardon, Bleu des Causses)
Ancient Jurisdiction of Saint-Émilion	Château Saint-Émilion
Basilica and hill of Vézelay (Grand site of the Vézélien)	Wine and fine dining restaurants
Circus of Navacelles	Products of agro-pastoralism: Roquefort...
Grand Site Salagou - Moureze circus	Wine (AOC Languedoc), cheeses (Pélardon, Roquefort) and chickpeas
Vézère Valley	Nuts and poultry products: foie gras, confit, magret...
Camargue of Gard	Course camarguaise (Bull race of Camargue)
Grand Site Saint-Guilhem-le-Désert Gorges of Hérault	Wine and ceramics
Rocamadour	Rocamadour and farm lamb of Quercy
Grand Site Gâvres-Quiberon	Fishery products
Grand Site Marais Poitevin	Products "Les saveurs du marais", moquette, and fine dining restaurants
Ochre Massif	Ochre, colours, wine, olive oil and seasonal fruit, candied fruit
Grand Site of Gorges of the Tarn, the Jonte and the Causses	Wine
Giens peninsula	Bouillabaisse
Grand Site de France Solutré-Pouilly Vergisson	Wine
Puy Mary Cantal Volcano	Products of the Cantal PDO
Grand Site Somme Bay	Lamb from salt meadows, wild plants and bouchot mussels
Episcopal City of Albi	Know-how around the brick
Historical site of Lyon	Guignol show (puppet show from Lyon) and fine dining restaurants
Provins, medieval fair town	The Rose of Provins









Louvre-Lens Museum, © MTES/MCT, Terra

The outstanding heritage site is indeed perceived as a showcase to make local products visible. The creation of a brand is then the most accomplished form of this type of approach, for example “Les Saveurs du Marais”, “Émerveillés par l’Ardèche”, “ALL” for the Louvre Lens or “LH” for Le Havre. So-called “regional”, “authentic” or “emblematic” commodities then bear the stamp. “Les Saveurs du Marais” (Poitevin) cover typical products (mogette beans, angelica, etc.) but also others emanating from a folkloric imagination (coypu pâté, crayfish soup, etc.) or coming from neighbouring regions (salted butter caramel, etc.). The abbreviation “LH” (for “Le Havre”) is even attached to pure merchandising products such as clothing or stickers. Local actors are conscious of the haziness and free appropriation surrounding the brands created in this way, which in return fosters the willingness to regulate them and to back them by manufacturing or provenance ethics. The managers of the Puy Mary - Cantal Volcano, for example, have initiated such an approach, with the willingness to draw on the Grand Site de France logo which is dedicated to them as a source of inspiration, and to subject the use of this trademark to compliance with a charter. In Europe, the actors of the Añana valley were able to provide an international guarantee of quality to regional products through obtaining an official recognition of its products by the NGO Slow Food and relied in addition on a commercial promotion by chefs as “ambassadors” of their region.



More broadly, the products that contribute to the site's heritage identity benefit in return from a boom in market value for visitors, just like the marine plants in the Somme Bay or the ochres in the Massif of the same name. Even ex nihilo creations can then benefit from it as in the case of salt marsh lamb meat or Highland Cattle meat in the Somme Bay. Finally, the territorial income extends to more conventional market products, such as land areas and real property, whose prices can surge due to the landscape outstandingness of the site for the best locations. No less than 73% of the sites surveyed claim to benefit from an increase in property values attributable to the site's existence, including 30% of sites declaring a situation of a strong increase in prices: Saint-Émilion, Giens peninsula, Dune of Pilat...

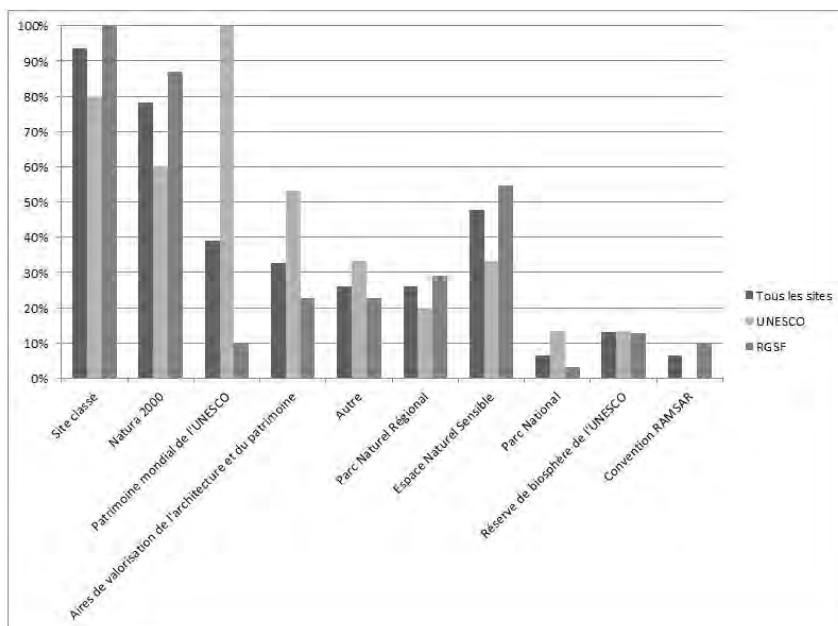
Whereas these elements play a part in the economy of the territory in which the site is located, they are not sufficient to create a real development lever. To do this, the territories need ambitious projects which sometimes come up against the protection measures for outstanding heritage sites.



Le Havre © UNESCO (by Francesco Bandarin)

Figure 13: Regulatory systems observed in French outstanding heritage sites

Source: Survey among site managers - 2016, drawn up by the authors



## A development hampered by preservation measures

The heritage process contributes to landscape and preservation issues increasingly being taken into account. As a consequence, one of the characteristics of outstanding heritage sites is related to the high number of regulatory systems to which they are subjected, as highlighted by the results of the survey conducted among site managers (Figure 13).

Each site would be on average concerned by four different heritage or environmental management or protection systems. Whereas these systems are not specific to outstanding sites, their number and their intertwining seem to be particularly significant in these fragile areas. For example, beyond the management scope of outstanding sites, preservation or protection initiatives seem to have a more moderate scope since 65% of the managers surveyed declared that only a few initiatives are observed outside the site.

Whereas the outstandingness of the sites seems to justify these frameworks and constraints, the stakeholders also see in this a risk for the economic development of the territory. Even if local elected officials and actors are drivers in the collective mobilisation with the aim of obtaining these labels and inscriptions, they also express a certain annoyance with the “accumulation of procedures”. Of course, there is a risk of exploitation of this apparent accumulation of mechanisms by territorial actors, who find there a reason to manifest other forms of category-related or institutional discontent. Without these mechanisms, though they are many and complex, there would probably be no or no more heritage.

Nevertheless, these regulations give rise to tensions and are most often considered, rightly or wrongly, as barriers to residential and/or productive economic development. In the Mining Basin, one of the respondents noted for example that the nomination, which attracts wide consensus among elected officials, can sometimes be perceived as a constraint rather than an opportunity for the territory. Following the classification of 80 slag heaps under the law of 1930 and the inscription of new protection rules in town planning documents, there is a great fear of an “immobilisation of the territory”; and it is felt all the more given that the region is still searching for a new momentum since the decline of its industry.

More broadly, the regulatory context becomes structuring in local development dynamics, by extending the investigation periods for both major and minor developments (Canal du Midi, Pont d’Arc, etc.). It creates incomprehension among some actors, as well as some businesses which border the Canal du Midi without being able to make themselves visible through signposts, or private property owners who see it as an infringement on their freedom to lay out their land or to renovate their property (Ochre Massif, Nord-Pas-de-Calais Mining Basin...). The regulations do not always provide either for responses adapted to popular uses within these sites, such as recreational uses in the case of the slag heaps of the Mining Basin, or the creation of water storage basins to facilitate agricultural irrigation near the Canal du Midi. The protection measures, being calibrated on ancient or current uses, are thus likely to introduce additional barriers





to change in the territory, the management methods then being at odds with social expectations.

Thus, despite the diversity of socio-economic contexts, there is a certain convergence of concerns around regulatory mechanisms and their constraints for addressing local development issues. In the Somme, this accumulation of mechanisms is considered disadvantageous for inhabitants (facing limits in the fitting-out of their residences), for stock breeders (who cannot build in flood-prone areas) and for promoters (more cautious in their investments) or for landowners (owing to constructibility limits). The accumulation of rules is perceived as being potentially harmful to synergies between the outstanding heritage site and the surrounding territorial dynamics, since the one cannot easily or efficiently constitute itself as a resource of the other. As suggested by a mission head from UNESCO, the management plan of the sites should perhaps openly include territorial economic development objectives so that site-territory synergy becomes an objective to be achieved.

Yet there are many economic development opportunities in these territories. Whereas 76% of site managers observe an absence or a weak interest of large national retailers in the enhancement of the heritage site, this hides the fact that beyond the hotel and restaurant sector and sports and leisure activities, a wide variety of business areas take advantage of the existence of an outstanding heritage site (building, food trade, public services, and so on). In the Sensitive Natural Area (Espace Naturel Sensible, ENS) of the Nord-Pas-de-Calais Mining Basin, the extension of a logistics platform will be difficult to envisage. Conversely, the maintenance of the landscape cones and open areas offers new perspectives for farmers, or for operators of tourist, cultural or recreational activities. There are also many sites where the intensive exploitation of agricultural land is made difficult, in mountain or marshy areas for example, to the benefit of more extensive practices adapted to these environments. Agriculture can then be a driving force in the maintenance of wooded belts or in the perpetuation of rare know-how relying on the identity and quality of the products (mogette of the Marais Poitevin,



Ochre Museum © Tourism office of the Pays d'Apt and Lubéron

Bleu des Causses... ). The Grand Site of the Somme Bay is another specific case, since this territory, subjected to significant regulatory constraints owing to its listing and to the risk of coastal flooding, was able to capitalise on the heritage process to undertake a transition of its economy, from a food-producing bay to an event-oriented bay: environmental education, export and in situ tasting of products from the bay, experience in soft mobility, wildlife observation, outdoor sports, nature photography, Bird and Nature Festival... We note the growth of associations that hire, undertake initiatives, support new uses and invent new economic models: Zéro Carbone for an eco-mobile tourism; Rando Nature, on the initiative of hunters, to raise awareness about the coastal fauna and the functioning of the bay; the Tourist railway association... The initiatives led by the SCIC Okhra in the Ochre Massif, in order to enhance “colour” as a territorial resource, are also an interesting example of social innovation with impacts that are not only economic, but also social, cultural and environmental.

Whereas it is true that the growth of economic activities cannot follow the same conventions outside of the protection scopes, outstanding heritage sites also reveal themselves as areas for the growth of quality and environment-friendly activities, and as possible places of innovation or protection of activities that are threatened elsewhere.

## Innovations within and with territories

Undeniably, outstanding heritage sites accumulate a stimulating experimentation potential. In the Marais Poitevin, one of the respondents spoke of the Grand Site de France as “the laboratory, the experimental field”. The moderate-intensity nature tourism which is deployed there, is considered to be of quality. This idea of laboratory is found in the “Ardechemix” project, a living museum open to innovations and taking place around the site of the Gorges of Ardèche. The aim is to mobilise a community of local creative people to think out and put in place a remix of the heritage of Ardèche. Also common to all the study sites is the fact that they develop jobs and skills in management and leadership, which leads for some to training activities, such as nature guide training (Somme Bay, Marais Poitevin, Grotte Chauvet...).

By obliging actors to adapt, to move away from usual standards, by inventing new mechanisms and by supporting the emergence of economic sectors with higher added value (Cortright, 2002; Mollard et al., 2006; Campagne and Pecqueur, 2014), such as organic farming or eco-tourism, the territories in which these outstanding heritage sites are situated have the potential to support innovative activities. Whereas the signs in that respect remain weak and are only emerging at the level of the French study cases, the studies of European outstanding sites support this hypothesis.

In Europe, various natural and cultural sites have initiated methods to propose renewed forms of heritage enhancement through new functions: gardening, residing, doing sports, studying, and so on.

In the Italian Piedmont for example, the meetings carried out also revealed the existence of an agri-industrial model diversification policy, with in particular the emergence of agri-tourism initiatives based on visitors’ interest in the cultural heritage of Piedmont and their search for an experience in it, whether it is through overnight stays, restaurants or other in situ activities.



In the industrial valley of the Ruhr river, dotted with UNESCO sites, along the Emscher river, the project of the productive landscapes began in 2010. The aim of this project was to define the productive identity of Emscher Park and in doing so, to enable the natural heritage to become open to new uses. In partnership with farmers and owners of the plots, vegetable gardens were made available for leasing to practice urban agriculture. Two types of spaces were proposed to reactivate the tradition of workers' gardens: allotment gardens, scattered throughout the park, belonging to different types of owners (private individuals, industrial companies, public associations or communities); community gardens (Gemeinschaftsgärten), a property of the Regionalverband Ruhr, are also used for setting up intercultural, international projects, networking of actors, etc. But the site is also known for the richness of the uses and practices offered to visitors. Thus, the gasometer was filled with water and is now a spot much appreciated by kayakers. Likewise, the walls of the boiler room were transformed into climbing walls. These facilities were made available to local associations or communities. To that one must add the reconversion of some indoor areas into reception rooms, performance halls or conference rooms which can be privatised. A corollary to this new management modality was the diversification of the modes of financing of the sites' maintenance. Thus, the site managers also became real rental agencies. Hence, they had to be trained and find tools (regulations, charters, legal protection and insurance...) to accompany this change.

Other experiments make it possible to reside or work in a historic monument. This is the case of Bury St Edmunds, in Great Britain. This historic monument is an ancient Benedictine monastery, which throughout its history has suffered damage related to riots, collapses, and fires which have in particular weakened some extensions. Over time, the houses which had been inserted in the main structure in the 18th century have been abandoned for a long time. In view of this, St Edmundsbury Borough Council, the owner of the site, and Historic England, a public establishment under the Ministry of Culture, which is responsible in particular for the protection of buildings, joined forces to renovate this site. Applying the method of Constructive conservation, Historic England selected a team associating the municipality, the developer Hawes and Southgate

and the Nicholas Jacob Architects agency. Together, they achieved the renovation of the site, make it habitable once again. Today, five new dwellings are occupied. The occupants of the places must sign a charter in order to respect the historic monument, and adapt their lifestyles to keep the monument open to visitors. In France, among the 43,000 historic monuments, almost half belong to private owners, and many are housing residences. However, if this ambition is projected onto outstanding heritage sites, the perspective is more audacious. Many outstanding heritage sites are obviously inhabited, whether it is among the Grands Sites de France (Sainte-Victoire Mountain, the Cévennes, etc.) or among the UNESCO sites (Stanislas Square, fortified city of Carcassonne, Strasbourg Grande Ile, Provins, Le Havre, etc.).

Finally, to diversify uses, natural and cultural sites are also occasionally transformed into experimentation and innovation areas. This is the case of the Lingua Natura project (Switzerland) which makes an outstanding site available to offer a language stay. Since 2010, Lingua Natura has been offering, in the natural parks, language stays (in Italian, German, French or Romansch) of 5 days intended for specific audiences (working persons, aged 40 and over, with a beginner or intermediate knowledge level). Besides the courses in classrooms, excursions are offered to participants to discover the specific characteristics (geological, floristic, faunistic, archeological, historic and cultural) of the region. One of the particularities of Lingua Natura is to foster exchanges between the participants, mostly urban dwellers, and the local population of rural regions. The learning of a language is perceived as a new point of access to nature and culture. The Swiss Parks Network solicits coaches for this purpose to put in place these language stays in partnership with the park directorates, the tourism organisations and the service providers.

Beyond this cultural experiment, many sites mobilise digital tools (augmented reality devices, immersive technology, mobile technology, RFID systems, motion capture techniques, etc.) to enable visitors to benefit from a richer, more enjoyable and interactive experience, in tune with their needs and expectations.



This is the case of the Muséomix event (extensions of which already exist in Ardèche – see above). Since 2011, the team of Erasme, with the Nod-A agency and the teams of Buzzeum and Knowtix, has been co-organising the Museomix event, which transforms the museum into an experimentation area for three days. The first edition took place at the Museum of Decorative Arts in Paris. Each experiment sets the goal of reinventing a selection of works of art from museums, thanks to digital technology. Even if the organisation of Muséomix does not include, at present, the systematic postproduction of the prototypes made during the event, their perpetuation is encouraged and supported as much as possible. The teams themselves often work with the museum, or independently, to make their prototypes evolve towards a stabilised solution.

In the same vein, the BNF Lab in Paris proposes to test new digital devices in a library. From 2010 to 2015, it relied on the collections of the National Library of France (Bibliothèque Nationale de France, BNF) to enable the general public to test new devices for accessing, sharing and contributing to knowledge. It hosted conferences and workshops (writing and creation, digital readings, enriched book, etc.) which contributed to making this area for experimentation and dialogue a real laboratory. It was also complemented by pedagogical support. In four years, the Lab hosted more than a hundred events and welcomed many visitors.



The last example of a site transformed into an experimentation place is the *Valldaura Self Sufficient Lab* of Barcelona, which proposes the testing of prototypes of the city of tomorrow in a natural area. Valldaura is a State-owned land of 130 hectares located 15 minutes from the city centre of Barcelona, within the Collserola Metropolitan Park, the green centre of the metropolis (a preserved natural heritage, with an outstanding fauna, flora and architectural heritage). Valldaura was acquired by the IAAC (Institute for Advanced Architecture of Catalonia) in 2010, with the aim of developing different sorts of programmes focusing on the three main principles of self-sufficiency: energy production (Energy Lab), goods production (Green Fab Lab) and food production (Food Lab). Valldaura is today the incubator of new forms of production using natural and sustainable processes, and for the generation of new materials. It enables field tests and the development of solutions for the self-sufficient city.

Through these European experiments, we observe the setting up of a diversity of practices enabling the (re)activation of the heritage and/or territory. Thanks to these methods of co-production and experimentation on pilot sites (with in particular the involvement of residents and users), approaches such as Living Lab<sup>61</sup> make it possible to propose innovative scenarios for the enhancement and management of the sites. As part of this research, creative workshops led on the case of the Canal du Midi, enabled scenarios to be drawn for the deployment of a mobile Living Lab on all the 240km of the Canal. The creation of travelling Living Labs, focused on the exchange of services, resources, products, knowledge or persons, makes it possible to offer new usages to the Canal (floating medical practice, Public Service house, community platform to share barge trips on the Canal, youth hostel, knowledge centre, production greenhouses, Fab Lab, viticulture development barge, floating art-sciences residence, etc.).

<sup>61</sup> As a reminder, the term Living Lab was introduced at the end of the 1990s at the M.I.T. Media Lab, then developed in Europe with the creation in 2006 of a European Network of Living Labs (ENoLL). Living Labs are defined as “Life-size open innovation environments in which users participate in the creation of new services, products and societal infrastructure” (European Union, 2009).

Finally, it can be seen that, subject to significant regulatory mechanisms which contribute to their protection, the territories hosting outstanding heritage sites are thereby faced with an accumulation of constraints to development where “more ordinary” territories are less affected. Thus, it does not appear easy or even desirable to attract all types of economic activities in these major national heritage places. This raises the question of making this obstacle, this constraint, a lever for territorial development that can be reconciled with the fragility of the site and the injunctions to preserve it.

Yet beyond the contemplative experience, the sites are made available to inhabitants and “passers-by”. This opening makes it necessary to think of new tools to manage the coexistence of uses. Furthermore, societal changes transform tourism towards more personalised services and more specific products, consumed by an ageing society whose individuals care for their well-being. It is a shift in the tourist economy which the heritage actors must anticipate, in particular through diversification in uses of the sites, but also through the more or less occasional transformation of natural and cultural sites into experimentation and innovation areas. In most cases, the use of digital tools (augmented reality devices, immersive technology, mobile technology, RFID systems, motion capture techniques, etc.) appears as a lever to activate this diversification of uses. Finally, it is also in the building of networks of national or international sites, following the example of the UNESCO and Grands Sites de France networks, that the actors feel the most encouraged. The network can then act as an action lever to mobilise audiences, coordinate actions or facilitate the local benefits of a site. The surveyed managers agree on the positive contribution of these exchanges and this experience-sharing which make it possible to gain visibility, to benefit from collective dynamics and greater awareness about new uses or ideas to try to renew management practices.

The heritage process makes it possible to preserve and conserve a rare resource, not as it stands, but to be possibly re-activated as a genuine economic resource that is not exclusively touristic. The preservation of the site thus appears as a key stage to avoid the deterioration and destruction of a specific territorial resource. Through awareness of the cultural and environmental issues of the site, and its establishment as a common good (Lascoumes and Le Bourhis, 1998; Sgard, 2010), this process can enable the development of new, innovative activities both dependent on and respectful of the places (Soucy, 1996; Varine, 2002). Placing heritage at the heart of territorial projects forces us to think about development over the long term, to conceive its sustainability and the means of transmission to future generations. We can see an opportunity there – and not only a constraint – to devise more sustainable economic development strategies.

As another component of these sustainability strategies, how do the landscape dimensions fit into these strategies?

### **The environmental and landscape dimension as federative**

Most outstanding heritage sites in France are inhabited sites. The outstanding character of the sites therefore builds a sensitive man/nature relationship, in which the actors could be entrenched in diametrically opposed positions. On the one hand, proponents of the right to enjoy and develop the territory as any other inhabited space, and on the other hand, proponents of the desire to preserve, or “freeze”, the landscape in the name of the singular character of the site. The landscape appears at the heart of the issues of outstanding heritage sites both because it is the foundation of their tourist attractiveness, which can then generate a strong territorial resource, and because it represents the relationship that inhabitants build with their territory.

Adopting the definition of landscape given by the Council of Europe, we note that the landscape means “an area, as perceived by people, whose character is the result of the action and interaction of natural and/or human factors” (Florence Convention, 2000).

The sometimes contradictory relationships between preserving a site, welcoming the public and territorial development require the maintenance of a sustainable balance that takes into account the landscape, environmental and socio-economic dynamics. This management of sustainability leads to trade-offs between actors on the future of the site. It would therefore require the setting up of a partnership-based approach of “sustainable and concerted management to conserve the value and attraction” (Benos and Milian, 2010) of the territory.

According to these conceptions, there are a number of tensions and issues specific to outstanding heritage and their landscapes, which imply the implementation of various strategies to overcome them and to ensure the sustainable maintenance of balances. The common and specific features of the study areas from these various points of view are emphasised and analysed, based on the empirical materials gathered.

In particular, the observations reveal that the landscape is a major vector of identity in most outstanding heritage sites. They underscore complementarities such as the antagonisms between the duality of the facts (natural/anthropogenic character) or processes (conservation/evolution or preservation/visitation...). They also show that a number of conflicts over use are common to outstanding heritage sites and ordinary territories: placing the landscape at the centre of debates, mobilisations and projects, the solutions found for the former shed light on and question those which could emerge for the latter, and vice versa.

### **The identity landscape as the linchpin of attractiveness**

In general, the labelling of outstanding heritage sites leads to taking better account of their environment and/or of the restoration of their natural environments. This is the case even if there are nuances.

Indeed, the examination of the study sites shows that environmental regulations are more abundant for sites listed as RGSF than for the sites listed on UNESCO's world heritage. At the extremes, the OGS Ochre Massif contains a listed site, a sensitive natural

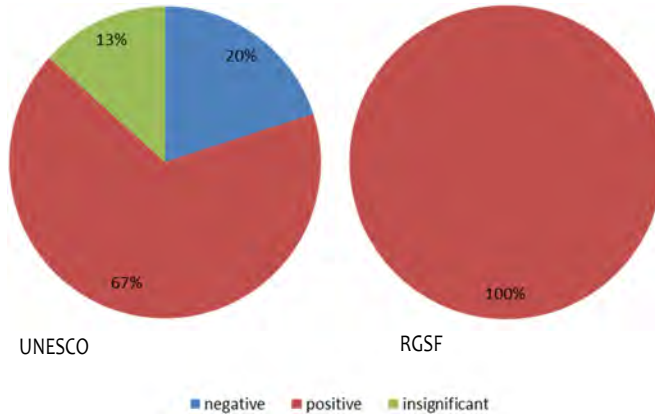
area, a natural reserve, a biosphere reserve, a Geopark, and is entirely covered by a Regional Natural Park. The Mining Basin, listed on UNESCO's World Heritage list, recognises certain slag heaps as sensitive natural areas (*espaces naturels sensibles*, ENS) and its margins are covered by a PNR. A procedure for the classification of 14 slag heaps under the Law of 1930 has been underway since 2014. This differentiation is due to the very nature of the modalities of these two recognition mechanisms: the Grand Site de France labelling is based on the classification of the sites under the Law of 1930 and thus, of their remarkable landscape, frequently based on their natural and environmental assets; the inscription on UNESCO's World Heritage list is essentially associated with cultural sites in France (38 cultural sites, 3 natural sites and 1 mixed site).

Whether the sites are listed on UNESCO's World Heritage list or recognised under the Grands Sites de France Network, the various regulatory measures associated for a same site lead, according to the stakeholders, to greater consideration of environmental issues in the development of the site and to the regulation of practices that can damage the places. Thus, whereas the comments collected concerning economic development issues denounced the tangle of mechanisms, they appear as extremely positive by enabling the impacts of practices to be managed (in the Marais Poitevin for example) or even visitation by the public to be channelled (in the Mining Basin for example).

The label as such appears as the driver of a certain culture of the site, or of changes in practices. The labelling results in a greater collective awareness about the (environmental) value of the places and thereby serves the interests of all (in the Somme Bay for example).

The national survey carried out among all the site managers supports these results. The impact of the site's heritage recognition is mostly deemed to be positive, and even unanimously positive in the case of the RGSF sites (Figure 14).

Figure 14: Was the object of your recognition accompanied by an impact on the environment that you assess?  
Source: Realisation of the authors



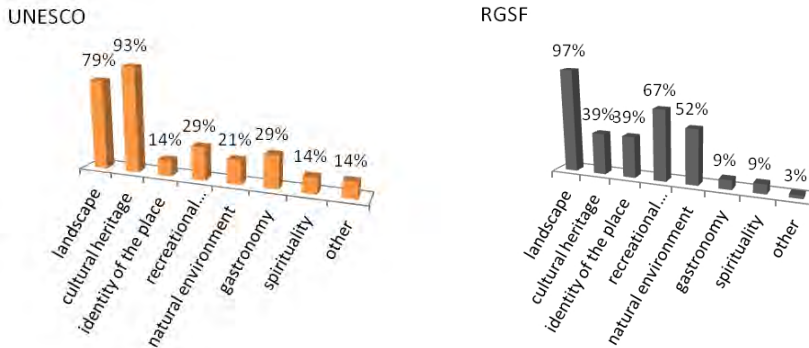
In the various case studies, the notion of landscape appears at the heart of the stakeholders' comments and the landscape plays a role as a marker of territorial identity (Mining Basin, Canal du Midi). It can be understood sometimes as a "postcard" landscape (Marais Poitevin) and sometimes as an entrance key for the heritage process of a site (Le Havre, Ochre Massif).

Through these examples, the conception of the landscape sheds light on the relationship that individuals and groups build with the territory, which A. Berque calls "mediance" (Berque, 1994). The landscape is conceptualised as the sensitive, aesthetic and affective dimension of the relationship between the material and the symbolical, "contributing to the feeling of belonging, or even to the territorial identity, in a desire to include aesthetics as a central dimension of relationships between societies and the environment" (Sgard, 2010). "The people come first for the beauty of the landscapes, as for all the major sites. For the heritage, the peace, the emotional side, the environment, for everything that is perceptible", acknowledged one of the actors of the Marais Poitevin. A feeling of belonging is built around a landscape setting which is a symbolic marker of the territory (Donadieu, 2000). It appears as the visual translation of the social enhancement of the location and offers inhabitants a familiar environment made up of multiple landmarks (Dérizot, 2004).

As shown by the stakeholders' declarations, the landscape internalises two polarities with an internal function of "social cement" in the Mining Basin, as well as an external function of representing the image that the group wants to show of its territory as in the Marais Poitevin (Sgard, 2011).

The national survey carried out among all the site managers shows the strength of the sites' landscape attractiveness in attracting visitors (Figure 15).

Figure 15: What are the motivations which lead visitors to go the site?  
 Source: Realisation of the authors



For some of the sites studied, such as the Canal du Midi, the Somme Bay, the Marais Poitevin or the Ochre Massif, the landscapes benefit from an ancient recognition which boosts tourist attractiveness. The issue of preserving the image of the place is at the heart of the concerns of the stakeholders commenting on the sites.

For others, as in the Mining Basin or Le Havre, the landscape is the entrance key to becoming aware of the value of the place. The landscape then becomes a recourse as a heritage element to build an emblem of the territory (Dérioz, 2004) and thereby a new narrative about the place.

Therefore, the landscape issue overlaps with heritage issues and questions the public authorities on the ambiguity of freezing landscapes, often inherited from a bygone rural tradition, or of projecting their designs into the landscape of tomorrow by imagining new forms of “living together”.

In the views expressed by stakeholders, the landscapes are essentially put forward for their natural dimension. The natural character of the sites as the value of the place is strongly emphasised. Gradually, nature is envisaged as a resource and is asserted as such.

This so-called natural heritage is a factor of tourist attractiveness, and then becomes a territorial resource; it can even be recognised as an “appeal product” for the territory as a whole. The resource participates in the territorialisation process by contributing to the forging of territorial identity (Dérioz, 2004). For some sites, such as the Marais





Ochre Museum, Ochre massif © Tourism office of the Pays d'Apt and Lubéron



Small white card with illegible text, likely a specimen label.

Oxyde de fer

Oxyde de zinc

Oxyde de cuivre

Oxyde de nickel

Oxyde de cobalt

Oxyde de manganèse

Oxyde de chrome

OXYDE

OXYDE

OXYDE

OXYDE

OXYDE JAUNE

OXYDE

R. REBOUL



Poitevin or the Ochre Massif, these landscapes are the main economic resource of the territory. This absence of diversification creates a strong degree of dependence on the resource landscape and generates powerful stakes to preserve it. The landscape resource proved fragile and ambiguous in a context where multiple private properties make up the landscapes (in the Marais Poitevin for example) especially since the public powers' financial means and capacity to intervene in order to maintain them are limited.

Even if the natural dimension predominates in enhancing the tourism value of the sites, their landscapes, like most European landscapes, are the result of both natural and anthropogenic dynamics over more or less long periods of time. Thus, in the Marais Poitevin, the folkloric image of the green Venice, a succession of canals bordering small meadows surrounded by tadpole ash trees, stems from the combination of the existence of a marsh and the mastery of market-gardening agriculture of the 19th century. Another example is the presence of slag heaps, landscape markers which have acquired the status of "green lungs" and are now symbols of the Mining Basin. These slag heaps and this landscape result from the aggregation of the coal mining waste from the end of the 19th century and beginning of the 20th century. The landscape of the Ochre Massif is meaningful, since it is perceived as strongly resulting from human activity, especially the management which went on over time.

Likewise, the vineyard landscapes of Piedmont Langhe-Roero and Monferrato, listed as a "cultural landscape" in humanity's world heritage, bear testimony to the strong interrelation between society and the environment. They result from a tradition which has managed to evolve from the Middle Ages to the present day, in particular by continuously seeking new cultivation methods that are adapted to an ancient demarcation of the plots of land. This cultural landscape can then be described as a "geographic area in which the relationships between human activity and the environment have created ecological, socio-economic and cultural models, and feedback mechanisms, which regulate the presence, distribution and abundance of species assemblages" (Farina, 2000).

The landscapes of the Marais Poitevin, those of Piedmont, and the slag heaps of the

North, recognised for their identity and their heritage value, in the name of arguments related to the high importance of their natural dimension, stem from this close interrelation between natural and anthropogenic dynamics. The traditional conceptions of man/nature opposition would have to be obsolete in order to analyse and devise the future of these spaces. Yet, “societies develop their environment according to their interpretation of it, and conversely, interpret it according to the development it has undergone” (Berque, 1995).

Various environmental dynamics are likely to jeopardise the sustainability of these so-called identity landscapes.

For example, “green” reconquest processes occur, raising questions in particular about the site management methods. A lack of maintenance of habitats and a strong revegetation sometimes tend to make the “identity landscape”, inherited from ancient practices, disappear. Examples are the lands laid fallow in the heart of the Marais Poitevin or the gradual development of a tree layer on the slag heaps of the Mining Basin. The places are “damaged” when they are abandoned, as opposed to tourist areas which have priority in terms of action (Marais Poitevin). Biodiversity as well as the very qualities of the landscapes are affected (Mining Basin).

The question of the management of these landscapes is then raised, especially since these territories extend over several dozen square kilometres. This leads us to re-examine the current practices of the places, as mentioned in the previous section on economic development issues. Thus, the stakeholders’ desire to freeze a certain image of a landscape comes up against natural dynamics and a sustainable investment would be required to manage it with that in mind.

Events taking place over the long term, such as climate change, contribute to the radical transformation of landscapes. This is the case, within the selected study areas, of the development of parasites attacking the belt of ash trees in the Marais Poitevin and the belt of plane trees near the Canal du Midi.

One-time climate events that have a powerful impact on the landscape such as the falling of trees following a storm contribute to raising awareness of the landscape markers of the sites. Stakeholder mobilisations are organised to restore this lost identity. For example, such was the case in the Marais Poitevin, following the storm of 1999.

In these specific cases, this mobilisation around the tree is not insignificant. The symbolic power of this landscape feature greatly contributes to the identity character of a landscape.

### **Standard tensions of land planning/development**

In the various study areas, we observe tensions, either emerging or established for a long time, between environmental issues and anthropogenic issues. Apart from issues inherent in the notoriety of certain sites, the tensions identified here have more to do with issues that are common to a wide variety of territories than with a specificity related to outstanding heritage sites.

If there must be a specificity of outstanding heritage sites compared to natural environments, it is related to the issues of tourism pressure and the effects that it can generate for some sites. It is important to note, however, that among the selected study cases, not all of them are concerned by these tourism pressure dynamics.

There is indeed a graduation of the effects of this visitation according to the studied territories. Tourism can be significant and occasional, such as daily visits, localised in a location of the site such as Coulon in the Marais Poitevin or Roussillon in the Ochre Massif. Tourism may be more diffuse, from several days to several months, as in the Somme Bay and for the Canal du Midi. Environmental consequences are inevitably diverse. They can go so far as to jeopardise the very attractiveness of the site. The tourist pressure in the Ochre Massif, concentrated in July and August in particular places (the Ochre Trail

in Roussillon or the Provençal Colorado Trail in Rustrel) generates a sharp deterioration in the environment due to trampling and, until the 2000s, a significant removal of the ochre by visitors, with the risk of a loss of the site's qualities.

In the latter case, the endangering of the site led to a greater awareness amongst the territorial actors who at the end of the 2000s undertook a Grand Site Operation to manage tourist flows in places with excessive visitor numbers.

Tensions frequently appear between site managers and environmental associations. The members of the latter raise questions relating to the consequences of tourist practices or, more broadly, of recreational uses on ecological balances. Conventionally, the debate is between the proponents of biodiversity preservation, in a bio-centred approach where man has no place in nature, and a more pragmatic vision based on the possibility of combining conservation objectives with the meeting of human needs (Salle et al., 2016).

Environmental associations are sounding the alarm bell by denouncing the threats to ecological environments, as a consequence of exploitation or excessive visitor numbers. In the Marais Poitevin, visitor numbers are related to the development of uses for tourism purposes, with the deterioration of the bank ecosystems due the practice of the bark in the wet marsh. In the Mining Basin, EDEN 62 denounces sports practices (bike riding, trails, etc.) or poorly prepared events which damage the natural environment. Contradictions appear in the Mining Basin since the blazing up of slag heaps (event involving the setting on fire of slag heaps), although it is very popular, can also be very dangerous. There can be burning on a slag heap for several years. This limits the interest of such practices and events.

Underlying these tensions, there is a trade-off between “sanctuarisation”, and therefore a protection of these areas from any human practice, exacerbated in sites recognised as outstanding, and the development of an offer that meets the growing social demand for services related to nature areas.



In sites with a strong agricultural presence, tensions also appear between the proponents of a production-oriented agriculture and advocates for environmental issues, bringing together both associations and site managers.

Intensive (agricultural) practices resulting from the agricultural revolution of the 70s have profoundly upset environmental balances as well as landscapes.

The case of the Marais Poitevin illustrates this form of tension. Rooted in a long history, the territory was gradually organised around a dried marsh (current support for an intensification of agricultural practices) and a wet marsh, which is the object of the classification under the RGSF and at the origin of the tourism appeal. The 1970s have strongly accelerated this process. The result, in the dried marsh, was a disappearance of stock breeding and a loss of quality of the meadows.

The cropland upstream of the wet marsh, since it concentrates at the surface fertilisers and crop protection products which are exposed to the risk of washout during heavy rain, contributes to the pollution of the watershed's waters and affects the aquatic quality of the biotope. Along the way, this results in major impacts.

More than half of the wet marshes were dried up in the twenty years following the opening of the Regional Nature Park (PNR) (1975). The ambivalence between the desire to protect the landscape and the intention to continue the modernisation of agricultural practices played to the advantage of the latter. Faced with the resulting landscape transformation despite the existence of a PNR charter, in March 1996 the National Council for the Protection of Nature (CNPN) gave an unfavourable opinion regarding the renewal of the PNR.

There is a complex interplay between actors of the agricultural, environmental and tourism worlds on water management issues. The tensions revolve around the declining floodwaters generating environmental damage or the lower water levels in sum-



mer, threatening tourism in the wet marsh, and conversely, the downstream extraction of water to irrigate the cereal crops. These tensions were at the heart of the adoption of the new PNR charter in 2014. The charter was not adopted until there was a step backwards in its provisions on this issue. Since the subject was conflictual, the new charter having got rid of the main issues relating to water management, no competence in this matter was entrusted to the PNR. The consensus sacrificed water management and its taking into account at the territorial level, even though this management greatly determines the marshland ecosystem's functioning.

The Marais Poitevin illustrates the hiatus between agricultural policies conducted by Europe and France in favour of an intensification of practices – gradual disappearance of the measures in the second pillar of the Common Agricultural Policy – degrading the sites' environmental and landscape quality on the one hand, and on the other, the intention of the Park to maintain small-scale agriculture through the setting up of mechanisms aimed at preserving agricultural practices that are favourable to the preservation of the site, on the initiative of the interregional park.

The recognition of the sites for their outstanding character through the classification of the site or its inclusion in the World Heritage of Humanity raises many urban planning constraints on the local scale. Strong conflicts between the guarantors of the inscription or the labelling and local elected officials appear with regard to urban planning issues, as mentioned in the previous part.

A binary approach opposing conservationists and progressives would sweep away the paradoxes at play within these territories. Several levels appear: the site's recognition which gives a particular status, a factor of territorial attractiveness, the very nature of this recognition which generates conservation responsibilities for future generations, the difficulty in transforming a territory and meeting the challenges of modern society without changing the nature of the site's landscape identity.

### Original strategies for overcoming the levels of tension

The sites cover a diversity of situations in terms of surface, geography, public ownership, etc., inevitably building a complex interplay between stakeholders. The tensions resulting from economic, social and environmental logics crystallise particularly in these territories. Their management requires particular attention due to the symbolic values they carry. Various strategies are initiated in these territories to overcome these tensions over the territory project.

To move beyond a logic of artificial preservation of outstanding heritage sites, which often depends on public subsidies for a conservative management, the use of the notion of sustainable development has become an integrative strategy for some of the territories studied. They are mostly sites with a strong territorial influence (the Canal du Midi, the Somme Bay, etc.) where environmental, economic and social dynamics are closely intertwined. Their management should be considered from a cross-cutting perspective and in a long-lasting territorial balance.

But as pointed out by J. Theys (2014), the notion of sustainable development is gradually being erased from political discourses in favour of other terms such as “transition”, “resilience”, and “de-growth”. The disenchantment aroused by the abusive use of the notion, its concomitant association with the period of the golden age of globalisation (1980-2008) and finally its conceptual underutilisation would explain its disappearance (Ibid.).

Thus, for example, with the green transformation of landscapes materiality taking place over the whole Mining Basin, with the voluntarist discourses backed by the Mining Basin Mission and the urban planning agencies, the municipality of Loos-en-Gohelle appears as the driving force of a territory project which is part of an ecological transition. The municipal strategy is organised around the willingness to initiate a citizen participation process, at the economic, cultural and social levels and at the level of urban and agricultural planning/development policies, while undertaking a local development

based on a strong ecological policy (Melin, 2013). In 2015-2016, the French Environment and Energy Management Agency (Agence de l'environnement et de la maîtrise de l'énergie - ADEME) conducted an external scientific evaluation of the method of Loosen-Gohelle and identified the town "as being a demonstrator for the management of change towards a sustainable city. [...] Driving change means setting all the territorial actors in motion to operate the ecological and social transition towards a more sustainable development model" (Perdrigeat, 2016).

At the other extreme, an ecological and economic conception of land-use planning leads in Europe to the development of new strategies for managing natural areas. As presented above, the Pumlumon Living Landscape project implemented by the Montgomeryshire Wildlife Trust in England is aimed at managing a natural area through the setting up of a financial tool to recognise the ecosystem services of this area.

Other threats – or tensions – have emerged for sites that cover a vast territory: the encroachment of the landscape by woodland or vegetation fallows is a concern since it could lead to the disappearance of a landscape ideal. Many actors promote the necessity of reflecting on the management of areas subject to strong natural dynamics from an economic perspective, most often of agricultural origin, with a view to the challenge of maintaining an open landscape.

These efforts to fight against the closure of landscapes raise questions about these constructions which are socially specific. They serve an aesthetic ideal which now represents a paradigm of open area planning (Le Floch et al., 2005). For some actors, mainly environmentalists, landscape closure is, on the contrary, defended for the ecological qualities it favours. Conflicts over landscape representations in the expectations of territorial actors appear and lead to antagonistic planning/development paradigms.

As previously mentioned, the notion of landscape is strongly involved in the various study sites. Whereas the heritage dimension of the landscape has been anchored in the French legal frameworks for a century for the purpose of protecting its materiality, a new discursive use of the notion questions the landscape in its immaterial dimension.

For example, in the Marais Poitevin, the landscape appears as a necessary recourse to build a federating discourse.

The landscape has recently emerged as a common good (Sgard, 2010). As emphasised by elected officials, landscapes are part of our heritage in the same way that a castle is. Yet it is when the landscape is threatened, for example in the case of the land laid fallow in the Marais Poitevin, that the expression of the landscape qualities of the locations is verbalised (Trom, 2001). The prospect of a disappearance of the landscape enables the relationship between individuals or groups and the territory to be expressed, or even qualified (Sgard, 2010). The landscape is then discussed, the diversity of the values it embodies is presented, and its future is questioned. It becomes political (Ibid.). The landscape becomes an object of mediation where its material and symbolic significance is discussed by the territorial actors. Thus, the landscape approach initiated by the Marais Poitevin Interregional Park during the Grand Site Operation at the beginning of the 2000s enabled stakeholders with traditionally opposed interests (environmentalists, farmers, association of the wet Marsh in charge of waterway management, elected officials, inhabitants, etc.) to be collegially brought together. Addressing the landscape transformation was the entry point to build between a diversity of actors, with their own logics, a common dialogue aimed at reaching a balance between preservation and development.

This first stage of opening up a dialogue between stakeholders in the Marais Poitevin through the landscape enabled the emergence of territory projects. The first one, implemented in 1998, then included in the OGS process, aimed to achieve a development and restoration plan for the wet marshes (Plan d'Aménagement et de Restauration des Marais Mouillés). The landscaping and maintenance works conducted enabled the plots affected by land abandonment to be restored and the landscape to be re-opened. The plots were made more accessible (bridges, livestock pens, livestock vehicles, etc.) and were developed for livestock farming. A Park officer assists the stock breeders with the aim of ensuring the sustainability of the site's agricultural operation and guaranteeing its maintenance. This perpetuation and this enhancement of the agricultural landscapes of the Grand Site contribute, furthermore, to the site's attractiveness.

Today, the Marais Poitevin PNR pursues this landscape approach with the aim of collectively anticipating the future transformation of the landscapes. An emerging ash disease (Chalara) leads to the progressive disappearance of the trees or of this species and thus has a lasting impact on the wooded belt of the Marais Poitevin, one of the major characteristics of this landscape. The setting up of landscape workshops, organised by the PNR and the Landscape School (École du paysage) of Versailles, increases awareness of this landscape transformation and makes it possible to anticipate collectively with inhabitants, farmers, elected officials, etc. the replanting of tree species which are part of the identity and territorial development of the site.

The OGS process of the Salagou Lake is part of a similar dynamic where the expression of the landscape representations of the site's stakeholders was the starting point of a dialogue on the future of the territory.

The European examples already mentioned (Emscher Park, the Valle Salado, the vineyard landscape of Piedmont, etc.) also attest to this collective mobilising of actors by the landscape project.

In these different cases, addressing the territorial issues of these areas through the landscape led to the collective sharing of values and stakes related to the areas. This is consistent with the points of view of H. Davodeau and M. Toublanc (2010): the landscape becomes as much a means (a tool) as a goal of planning/development. As an interface object, it offers a space of dialogue, addressing multiple issues: agricultural, urban, tourism, ecological, social... This approach then makes it possible to link these issues by seeking to decompartmentalise the sectoral logics to integrate what H. Morin calls "complexity" (Davodeau and Toublanc, 2010). Candau and Michelin (2009) describe it as landscape mediation, defined as "the taking into account of different viewpoints on the area to contribute to the development of a localised action or of a collective project".

Finally, questioning through the landscape the problem of managing outstanding heritage sites, where anthropogenic and natural dynamics are closely interlinked, makes it

possible to move beyond the classic rationale of nature/society opposition. “The landscape is a relative and dynamic entity where nature and society, the viewer’s gaze and the environment, are constantly interacting” (Berque, 1994).

However, the notion of landscape, in the way it is used by the various actors, brings out an important hiatus. This is all the more true for sites whose outstanding features require particular attention. The notion of landscape can for example be used by the actors of a site in the name of the preservation of a territorial identity that takes as its reference the memory of the past. From this perspective, the landscape becomes an object, a setting, whose major issue lies in the artificial preservation of its forms, but also in “perspectives and values underpinning its codification as a landscape” (Sgard, 2010). This vision, which stems from a heritage logic which has been anchored in French law for more than a century, conveys the utopia according to which any transformation, whether it is anthropogenic or natural, can be halted. Indeed, historically, the notion of landscape is reserved only for outstanding heritage sites which have generated specific heritage protection tools. But with the Landscape Law of 1993 and the European Landscape Convention of 2000, it has extended to everyday, ordinary landscapes. To understand this everydayness, as traditional protection mechanisms reveal their limits when it comes to taking into account the ordinary and the dynamics of inhabited areas, the landscape was projected into the heart of local policies (Sgard, 2010) in territorial projection/planning tools such as the SCoT, PLU and PLUi.

Thus, its social dimension, the territory project it materially reveals and, therefore, the future-oriented perspective it gives rise to, make it an infinitely political object. The landscape project encourages one to ponder the future of the territory and to convene the different views of the stakeholders around the notion of landscape. An object as much as a territorial forecasting tool, it offers a space for “mediance” between the stakeholders.

Designing the management of outstanding heritage sites from this perspective is a matter of changing the paradigm. The issue is then the nature of the link between economic and socio-cultural drivers: some sites being essentially in one of the two spheres, while others try to combine them. In this power relationship, the landscape is the material revealer and the environment is constrained by these trade-offs.

One no longer seeks to federate the actors around a past memory embodied by an identified landscape, but to co-build a shared future between actors who, traditional-



Somme Bay, © Jean-François Ruault

ly, do not intervene in decision-making about land use planning (inhabitants, farmers, economic actors, etc.). Sites such as the Marais Poitevin or the Salagou Lake perfectly illustrate this paradigm shift. The landscape becomes a projection instrument based on a dialogue process between the representations and expectations of the territorial actors (Pernet, 2014). Whereas special attention should be paid to economic issues due to their power to transform these landscapes (see above), the identity and environmental issues are convened in the same way in land management. The development of the site would no longer have only a tourism purpose, seeking to enhance a landscape image, but would then integrate the daily dynamics which inhabit and transform the territory to build a landscape which is a common good. But making these outstanding heritage sites part of a territorial complexity raises questions on the legitimacy of decision-making bodies in initiating such an approach. Should it be initiated by institutionalised or emerging figures? How can the balances between economic, environmental and social issues be guaranteed?

This aims at questioning within these multi-territorial, multi-actor and multi-instrument territories, the place offered by the landscape in the building of a space for dialogue. This in turn questions the representations of the area and the stakes at play there, as well as the types of governance that can be initiated and their efficiency. And in return, this raises questions about the particularism of the management of outstanding heritage sites compared to more ordinary territories where similar approaches are initiated.



## Heritage fates and a sociocultural appropriation

Using the concepts laid down in the introduction and the materials gathered during the field studies, the aim is to specify the conditions of sociocultural appropriation of outstanding heritage sites, the limits, obstacles and evolutions to which it is or is not subject. This leads us in particular to focus on several dimensions of heritage in its dynamics and, in particular, its mediation capacity for linking the past, the present and the future, but also, the here and the elsewhere. How in each place is the articulation between the economic sphere and the cultural sphere, always present, or their dialogical transcending, achieved? And finally, what is the meaning of heritage in its own trajectory and in common trajectories?

### Multiple and complex heritage processes

Since the end of the 20th century, at the origin of the heritage process, we frequently find “the crisis” or “a crisis”. In times of change, marked by a strong uncertainty about the future, heritage is perceived as the last resource. This movement is found for each area studied. Heritage, “is something that will never be taken away, externalised from us” explained an actor of the Mining Basin. For example, in the Mining Basin, this involved the study of slag heaps at the beginning of the 1980s, 10 years before the closure of the last mine. It was carried out by “naturalist militants” who revealed a high biodiversity of the slag heaps, justifying protection measures. These studies were simultaneous with the closure of the last shafts (1990). The strength of the tensions explains the diversity of trajectories, some of which involve destroying the collieries, whereas others advocate their conservation in the condition of wastelands, before other uses can be envisaged. The same holds true for the Ochre Massif. The start of the heritage process was simultaneous with the end of the ochre quarrying activity, in parallel with the rise in tourism development of the Lubéron territory. As previously seen, in the Marais Poitevin, the changes affecting agriculture can explain its preservation, but also the tensions associated with them, due to the coexistence between a production-oriented agriculture and the establishment of alternative agricultures, which make sub-

stantial use of environmental amenities. In Le Havre, the industrial and harbour crisis resulted in the start of a profound identity change, to foster tourism development and attract new activities. The urban renewal and the promotion of the Perret architecture accompanied this change which was all the more profound since it accompanied itself a change of municipality.

But other situations are possible. Thus, as was the case for the Millau Viaduct (Senil, 2011), the study confirms the possibility of a heritage designation simultaneous with the construction of the object. It accompanies the change of image for an identity transformation characterised by a strong commitment to openness. This is the case of the Canal du Midi, for which the construction phase was the occasion of many visits to a symbolic structure which “inaugurated the modern times of creating navigable networks”. It rapidly became “the most striking element of the territory crossed”. The decision to abandon the gauge standardisation project, and therefore its conservation in its initial state, marks the end of the transport uses for which it had been built, and the emergence of new uses. It signals the end of a known world at the same time as the emergence of a new one, to be built. The omnipresent selection process throughout the heritage process reflects values borne by the actors, without these values necessarily being made explicit. The new system to be put in place is not clearly stabilised nor shared.

The process and its complexity as well as its outcomes depend on the interplay between stakeholders. In particular, the study phase is decisive for understanding the subsequent management methods. The observation of inscription or classification processes shows a high diversity and complexity of situations and it is sometimes difficult to identify a single leading structure, as shown by the analysis of governance developed above.

The diversity of actors and functions leads us to question the notion of a leader in a multi-level governance (see above). The arrangements can be characterised through

different examples such as the Mining Basin Mission, the Joint Association responsible for the Facsimile reconstruction of the cave known as Grotte Chauvet, Voies Navigables de France for the Canal du Midi, the city of Le Havre, the Regional Nature Park of Lubéron.

Thus, rather than speaking of a manager, one should differentiate functions. The ownership of the sites is often very complex. This complexity deserves to be observed in order to understand the possible room for manoeuvre or the potential bottlenecks. Other operations are part of the regulatory follow-up by ensuring the follow-up of requirements related to the inscription or classification. In this case, the State services responsible for the control of urban planning operations play an important role, in addition to identified managers. The restoration and maintenance operations involve project programming and fundraising missions. The Joint Associations and natural parks are well positioned to carry out the programming functions, but other actors take action such as Voies Navigables de France (VNF) for the Canal du Midi. The project management is then distributed among these programming structures, as well as others such as the communes, intercommunalities, associations or other partners. Thus, in the Mining Basin, the management of slag heaps as Sensitive Natural Areas is directly ensured by the Departmental Council in the North and by a Joint Association (EDEN 62). Finally, there is a growth of environmental education missions: they are carried out by associations, such as the association “Maison du Marais Poitevin” (House of the Marais Poitevin) or by Permanent Centres of Initiatives for the Environment (CPIE). They thereby constitute places of interface between “citizen actors”, regional and local authorities and the State in the management of sites. The visits to cultural sites are most often performed by guides speakers within the framework of organisations related to Tourism Offices or structures bearing the label “Villes et Pays d’Art et d’Histoire” (VPAH - Town and Country of Art and History). All of this leads to a complex management system in which operations can be broken down as follows (Table 18).

Table 18: Operations and actors  
Source: Realisation of the authors

Operations	Actors involved
Follow-up of the inscription or label, control	Management structures and State services
Works programming	Management structures
Carrying out of the works	Management structures, communes, intercommunalities, associations, specialised companies
Environmental education and heritage mediation	Local associations (e.g. CPIE) and structures bearing the VPAH label

The label appears as a distinctive sign. Thus, among the multiple issues of heritage mobilisation, we find this logic of transformation and identity renewal of the territories, with the underlying idea of strengthening their attractiveness. Tourism development is always made explicit, residential attractiveness is more rarely stated. It is in Le Havre, through the renewal of the urban centre, and in La Chaux-de-Fonds through the growth of watchmaking town planning. It is also clear for certain sites of the Mining Basin through new urban designs based “on networking miner dwellings, and on their inclusion in a green and blue network consisting of the canals and the so-called ‘cavaliers’ (vestiges of transport equipment, former railway lines)” (Urban Planning Agency of Artois). Finally, the preservation of natural environments is reflected in the rise of an enhancement process which hybridises site preservation operations and tourism improvements (roaming, environmental and cultural heritage education) in particular in the Somme Bay and for the site of the Pont d’Arc.

The studies and political strategies most often generate procedures of classification and/or inscription under labels whose number is steadily increasing. There are more than 40, among which the inclusion on the world heritage list (UNESCO) or the label Grand Site de France are “the epitome to be reached”. Each of them carries principles and rules generated by the institutions which produce them, in the face of which the territories can undertake various strategies.

Due to the richness of its geological heritage, the Lubéron Nature Park cumulates several labels within different perimeters: nature reserve, biosphere reserve, Operation



Grand Site project (Ochre Massif) and Geopark. Each of them generates specific action programmes, thereby consolidating the structure of the Park in a supporting and coordinating engineering position. The preferred position is that of Project Management Assistance to the local authorities responsible for implementing the works. It is being increasingly challenged by intercommunalities, which claim this capacity. The takeover of the Operation Grand Site by the Community of communes of the Pays Apt Lubéron reflects this movement. Conversely, the Operation Grand Site of the Pont d'Arc is today increasingly associated with the World Heritage inscription of the Pont d'Arc Cavern.

The reverse situation is more common. It corresponds to the case where the World Heritage inscription is followed by the labelling of certain objects as Grands Sites de France or their classification under the Law of 1930. This is the case of the Nord-Pas-de-Calais Mining Basin with the classification of several slag heaps which is underway.

Finally, other articulations may be noted. This is the case of the label "Ville et pays d'Art et d'Histoire" (Town and Country of Art and History) which remains limited, depending on the local authorities involved. More than the heritage value, the labelling aims to highlight the quality of the management associated with heritage objects. For example, the label is used by the city of Lens to create tours, some of which include the history of the Mining Basin.

The diversity of procedures and rules is combined with that of the forms of exhibition. The museum remains the most common form of this process. Far from the conventional form of the place "of exhibition, research and delight"<sup>62</sup>, we find a high diversity of places: a show flat in Le Havre, industry museums in La Chaux-de-Fonds, a historical

<sup>62</sup> With reference to the definition of the museum

centre in the Mining Basin. The Delloye pit in Lewarde was closed in 1971. In 1973, the Houillères decided to turn it into a museum which opened in 1984 in the form of a mining historical centre. The stated ambition was to mix audiences: inhabitants of the sites, holders of memory on the one hand, and tourists on the other hand.

Some sites will have a recreational destiny, with for example the installation of an artificial ski run in Noeux-les-Mines, or the development of sport activities on the slag heaps and networks associated with brownfields such as the former railway lines (“cavaliers”), the bodies of water and canals. This diversification is also found in Emscher Park.

Other sites will serve as a base for educational activities in the field of the environment, by associating “soft” mobilities, wildlife and flora observation activities and the discovery of local know-how. The Somme Bay offers an example of these new educational and recreational activities, the purpose of which is to draw in a wider audience and extend the tourism season.

### **A dual alterity driving force**

The outstanding heritage sites selected in the context of this study all turn out to be inhabited. In that sense, they welcome various publics and host various activities. Their inhabitants have to deal with the heritage and the number of visitors they welcome. Being heritage entails dealing with the past and being de facto part of a transmission process. Being visited entails having to deal with the foreign and coexisting. This dual operation of transmission and coexistence is a significant feature of the site’s inhabitation and enhancement.

Defining visitation is always problematic. The national survey reveals that a narrow majority of managers use systems for tracking the number of visitors. Despite this significant shortcoming, more than 2/3 of the managers report having more than 500,000 visitors. Situated mostly in low density rural contexts, this visitation has a strong impact









on the territory. Because while these sites are visited, they are also inhabited, used, planned, and occupied by a local population. Therefore it seems that the analysis should focus on the link between this visitation and the territory. Each territory expresses a “dual carrying capacity” which reflects a ratio between tourists and inhabitants, with tangible as well as symbolic impacts. The perceptions change according to the sites, the seasons, the density and the people. In that respect, inhabitants of Le Havre do not have the same perception of this visitation as those of Roussillon. Yet very few of the actors we met raised this issue in those terms. The use of outstanding heritage sites is envisaged everywhere as an essential economic driver and its development is often considered overall as a positive sign for territorial dynamics. Indeed, few people are delighted at the decline in this momentum and the various tourism observatories created are there to measure it.

Various strategies are implemented to transform this visitation. The first one which aims at extending the season pursues a dual objective: increasing and spreading the number of visitors temporally. This intention is present around sites with high visitation rates which have a structuring impact on the territory: the Marais Poitevin, the Gorges of Ardèche, the Ochre Massif, the Italian Piedmont, and so on. This is reflected in increased local visitation, but also in the search for a different public. The second strategy aims at spreading visitor numbers over a more extended perimeter. This choice is made for important sites which constitute points of attraction that have to be used as relays (Grotte Chauvet, Ochre Massif) but also by territories that wish to exist as networks of balanced locations (Emscher Park, Italian Piedmont, Somme Bay). Finally, the third strategy used in a complementary manner and on a micro scale is reflected in the willingness to channel visitation within particular perimeters. This is translated into prohibitions, incentives or voluntary omissions.

In most of the sites studied (excluding the Ochre cliffs of Roussillon and the Canal du Midi), the extension of seasonality seems real. In the Marais Poitevin, the length of the season increased from 2 months 20 years ago to 6/8 months today. The observation is the same in the Somme Bay. This evolution is anchored in a relatively high local visita-

tion. In Ardèche, the Pont d'Arc Cavern has this objective. Indeed, the capacity of the territory is highest during the summer holidays. In Vallon Pont d'Arc, the population increases from 2,500 inhabitants to 35,000 persons in summer. Whereas the first years seem to indicate that the challenge can be met, the overall visitation to the Cavern is dwindling and its potential lever effect is to be defined. But this influence of tourism also has town-planning consequences on this village. Each year, 400 urban planning authorisations are requested.

Finally, the sites of Le Havre (urban area), of La Chaux-de-Fonds (3000 visitors/year), of the Valle Salado (70,000 tourists) and, to a lesser extent, of Piedmont (130,000 persons distributed over a vast territory) are exceptions. For these sites, another score is played. Visitation does not appear yet as structuring and the issues worked on are elsewhere, by default or by choice.

Outstanding heritage sites are mostly, but not systematically, highly frequented, with stabilised or increasing volumes. Flow management logics and practices aimed at managing the coexistence between tourists and the natural and human environment, are being implemented everywhere. Indeed, the resident/tourist ratio is often greater than 1/10 with the exception of linear, areal or urban sites. Within them, what J. Viard (2000) calls a "dialectic of the agora and the landscape" is falling into place. It is experienced locally and attracts an increasing number of visitors in these previously marginalised and now sought-after places. More recently, this trajectory of fostering desire and the inversion of representations was sought by sites such as Le Havre or the Mining Basin

The observed visitation reflects a convergence towards places which express positive and shared values. These dynamics are part of a double combination which has various local translations. The national survey reveals that for managers, the sites are markers of the territorial identity. This observation is put forward by 74% of the Grands Sites de France and for 60% of the UNESCO sites. In parallel, the motivations for visits include a strong cultural, heritage and landscape dimension for UNESCO sites as well as for RGSF sites although they are more diversified (with an aesthetic predominance). These

results, when put into perspective, tend to show that the recognition of natural sites is stronger for inhabitants and, conversely, that the recognition of cultural sites would be greater for tourists. A nature space should therefore be used to be considered as meaningful, unlike cultural sites which exist regardless of distance. This hypothesis suggests that the heritage mediation of natural sites should be consolidated.

If we put these results into perspective with those questioning appropriation, the identity issue asserts itself. Among the managers, 33% consider that their UNESCO site is entirely appropriated against 16% for RGSF sites. These results have to be assessed against those mentioned above which suggest that RGSF sites have a more important place than UNESCO sites. Looked at together, these results indicate that RGSF sites are natural sites perceived by their managers as important identity markers, but hardly appropriated by inhabitants and, conversely, that UNESCO sites are cultural sites which are appropriated by inhabitants, but have a less marked identity. This proposition is nuanced by the field.

The Marais Poitevin has a very strong, but relatively forgotten, anthropogenic dimension. The value is essentially a landscape one. The loss of the identity value of the Marais Poitevin over generations was put forward by the persons interviewed even though tourists come to discover an identity and a territory. And whereas the awareness raising and mediation mission has almost disappeared with the closure of the houses, after the loss of the PNR status, the reconquest of the label shows the will to make inhabitants, neo-rural people and young people rediscover the identity of the Marais Poitevin. This problem also occurs in the Ochre Massif, whose history is also marked by a strong anthropogenic action, today diluted in the dominant form of the secondary residence which is destroying the identity of the territory.

The Somme Bay, a natural, but inhabited and managed landscape, is a source of local pride. As a lived-in and used space, it is appropriated. Tourists are aware of the environment they find themselves in and use significant external mediation activities. The Gorges of Ardèche, on the contrary, suffer from a disconnection between the population which does not directly inhabit the site and the tourist population which some-

times becomes the exclusive occupant. A nature territory, with a local economy oriented towards campsite services and which prizes the sun and rivers, the OGS provides this link. The cave known as Grotte Chauvet, an eminently cultural and theoretically complementary site, is not always identified by the inhabitants. What should be done with this outstanding Cave? The inhabitants seem disconnected from this invention which is paradoxically very ancient, but recent in the history of the territory. And whereas the political narrative was able to rapidly place it at the heart of the departmental and regional project, the appropriation by inhabitants takes significantly longer.

The Canal du Midi has been marking the landscape of the territories it runs through for centuries. It inaugurated the modern age, industrialisation, transport, when passageways created intense links with the territories crossed. Today, the new passageways are becoming sealed corridors, and the territories are no longer always integrated around the Canal. The end of transport and life on the water have dissociated water from land, and have made the Canal a support for tourism practices, at the risk of keeping it away from the inhabitants.

Inherited from the modernity and the history of the last centuries, Le Havre and the Mining Basin share the hope for local re-mobilisations. Born after the destruction, with the image of a cold, mineral, Stalinist city, Le Havre benefited from an elitist re-reading of the city which ultimately restored the pride in living there. Similarly, in the Mining Basin, the end of a dominant mono-activity, destructive of an identity anchored over the course of several centuries, makes room today for a slow reconquest of the past history, whose forms and intensity vary depending on the locations. In both cases, internal and external mediation is essential and the voluntarism of initiators is a determining lever.

Outstanding heritage sites are not part of a single identity dynamic. Whereas some sensibly became part of it, others were rejected. In the latter case, their enhancement then corresponds to a rehabilitation of the local history and tourism development is a marginal complement. Finally, each groups projects upon the site values that make sense for its vision of the future. Thus, it appears that the site is not always an identity



resource for the territory, it is a resource for redefining the representations of its future. The general vision involves the place and publicises it according to its needs. Outstanding heritage sites therefore appear as major places of “otherness” built on coexistence or even confrontation, but equally as places of identity that gather together and distinguish. The heritage is then mobilised for its dynamics and its mediation capacity to articulate the past, the present and the future, but also the here and the elsewhere.

Cultural practices are central to bringing this identity alive, to build and consolidate it. The social dynamics of the territory are played out there. Outstanding heritage sites, major places of transmission and coexistence, therefore specifically question this entry.

Some sites live through these practices. Such is the case of landscape sites. The Marais Poitevin hosts cultural practices related to the anthropogenic shaping of this landscape. Nevertheless, for tourists, the practices are essentially sports and contemplative activities which may be weakly anchored in the history and functioning of the Marsh. Conversely, the Somme Bay has a cultural life which is anchored in the landscape through hunting, picking and fishing. This dynamic is even more present in the Valle Salado which has a responsibility to reactivate these practices as failure to do so would lead to the landscape being damaged. The Canal du Midi suffers from a lack of commitment and appropriation. Only rare initiatives such as the museum and garden of the Canal or an association of boatmen contribute to it. Finally, the cultural practices related to the Canal are managed by tourism service providers which maintain navigation, but completely forget the past. The boatmen are now marginalised and their culture is facing extinction. Only one association, “Vivre le Canal”, attempts to keep this immaterial heritage alive through a mobile but temporary exhibition. For the inhabitants, the disconnection between the territory and its Canal is increasing.

The cave known as Grotte Chauvet and the Gorges of Ardèche are two discovered sites which the local society integrated at the same time as tourists. Discovered in 1994 and closed to the public, the Cave remained on the margins of the territory’s history despite the continuous efforts of the managers. The Gorges, although managed on their

slopes, were avoided. On this stretch, the river did not serve as a communication channel. Locally, the cultural practices related to these sites consist essentially of sports. Speleology and canoe practice are very present at the school and associative levels. By contrast, the link to the prehistory is not obvious here with the exception of school hours. As for mediation practices, they are very different. In the Gorges, they are almost non-existent with respect to the flow. On the contrary, they are central with the Cavern. The tourists and inhabitants are aware of the interest of being open to the site and not vesting it with their own values.

Finally, the Cavern and the Mining Basin share the ambition of making the inhabitants (re)discover a whole chapter of their past. But in the North, the social and cultural dimension of the Basin is central. This society, entirely organised around extraction, has lived in a landscape it has contributed to building. Nature and the urban environment have been shaped by this common history. The whole local strategy is then to help conceive it and is aimed at making it emerge. Around the Ochres, the SCIC Ôkhra also shares this ambition. By seeking to conserve the knowledge and techniques, to transmit and innovate, it disseminates the know-how through traineeships, conferences, creation workshops, and performs real mediation work. There too, the approach undertaken does not weigh much in the face of territorial inertia.

In Le Havre, this changeover was based on a refounding event. With the Perret exhibition on the poetics of reinforced concrete, the Malraux museum acted as a trigger. Since then, inhabitants have acted as ambassadors, welcomed visitors, and some owners have even requested the classification of their apartment. New cultural practices are emerging. They are based on the way of inhabiting the place to build and publicise it in return. Here again, the initiators are aware of the necessity to reconnect the population to its past so that it can look serenely to the future.





Gorges of Ardèche, © Laure Cormier





### **Multiple paths to balance**

The emergence of new practices, in particular memorial and tourist practices, raises the question of the “reassignment”. Tourism proposes a “rehabilitation” of traditional and, furthermore, non-competitive practices. This is what Jean Viard calls “economy of reuse” of what he calls the “already there” (Viard, 2000).

Through the wide range of phenomena that it includes, the cultural dimension examined here poses a great difficulty for impact measurement and analysis. Regional science has been attempting this integration and this convergence for some years. The culture is then questioned no longer only as a cultural product within a closed cultural economy, but as a dimension which permeates the territorial dynamics and the economy. Ultimately, the territory appears as the “result of a permanent dialogue between economy and culture. [...] The dialogue implies that the two paradigmatic poles of interpretation of the regional fact are present and that neither of them can encompass the other or deny its existence.” (Khan, 2010). Five situations, or combinations, can then be identified.

A first case includes areas whose driver appears essentially economic. These outstanding heritage sites profit from economic rent dynamics. The commune of Roussillon is emblematic with the creation of the Ochre Trail and its toll which made it possible to internalise it. In Ardèche, despite renewed initiatives, the territory still largely corresponds to this pattern. Here, the main rent is inherited with the Gorges of Ardèche, but it is also largely delegated with the Cavern. This results in making uncertain local political strategies that stand out from this very profitable wait-and-see attitude.

A second case includes areas whose driver appears to be mainly socio-cultural. Stemming from crisis situations, these dynamics have a very political and voluntarist dimension. The Mining Basin wants to implement an overall strategy which seeks to create a local cultural change. In Le Havre, the inscription process is also strategic. It aims at

making this unattractive territory an object of pride and all the better if it becomes a tourist destination. The IBA project in Emscher Park is also notable. It was aimed at reinventing the future of the territory and making the landscape productive again, no longer to create goods, but relationships.

The areas marked by a dialectical functioning between these two spheres are based on economic dynamics governed by a strong political strategy. In the Somme Bay, this is reflected in a public administration of sites, facilities and articulated approaches (soft mobility, management of the public, enhancing the value of local products) which direct the development path. In the Valle Salado, the restoration of the site involves its operation and therefore its profitability. Tourists visit the site when it is in operation and the production is mostly sold to them. The two are therefore interdependent.

The areas characterised by dialogical relationships are more complex both to define and to manage. Defined by E. Morin (1982), who expresses in this way the merging into a complex unit (i.e. at once complementary, competing and antagonistic), they include the cases where “two or more logics, two principles are united without the duality being lost in this unity”. They differ from the dialectics by an acceptance of the maintenance of the difference between the two logics. In France, the Marais Poitevin is a textbook case. It integrates on the scale of a territory two antagonistic rationales: a production-oriented rationale in the dried marsh and a heritage rationale in the wet marsh, which are interdependent. On its wet part, it represents an anthropogenic site whose tourist value often seems to be natural and related to the landscape. Tourism here is a compromise economic activity, which values protection while creating economic wealth. The Canal du Midi also fits with this pattern. It has a linear heritage rationale of contact which draws its value from an inclusion in a preserved territory which has very few benefits in return. This deficit results in a lack of appropriation which further strengthens the antagonism and creates significant management difficulties.

La Chaux-de-Fonds in Switzerland is another case. Whereas the watchmaking industry marks the landscape, its attraction for in situ value enhancement is non-existent.



This industry no longer benefits from saying that it comes from there and in opening up locally. Although it is anchored in the place, it prefers to communicate on the “Swiss made” and on the globalised and hyper connected places visited by the jetset (Table 19).

Table 19: The situations of the study areas, drivers and obstacles  
Source: Realisation of the authors

Economic driver	Ochre cliffs of Roussillon, Grotte Chauvet
Socio-cultural driver	Mining Basin, Le Havre, Emscher Park
Dialectics	Somme Bay, Valle Salado, Piedmont
Dialogics	Marais Poitevin, Canal du Midi, Chaux de Fonds
Balance	Some places which mobilise both and strengthen them (e.g. Loos en Gohelle and Okhra)

Thus, articulations, convergences and synergies are observed in all the areas. The willingness to reconnect the two spheres is found everywhere. But change is sometimes blocked by the economic dynamics which are not prone to change in these sites which are in a rent situation. At the same time, this sphere is often so important that it structures the other one. Thus, in some very touristic communes, economic dynamics very naturally determine the social, political and cultural organisation. Finally, all these areas associate trajectories of balance and others which oppose it. The politicians are often aware of that and try to limit the impact of the latter, not without difficulty.

The national survey reveals that the initiative of the processes lies with or is strongly supported by local actors. The designation, largely used in the past, is therefore out of date for these sites. Nevertheless, the initiative of the process may not be shared locally. The survey also shows that a low initial appropriation of the site negatively influences the perceptions of the initiatives undertaken which are then more easily felt as

imposed. With regard to the population, this current attitude towards the site and the management systems reveals three positions: the majority which is rather favourable, the “pro” and the “anti” which account for around 15%.

For the managers, these inscription or labelling processes lead to a significant increase in appropriation correlated with a strong rise in visitor numbers. This result is unusual. It seems to show that appropriation and visitation are compatible.

The Marais Poitevin associates an economically important zone where land pressure on farmers is significant and a zone where heritage is at stake and which is appropriated by the few owners of plots of land who still use them. Inhabitants of the territory have lost these traces and are constrained by the low accessibility. The disconnection between the Marsh and the inhabitants, in particular newcomers, is strengthening. Although accessible, the Canal du Midi also lacks appropriation. The memory of the Canal is not enhanced with the exception of that of its builders. It is a marker of the landscape, but very few associations or local people use it. In conurbations, it hosts on its banks industrial activities to be hidden. Finally, the Canal appears fragmented, only tourists are the link. The individual sponsorship attempt to finance the replanting does not work. The case of the cave known as Grotte Chauvet is more ambiguous. A local elite is largely involved whereas the population as a whole shows passivity. The appropriation locally has to make light of the difficulties related to the invisible, to the magnitude, to the universality and for some, with private delegation. On the contrary, for the Gorges, the appropriation is strong for professionals and by some inhabitants who develop practices specific to the place. The environment remains relatively inaccessible and puts a brake on a shared appropriation. The Gorges remain an adventure ground and for some, canoeing is a tourist activity. Finally, in these different areas, to which the Ochre cliffs of Roussillon may be added, the local people leave things be.

The cases of the Mining Basin, Le Havre, La Chaux-de-Fonds and Emscher Park are different. In the Basin, the inscription helped to produce knowledge and to begin to change the way the past and the local identity are seen. More than anywhere else, the aim was to reappropriate the history, to redefine what brings people together and to share values for the future. But there is still a long way to go. In Emscher Park, the volunteer commitment was very strong, but it made inhabitants and their commitment to the initiative the condition for its success. The implementation of many projects related to agriculture, aimed at involving local people, is symbolic of the willingness to work on attachment to the land but also on bonds between people. In Le Havre, the initial recognition initiated by experts was international before being resident and local (Gravari-Barbas, Renard, 2010). The awarding of the label served that. In La Chaux-de-Fonds, the aim is “to invent a treasure”, the watchmaking town-planning was designed for UNESCO and the file was compiled by professionals. The number of visitors is still limited, expert visitation is predominant and, here also, “reading” keys have to be provided to inhabitants.

The cases of Valle Salado and of Piedmont are unique. The historical Comunidad which brought together all the owners-operators and organised the 900 year old management methods disappeared at the end of the 20th century. In 1998, a company was relaunched to re-centralise the ownership titles. Finally, a Foundation was created in 2009 which was entrusted by the salt workers with the ownership of the production areas for 90 years. Although politically-backed, the initiative de facto mobilised all the producers and the aim was to recreate a local identity, perceived as essential to the sustainability of the site. In Piedmont, the rationale of diversification and qualification ongoing since the 1980s was largely based on civil society. The Leader policy and its Local Action Groups strengthened the process.

Any site is designated as heritage by a “holder”. The question is to know whether the associated rationale is inclusive or exclusive of other actors. The labelling results from decisions that are external to the territory. It makes a separation between the holder and the manager official. Indeed, the inclusion in the World Heritage of Humanity makes humanity the “holder” whereas the manager is local. In the same way, the awarding of the Grand Site de France label also generates a gap between the national owner and the local manager. This issue does not pose a problem in all the areas, but particular attention should be paid to it.





Finally, at first glance, the heritage seems inescapable, obvious and essential. The conceptual approach and the results of the analysis of the study areas show deviations from the model. To say that the heritage is a common good is not sufficient. It include rationales to be articulated and managed, which require the setting up of a real “heritage governance” (Gravari-Barbas, 2002). The sites are not only to be preserved, but also to be inhabited. All bring together inhabitants who have to do with the site and with the visitors, which makes the management and the project much more complex. This observation is also strengthened by the fact that these dynamics take place in contexts of crises and changes, which engage the sites in identity dynamics which extend beyond them. More than ever, the issues of selection, labelling and management should encourage us to ask: who selects and why? Who awards the label and for whom? Who manages and how?

The final assessment is overall not too optimistic. The local actors are very often in a situation of wait-and-see and passivity when they are not in a deepening of conservatism. Even if the State no longer has the monopoly, the “large” heritage remains the business of professionals among which private operators assert themselves, engaged in positions of service delegation which keep the territorial actors at bay. This status quo situation reflects the idea – partially verified - that these outstanding heritage sites constitute incomes for their owners only, without the possibility of extending them to other actors and uses. Whether they are inherited, delegated or worked, they can then place the site in a situation of fixed capital (stock) and not of available (‘activable’) resource, through flows of both visitors and actors likely to use these pieces of heritage as resources.

Fortunately, some locations are committed to innovative voluntarist processes. They involve cultural creations, educational activities, events and meetings likely to induce new relationships with heritage objects. In certain situations, they mobilise them in trajectory changes, or even transition processes, linking the long history of the territories to contemporary changes. These eminently political issues question the appropriation capacity of local societies and take us back to the hypothesis of a facilitating anchorage even though a number of positions and procedures do not facilitate it. However, it seems useful to reconsider heritage in the image of the territory as a real collective construction, capable of linking or equating logics built in difference. Thus, whereas its (heritage) development is often drawn towards tourism issues, involving the inhabitants in the definition of public policies, including tourism policies, would make some sense. To this end, it is necessary not to consider them only as “ambassadors”, but as actors that are truly engaged in the territory which also happens to be visited. Symmetrically, involving visitors in the site’s development, but also in activities which may be developed there, is an idea which is sometimes tested. The example of the building/restoration sites open to the public is emblematic in this respect. In the long run, experimental approaches, designed and prototyped for each site, linking the diversity of positions and issues, tested and readjusted along the way, could enable this convergence.



Emscher Park, © Manon Loisel

And whereas the time of heritage seems much longer and consistent for its spokespersons than the action of setting up the project or implementing it in the present, which also has its own spokespersons, both must learn to work together. The concordance of times concerns here: the long period of history, the median period of the project and the immediate period of deliberation in which the future is finally played out. There are avenues for future research, analysing heritage as a resource for transitions taking place in many territories and as a common good useful for redefining the direction of our common trajectory.



# **GENERAL CONCLUSION**





Gorges of Ardèche © Laure Cormier

In 1987, the report *Our Common Future* of the United Nations Organisation, called the Brundtland report, alerted the present generations about their responsibilities towards future generations, advocating – on this occasion – the adoption of a so-called “sustainable” mode of development. However, since future generations are not able to defend their own interests, this objective remains subject to the benevolent choices of present generations, even though the latter – plagued by the inequality gap – do not agree on a large number of subjects of their time. The same difficulties are observed in the territories “hosting” heritage objects and which, when doing so, must cope with regulatory and moral obligations, the more or less reconcilable expectations of their inhabitants, and decide on the means to be mobilised to ensure their management, which is complex and multifaceted.

Indeed, the sites studied, by their outstanding nature, crystallise, often simultaneously, issues on various (economic, financial, socio-cultural, environmental...) levels. The pressures they are subjected to, through visitor flows for some or the search for attractiveness for others, intensify the problems, or the imbalances. This accentuation justifies the interest in these pressures and the search for adapted regulating solutions. Nevertheless, tangentially, the observations made in the field studies and the analyses conducted show that the realities of the sites in question are not only their own; they borrow much from those of ordinary territories, and from the situations of the areas which, while also being fragile and touristic, have nonetheless not taken the step to labelling. Attracting and developing, while maintaining the spirit of the places and preserving ecosystems, are certainly common territorial issues. The methods of easing tensions put in place around outstanding heritage sites, the experiments or innovations which are being deployed there, are likely to interest other territories, where similar tensions, even if they are not always acute or tackled in the debates or in the action, are nonetheless latent.



## The three structuring problematic dimensions

To summarise, it is apparent that among the issues identified, three of them are essential and have, by their recurrence and their intensity, a structuring character. They relate to a difficult (taking into account and subsequent) conciliation between the short term and long term of the sites' development and the actions concerning them, to the (institutional) fragmentation of these sites, to the category-based rationales in which they are often confined.

### Conciliation between the short term and long term

The projects involving the awarding of the RGSF label (OGS) for example, spring from a need for reparation (of the effects of tourism pressure), then triggering a project approach. The application for inscription leads to a phase of particular mobilisation of the partners.

Obtaining the label then requires the persistence of this impetus, with a view to sustainable management. Tensions arise between this temporality the mobilisations, sometimes contingent, as well as the – short – expiry dates of electoral mandates, or the time-horizons of just a few years which punctuate the life of ad hoc management structures (their stability is quite relative since they are influenced by the commitments of their members and subject to their reversibility, by the timeframes of external financing, etc.). Short-term logics therefore often prevail to address the difficulties, or even the impossibility of reasoning beyond. The emergence of strategic visions is then prevented.

This impermanence in itself would not be harmful if it were not in direct conflict with the long-term logics, at the foundation of the notion of heritage, which must be sustainably preserved, through appropriate management and development methods, in order to ensure its transmission to future generations.

From an operational point of view, the temporal instability is conducive to the making of investments, often the most prized, without the regular and recurrent management methods being calibrated accordingly. The financial means for the running and

engineering are often lacking (in the Somme Bay and in the Gorges of Ardèche, for example).

These difficult adjustments and temporal sequences and the absence of continuity are, to varying extents, common in local management; they form the backdrop for common or ordinary issues.

In the case of outstanding heritage sites, the issues are heightened in that the labeling or inscription on UNESCO's heritage list implies, or sometimes requires, a certain immobility and, therefore, the denial of the passage of time, which is a non-operational myth since landscapes are themselves evolving. Locally, the political and management bodies must therefore take decisions on the admissible changes, the developments to be accompanied, and the transformations to be promoted or impeded. Are we adapting to climate change and to various ecological or natural evolutions (Mining Basin, Somme Bay...)? What economic transformations do we promote for the coming years in connection with the past (Canal du Midi...)? How do we integrate the heritage and practices of the past relating to nature (Somme Bay, Ochre Massif...)? What urban enhancements are considered in order to evolve without completely altering the site (Le Havre...)? Such questions around the temporal dynamics, their intensity and influence, emerge in any territory.

### **Integration attempts faced with fragmentation**

A second level of difficulties perceived regarding outstanding heritage sites is related to the fragmentation which runs through them, and which in particular has an impact on their governance and financial management methods.

This fragmentation occurs against a backdrop of communal "crumbling", through the prism of "interlocking" government levels and superimposing decision-making bodies. This is exacerbated for outstanding heritage sites which are, by definition or by nature, multi-territorial, extra-territorial, and where action is often inter-territorial. Especially as it is not merely a matter of management: it is essential to allocate resources strategically, to arbitrate between different sectoral purposes, within power relationships which

are both complex and multiple. Horizontal and vertical logics become intermingled, driven by the State and its representatives, always present. The resulting organisation, the arrangements made, are more or less opaque depending on the places, more or less pacified. The management structures evolve within these issues, without holding an equal power when it comes to raising funds (they are largely dependent on the contributions from their members, which have the capacity to impose) and spending them (in the name of the priorities collectively defined).

The issues are barely different where there is no site; they refer then to the shared operating methods of our territorial system. They also signal inconsistencies resulting from the search for relevant scopes for local action (Offner, 2006), hesitations in the face of an attachment to a logic of territories that is sometimes outdated (Vanier, 2015). The practices identified abroad (the IBA and the contractual associations in Germany for example) show that other methods are possible.

### **Category-based logics, undermining associations**

According to the points of view of the representatives of outstanding heritage sites, the positions are frequently ambiguous, around the division between the usual categories of inhabitants on the one hand, and visitors on the other. Although they are the two sides of a same presence in the territories, they are often segmented rather than associated. There are many representations. In this respect, the strategy consists in attracting occasional presence, in extending the seasonality, but also, in controlling the flows, in channelling them towards selected places, in avoiding mass tourism and August holidaymakers... In return, the passers-by evaluate the hospitality of the local residents. The conflicts over use and their management reveal issues that arise around the sites as in other places, dimensions relating to appropriation (us/elsewhere), to territorial belonging (us/the others) and to a difficult reconciliation between identity and otherness. In the sites as in ordinary territories, access to government bodies is restricted to the residents.

A second division is related to the separations established between public and private actors. The SCIC Okhra is thus not authorised to become a management structure of the Ochre Massif, only the local authorities have this capacity. The methods of association between public and private logics are strongly delineated; they can bear few variations around the canonical form of the public service delegation (practised for facilities, reconstruction places, closed spaces, etc., that lend themselves to it). The strict division between what is the responsibility of the local or management institution, what is non-lucrative and what lies with commercial and industrial activity, is ensured, in the sites as elsewhere. It is up to the public power to decide, and up to private institutions to execute, the gap is still relatively pronounced. Are more partnership-based arrangements possible?

### Strong dependencies weighing on the emergence of new practices

Overcoming the tensions weighing on a number of sites, the search for new practices for the peaceful operation of their territory requires taking into account the – strong – inertia of these practices. In particular, the evolution trajectories will materialise based on the heritages weighing on our modes of government, the impacts of financial situations and the choices made in the past; they will be part of the extension of the normative or regulatory responses provided so far and which it is difficult to get around, at least in the short term. A number of representations also come into play, acting as barriers to the mobilisation of actors, in particular local ones, or justifying it.

### **Cumbersome rationales for action**

As a result of the logics and fragmentations mentioned previously, it appears that the site, as such, can hardly serve as a mobilisation vector. Indeed, the (beautiful) remains of French vertical neo-corporatism limit the capacity of actors to consider the area, the landscape, the site, as a common good that everyone has a stake in preserving and enhancing. As a whole, the site does not exist as such, but through specific points of view, related to the particular interests of each group of actors. This is true when the common good is designated according to a top-down logic; it is then created by decree. This is also the case when the project and its labelling result from a local initiative; the latter is backed only by a part of the forces present (in this case environmentalists, or a few charismatic personalities, elsewhere the political and technical sphere seeking development levers...). The reference to these origins is certainly present in the statements of the stakeholders, it continues to determine the positions. Regarding the difficulties of outstanding heritage sites in making up a site, one might even refer to the “tragedy of the commons” (Hardin, 1968), even if the expression has caused controversy. One might even speak of “common tragedies” since the difficulties of reconciliation of interests, of appropriation and mobilisation do not concern only outstanding heritage sites and do not stop at the limits of their perimeters. Therefore the road is long before forms of government, both new and adapted, are established, as an alternative to conventional modes of intervention.

### **The inertia of financial situations**

The field studies and the national survey regularly emphasised the difficulties in raising funds (the label is sometimes conceived in a utilitarian way to that end), in their allocation (in an alternative separating preservation and development) as in the redistribution (between differentiated uses, in favour of various spaces within the site or of various types of beneficiaries). The awarding of the label or the inscription and the subsequent requirements for its maintenance raise the stakes. Local representations converge with those driving the public debate, showing a high degree of financial constraints. Nev-

ertheless, the overall analyses show, based on various indications, that the budgetary room for manoeuvre of the local institutions involved is not exhausted. The situation is not alarming. Contrary to what is frequently stated, the expenses are high, but not everywhere and not in an excessive way. There is certainly a diversity of cases, in the image of what is true when we consider all the territories, of variable wealth and financial health. The common limitations mainly concern the inadequacy of the local taxation to the realities of the taxpayers and territories, and often the reluctance of local elected officials to use a fiscal lever, in proportion to their action plans. The diagnosis would require an extension, by including the situation of the entities (joint associations...) involved in the management alongside the local authorities and the activities carried out by the delegates to which recourse is made. This integration and these difficulties are stumbling blocks of all the local analyses. The research period and the lack of adapted information, its dispersion, and sometimes even the reluctance to communicate it, did not enable these obstacles to be removed.

The fact remains that the financial or budgetary room for manoeuvre is unequally distributed according to the sites and, hence, that the territories are not equally able to be resources for their outstanding heritage sites. The wide gap between the revenue that is available locally and the intensity of the needs is palpable in extreme cases where a few communes, often small and rural ones, clearly cannot alone or together, meet without difficulty the costs associated with the site and its perpetuation (Saint-Savin, Somme Bay, Gorges of Ardèche...).

Catching-up effects are seen here and there (the tax wealth that households represent tending to increase faster where it is less abundant). Yet the fiscal-financial situations change little over time: the budgetary latitudes ahead are largely dependent on the territorial situations and the productive-residential combinations as well as on past financial choices.

The territory dynamics determine the capacities that may be mobilised for the site, especially where the resources are modest and, often jointly, where the territorial dynamics are rather sluggish.

In other cases, the past policies relied on a strong solicitation of local budgets. A delay seems necessary, before supporting new dynamics, for example in favour of the site,

apart from building on other financing vectors, associating private actors (delegations, partnerships, etc.) which is not damaging per se. Potentially, opening up to innovative, experimental modes of action is thus made more or less imperative according to the existing situations, and whether or not the action levers, resulting in all cases from the political choices made by local decision-makers and from the mobilisation of stakeholders, are activated.

### The tangle of standards

The solutions to territorial problems, in the area of development and town planning for example, are most often provided in the form of regulatory provisions, scattered in a pile of documents, to such an extent that we may speak of a real tangle<sup>63</sup>. Imposing uniform and top-down standards induces a fixity, inconsistencies with the territorial specificities, subsequently limiting the scope for adaptation and slowing down the territorial development dynamics. For the sites labelled RGSF (or at the labelling planning stage), the classification under the Law of 1930 is mandatory; it is only one of the pieces of the structure imposed on any project, activity, etc. The abundance of regulations of all sorts is recalled by most interlocutors of the sites; for the vast majority of them, it hampers virtually any possibility of action. Many of them also admit that they confuse the various arrangements for the preservation and classification of heritage properties.

The local actors remain critical of this profusion of rules, or refer to them to justify a situation of wait-and-see and passivity. The sites then function as stocks, generating income for those who succeeded in created them and in seizing them. In the absence of mobilisation and commitment in voluntarist dynamics, existing situations persist, without the creation of new flows and appropriation by new beneficiaries (including inhabitants and visitors). One of the necessary conditions for activating the local resource is lacking.

<sup>63</sup> Expression of J.-P. Lebreton (1996), cited in Lecoq V., 2004, Contribution à l'étude juridique de la norme locale d'urbanisme, Ed. Presses Univ. Limoges, 563 p.



These standards are indispensable, in order to limit individual uses and to ensure collective (preservation...) purposes. The obstacles, or even the impossibility to act which they give rise to are in some cases instrumentalised, here by the mayors whose ambitions to build they limit, elsewhere by property owners when they contravene the generation of rents... Outstanding heritage sites, which involve more issues of all kinds, are more exposed to these tensions than the others. Whereas the weight of the arguments against standards should be put into perspective, it must be recognised that, for lack of restrictions in their use, compliance with them is expensive, or even disadvantageous, and contrary to the compatibility of functions (between economic developments, shops or recreational uses and protection of the site). The existing pile as well as the tendency to create new constraints cannot disappear. New uses will inevitably be contained, or limited, by this array of constraints. It would be paradoxical if the modalities of responses provided to regulate the current tensions in the sites and in their surroundings were also formulated at the normative level.

### **The emergence of new, innovative, experimental solutions**

Despite inertia, standstill and sluggishness, a number of provisions are emerging, in the French and foreign sites selected, as vectors of integration, acting against the difficult articulation of temporal logics, the effects of institutional fragmentation and the segmentations between the views of the categories of actors involved.

In a number of territories, trajectories and changes in the models are in progress, under various impetuses. On the side of governments, political collaborations sometimes exercise their influences, to overthrow the practices and give a new impetus (Ardèche, Nord-Pas-de-Calais...). Intercommunal or association-based cooperation practices are here or there conducive to the emergence of sharing and pooling methods, and even to integration (Le Havre). New debates lead to the reconfiguration of alliances (protection against submersion risks in the Somme Bay, threats to recognition for the Canal du Midi...), etc.

On the socio-economic front, stirrings indicate the emergence of new forces, renewed sharing methods, etc.

Concerning the study sites per se, the analyses highlight promising trajectories, such as that taking place in the Ochre Massif which combines several directions, between changes in its economic model (exploitation of the income gained from tourism via tolls, debate around the methods for revenue sharing between communes and inter-communality) and particular partnership arrangements with private actors, the SCIC Okhra having for example several missions (in terms of economics, culture, etc). Other types of trajectories, more or less advanced and diversified, coexist, perceptible in the logics which run through the Canal du Midi and its banks, or the Gorges of Ardèche, with an integration which is at present more or less soft (Somme Bay), more or less irregular and reversible (Marais Poitevin), more or less intense and advanced (Mining Basin).

The potential for innovation, break or dissemination of the various initiatives revealed by the areas cannot be assessed and ranked. It is mentioned as weak signs of bifurcations, intervening owing to the local configurations.

### **Capitalising on the existing**

When the site's configuration (open/closed, unique/multiple, and so on) is favourable, in a number of sites, tolls are established, either as entry fees to the reconstruction places, or as parking payments when free admission has prevailed until then. Those entry fees and payments, introducing market procedures and a regulation through prices, increase the (operating) budgets of the management entities when balances are difficult to maintain. The scope of these funds, nevertheless, has no vocation to become primary. The merits of tolls are not limited to their budgetary aspects. Their introduction and setting, their periodic revisions, are opportunities to examine the place of the visitor and that of the residents, public categories to welcome and to focus on as well as the uses to foster (the place of soft mobilities) or on the contrary to discourage. They also provide the opportunity, among the parties involved, to reflect on the consistency of the provisions and on the division of tasks (between local authorities, managers, transport operators, representatives of inhabitants and users, accommodation operators, and so on). In the Somme Bay and in the Gorges of Ardèche, initiatives in that

respect gradually materialise, by building from inherited situations.

The label was awarded based on the specificities of the territory, and by capitalising on its past. The enhancements are established by maintaining continuities with earlier forms of development, their uses and productive ends (Italian Piedmont, La Chaux-De-Fonds in Switzerland). The viticultural or watchmaking products are the hallmark of the places, involving local economic actors in the future of the territory and heritage. The emblems are not always so distinctive. Nevertheless, local products, local brands borrowing the site's image are offered in different forms. They contribute to the activation of the local resources, to the enhancement of the territory, and to the anchorage in a system of values (both material and immaterial). The commercial successes and the acceptance of the managers are fairly uneven faced with these practices which are now practically generalised.

As much as local products, knowledge and know-how are very frequently mobilised to maintain both the transitions and the continuities. The hunters become guides and accompany visitors (Somme Bay...); the farmers maintain the environment against payment for the services they render (payments for environmental services, PES), etc.

Another form of reconciliation of the interests involved is emerging within the framework of associations around the financing of projects, initiatives, etc., through sponsorship and crowdfunding. These multiple practices are increasingly being developed. The aim is, for example, to raise funds for the replanting on the banks of the Canal du Midi and thereby to recreate the reference landscape, which is common to the actors and for which everyone may wish to contribute. Local examples are not lacking. The counterpart, for the funders, individuals or companies, is a recognition in terms of image or notoriety. The assessment of these forms of association is yet to be carried out; they are debatable and controversial. In any event, their extent cannot be limited. The private financing choices, their availability and their contingency would otherwise guide collective action. One of the benefits of alternative methods (compared with the usual forms of increasing the public budgets) lies in the opportunity for opening discussions between stakeholders. These debates enable the question "who is financing what and how?", which is too often taken for granted and limited to specialised arenas, to be put

back on the agenda. In parallel, this leads one to reconsider the place of generalised solidarity contribution (represented by tax). What is the sense of a taxation based on visitors (such as the tourist tax)? Is discussion on the issues and objectives to be achieved not a prerequisite for the choice of instruments and their calibration? In that respect, the multiplication of specific fiscal tools is not an end in itself. Generally, the performance of such mechanisms is low, their scope being limited by nature (they cannot in any way go against the principles of equal treatment of taxpayers). Given the complexity and instability of the French fiscal structure, it is inconceivable to overburden it.

### **Conciliating the stakeholders and temporalities**

When the need arises to determine a mode of government for what falls within an outstanding site or, more broadly, within the exercise of jurisdiction, the solutions found differ little or rarely from the formatted models that everyone has become accustomed to. The Joint Association is an arrangement method capable of associating various public bodies (possibly of different ranks) around clearly restricted missions assigned to it by its members. The intercommunality (with its own tax system) is another, whose forms are now established and recognised, which has the virtue of existing and working, based on a balanced transfer of resources and costs between its members. These provisions have strengths and weaknesses which do not make them in any way universal.

The practices identified abroad invite us in particular to reconsider our French models. In particular, the flexible and integrative formula practised in the Anana Valley has a number of points of interest. The visitors participate in the rehabilitation of the site and thus contribute, alongside the vital forces of the territory, to its enhancement. This enables the sectoral logics to be combined. The enrolment and the participation are progressive, increasing with the project's progress, in conjunction with a political backing. The various timeframes are organised in a form of continuity. The inscription on UNESCO's World Heritage list should be one of the milestones.

The IBA formula and its extensions in the Emscher Valley is another specific case. The institutional organisation was formalised at the outset of the initiative. The contents of the projects and missions, nevertheless, change over time, adapting to the needs of the site's reconversion, to the changes in practices, and to the diversity of uses.

To a greater or lesser extent, the various study areas borrow from one of these two cases. As in other cases identified abroad in the course of the research, we observe here and there original methods of diversifying of uses (organising the compatibilities and continuities), the diversification of financing possibilities (removing the constraints and involving a broader range of stakeholders), the mobilisation of the civil society (in the rehabilitation of the sites and in the development of projects concerning them), including the setting up of original governance tools.

In the face of the diversity of configurations, sites and territorial projects, no model can, or seem to, or should, be imposed a priori. Can we then start from a postulate of trust, based on the principle that the territories and their outstanding heritage sites have the capacity to find arrangements that are appropriate for them? Would this be true however for all the territorial systems?

## Open experimentation environments

Practised in various domains, and especially in reconstruction spaces and cultural sites, using digital tools, Living labs suggest new arrangements for sharing the state of affairs of territories, for formulating scenarios for futures envisaged from new original points of view stemming from various parties. They appear to be fully adapted to the issues of outstanding heritage sites and tourist places.

An experiment along these lines was initiated in Toulouse, as part of the research project. The creative workshops have fostered the emergence of renewed and shared points of views on the uses of the Canal du Midi and its governance. The initiative underscores in particular that the heritage can be made permeable to different uses and open to various groups, within an extended territory. The initiative would lead to other ones, reinforcing these first contributions.

The Living lab tool, or the scheme, jointly with other debate arenas, could therefore be used to examine our modes of operation, to shift our points of view and to revisit the integration methods, cobbled up here or there, around temporal logics, institutional fragmentations and category-based dissociations which most often surround the evolution of the sites in particular, and of the territories in general.

It appears, with some insistence and recurrence, that outstanding heritage sites are no exception to the multi-actor, multi-scalar, multi-temporal logics which run through the territories, involving changes in the modes of planning, management, decision-making and, finally, of local public action. Overall however, the issues remain unchanged, they are those of the (sustainable, integrated...) development of the territories, federating the interests. Thus, the innovative or renewed methods mentioned as well as the provisions contributing to the mobilisation of the stakeholders, could converge towards the emergence, the formalisation and then the implementation of territory projects, including outstanding heritage sites which, when they exist, are an integral part of them. The landscape, in that it is an invariant, both natural and anthropogenic, because it is common by appealing to the senses, could constitute a vector around which these projects

could be built. To seal alliances, which are certainly evolving, and to guarantee a coherence of means and temporal horizons, one might go so far as to couple these projects with Territory Charters<sup>64</sup>. Between rules and contracts, more flexible than the first, less formalised than the second, these charters, both contextualised and territorialised, would be the operational translation of the projects for activating territorial resources, uniting sites and territories. But many questions remain. What are the potentialities for more flexible formats of territorial alliances, what are the prospects for new action schemes, whether in outstanding heritage sites or in ordinary territories?

In order to ensure the continuity of the outstanding character, the aim is to renew the approaches, without threatening often fragile balances, resulting from their long history. The entry to be given priority is therefore the recognition of territorial negotiation arenas to ensure through their operation the coexistence of actors, logics, scales and times, the co-decision of the commitments, priorities, investments and strategies as well as the co-building of actions, policies, territories, and of the future. Outstanding heritage sites, as heritage objects which are noticed because of their outstandingness, offer present but also future services that one could describe and recognise as socio-systemic. This work, which focused less on the measurement of these aspects than on their synergy, certainly deserves to be extended. The non-use values which, for many actors, refer to the treatment of the future and are relegated for this reason, should be included in the building of the present. These outstanding heritage sites express, more than others, the fact that if the future inherits from the present, the ongoing action finds its sense only in the future.

<sup>64</sup> Possibly adapted and updated under the framework established by the Voynet Law (1999), these charters may be locally defined as proposing “guidelines which are all pieces of an overall and coherent mosaic: the territory project” (source: [http://www.payssaintongeromane.fr/article.php3?id\\_article=105](http://www.payssaintongeromane.fr/article.php3?id_article=105))

A Charter of this type was for example signed by the managers of the Sainte-Victoire site and their partners. The objective is to “imagine a future which, at once, preserves the living conditions of the inhabitants and the qualities, the values and the spirit of the place of Sainte-Victoire, Grand Site de France, enriches the overall experience of its visitors, provides a distinctive asset in the tourism positioning, and generates economic wealth and employment for the Aix area as a whole.” (source: <http://www.grandsitedefrance.com/actualites/recelement/506-une-charte-de-tourisme-durable-pour-le-grand-site-de-france-sainte-victoire.html>)







Outstanding heritage sites: a resource for territories



# List of illustrations

	pages
Figure 1: Diagram of the methodological approach of the study	16
Map 1: The Grands Sites de France	30
Map 2: The UNESCO sites	31
Figure 2: Typology, from private goods to (pure) public goods	38
Map 3: Outstanding heritage sites in their territorial context, scales of analysis	43
Figure 3: Summary of the socio-economic typologies	47
Map 4: Socio-economic typology of the sites in their territorial context	49
Table 1: The composition and profiles of the similarity groups of intercommunal groupings containing outstanding heritage sites	52
Map 5: Distribution of the similarity groups, fiscal-financial typology, intercommunal groupings of the sites	54
Figure 4: Methodology for the environmental typology	59
Table 2: Synthesis of the environmental typology for the study sites selected	60
Figure 5: Typological synthesis of French study areas	62
Figure 6: Interaction between the two spheres of the territorial culture	67
Figure 7: Four typical relations between the two spheres of territorial culture	69
Table 3: Territorial dynamics of outstanding sites and their territories	82
Table 4: Distribution of private salaried employment in 2014 by sphere, in %	83
Table 5: Variation of private salaried employment between 2007 and 2014 by sphere, in %	83
Table 6: Population, employment, incomes and tourism carrying capacity of areas for which the site is a resource among others	85

Table 7: Population, employment, incomes and tourism carrying capacity of areas for which the site remains a resource to be activated	93
Table 8: Population, employment, incomes and tourism carrying capacity of areas for which the site is a development lever	95
Table 9: Tax wealth and trend (2002 to 2015), various categories of communes	102
Table 10: Unit amounts of taxes paid by economic activities, intercommunal groupings, 2015, in €/job	110
Table 11: Communal expenses, communes of the sites and communes outside the sites, 2002 and 2015, various indicators	113
Table 12: Debt relief capacity, communes of the sites and off-site communes, 2002 and 2015, in years	117
Table 13: Similarity classes, ascending hierarchical classification (AHC), communes grouped by sites, 2002-2008-2015	121
Figure 8: Profile class 1 (Domaine du Rayol and Clarée and Étroite Valleys)	122
Figure 9: Profile class 3 (rather like the Gorges of Ardèche)	123
Figure 10: Profile class 4 (rather like the Sites/Caves of the Vézère Valley)	124
Figure 11: Profile class 6 (rather like Bordeaux)	125
Figure 12: Profile class 7 (rather like Bourges Cathedral)	126
Table 14: Amounts collected on account of the tourist tax, communes and intercommunalities (exceptional heritage sites and others), Mainland France, 2015, in million € and in % of the total	176
Table 15: Unit tariffs, tourist tax, selected sites, 2015	177
Table 16: Tourist tax revenues, outstanding heritage sites and others, 2015, various indicators	178
Table 17: Regional products and know-how enhanced within the outstanding heritage sites studied	203

Figure 13: Regulatory systems observed in the outstanding heritage sites studied	208
Figure 14: Was the object of your recognition accompanied by an impact on the environment that you assess?	222
Figure 15: What are the motivations which lead visitors to go to the site?	223
Table 18: Operations and actors	241
Table 19: The situations of the study areas, drivers and obstacles	256

Outstanding heritage sites: a resource for territories



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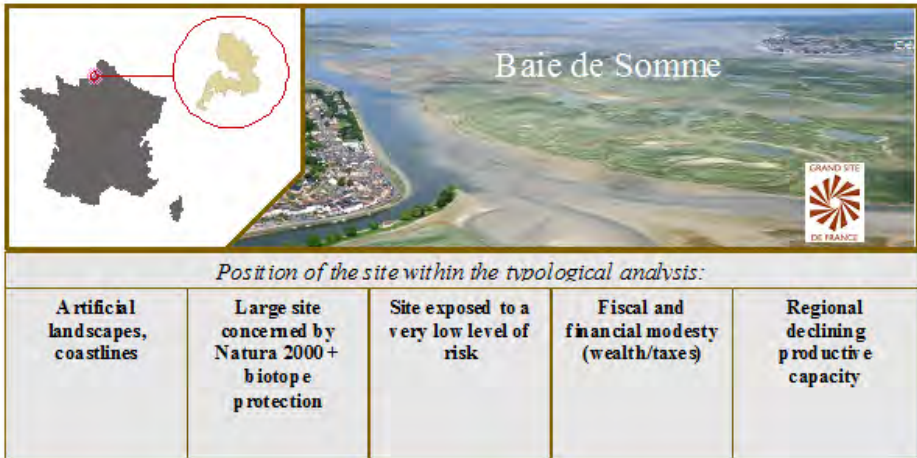
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Outstanding heritage sites: a resource for territories



# Presentation of the research areas

Outstanding heritage sites: a resource for territories



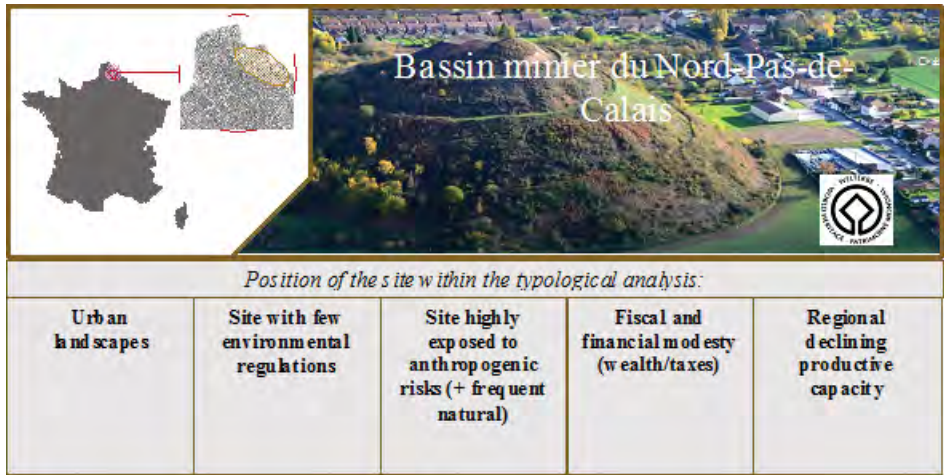
### Presentation of the site

The Grand Site of the Somme Bay is composite in nature, with an outstanding landscape of dunes, grasslands, marshes, bocages, farmland, pastures and maritime areas. A large part of the latter is protected by the Law of 1930 (on natural monuments and sites). In 1974, a joint association (French: syndicat mixte) was created to develop and preserve the Somme Bay, the Picardy coast and its hinterland. The Grand Site Operation was launched in 2002 to rehabilitate the sensitive natural areas, combat the erosion of fragile environments, work towards the reopening of the large landscapes of the Bay and find solutions in terms of flow control. The Grand Site label was awarded in 2011 and the Joint Association was, among other missions, entrusted with its management. Situated in a context where territorial development is problematic, the Grand Site is an opportunity, met with varied reactions from the local actors. It condenses a multitude of issues and challenges combining the management of natural environments, the preservation of biodiversity, adaptation to flood risks and going as far as the reconciliation between traditional activities

and opening to tourism, in a perspective which aspires to be sustainable.

### Main interest of the site for the research

The Somme Bay illustrates an original scenario, where within a productive region in decline, an attractive tourist area has emerged, largely ignoring the industrial and touristic past, as nature tourism is gradually replacing seaside tourism. As such, particular attention is paid to the historical construction of the heritage site and its management methods. Furthermore, the Somme Bay has now reached a crossroads in its development trajectory, since the significant social and political issues now include the progressive integration of the coastal flooding threat. In sum, a major issue emerges around the reconciliation of expectations in terms of (tourism, educational, market...) value creation and injunctions relating to various scales (risks/nature protection/sustainable development...).



### Presentation of the site

The Nord-Pas-de-Calais Mining Basin corresponds to the French part of the northwest European coal seam. On a broad open plain, it extends some 120km, through the two departments of Nord and Pas-de-Calais. For nearly two centuries, it has been the – almost exclusive – home of a coal industry. In parallel to the closure process for the last mining sites in 1990, a few actors of the territory initiated a heritage process. It was first based on the identification of an exceptional biodiversity on the slag heaps. It continued with the organisation of a few emblematic events based on a collective mobilisation around the heritages. The pursuit of the process led in 2012 to the UNESCO inscription of the Mining Basin under the category of “living cultural heritage”. The heritage includes more than 343 separate components, within the framework of a complex management. It is a remarkable “evolving living cultural landscape” in terms of its continuity and homogeneity. It is part of an economic crisis context, which raises questions on heritage mobilisation in a transition project. In parallel,

Lens was equipped with a national cultural infrastructure, the Louvre Lens, which generates strong territorial attractiveness.

### Main interest of the site for the research

The cross-challenges in terms of heritage management and development of the Mining Basin are of a rare magnitude, due to the fact that the territory is experiencing a structural crisis, weakening its economic and social fabric, and that the industrial landscape which has earned it its very recent inclusion on the UNESCO World Heritage list remains largely to be enhanced. A remarkably complex governance is added to this, superimposing multiple management structures which make management all the more difficult. Through this study area, the aim is also to represent the case of industrial territories on the one hand, and territories actively seeking change on the other hand. In short, the aim here is to monitor the evolution of the uses and values attributed to the industrial landscape in a crisis context.

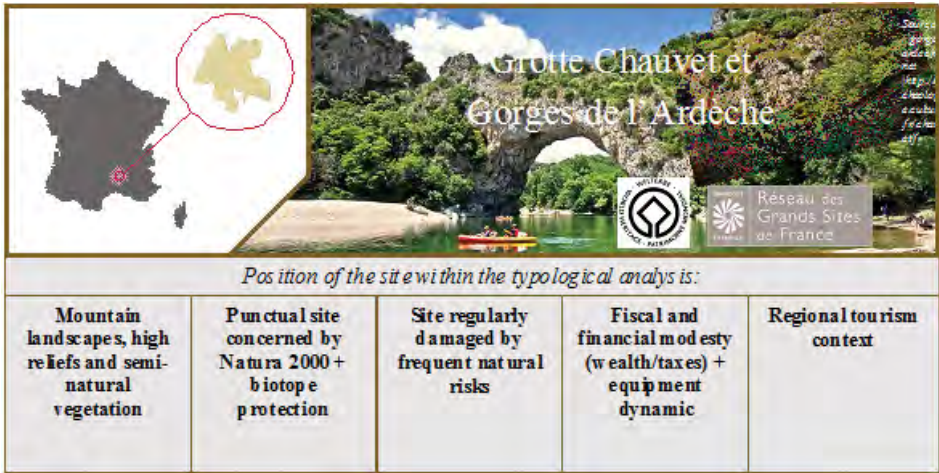


### Presentation of the site

The construction of the 350 years old Canal du Midi was initiated under Louis XIV, and placed under the supervision of Pierre-Paul Riquet, in order to establish a secure navigable waterway linking the Atlantic and the Mediterranean. It extends over 241 kilometres, from the port of Toulouse (Haute-Garonne) to the Thau Lagoon in Marseillan (Hérault). In the 19th century, the rise in power of local railway companies, followed by their acquiring control over the operation of the Canal, precipitated the fall in waterway freight traffic. Despite a recovery plan initiated by the State at the end of the 19th century, and a rebound after the Second World War, the freight traffic decreased strongly before ceasing in the 1970s. Coming under the public fluvial domain, the Canal du Midi belongs to the State and since 1991 it has been managed by a delegatee public establishment, Voies Navigables de France. Since the 1980s, the Canal du Midi has become a well-established hot spot for waterway tourism and was included in the UNESCO World Heritage list in 1996.

### Main interest of the site for the research

The Canal du Midi is a unique heritage object in terms of its shape and its extent. This area is a representative case of a linear heritage object which transcends the conventional territorial bases and questions the workings of its governance. Subject to few environmental regulations, it is a place open to various uses, but where the question of the local appropriation and attachment it gives rise to is raised. Having been faced with a disease for several years which attacks the tree belt, the site is confronted with a new problem in its history of safeguarding and restoring the landscape. The means available for the heritage management of the Canal, and more broadly to mobilise driving forces around this mission, seem more difficult to implement than elsewhere. This area therefore gives us the opportunity to undertake an in-depth discussion with local actors in a situation of *status quo* and in particular, to rethink the outlines of the heritage object and its evolution.



### Presentation of the site

A major tourism destination of the Gorges of Ardèche for a century, the Pont d'Arc and its Combe draw 1.5 million persons each year. The site is contemplated by passing motorists, bathers or canoeists, and is subject to significant commercial uses (boat rental, catering, accommodation, etc.). Committed to multiple protection measures, since the beginning of the 1990s it has led to requalification attempts through a Grand Site Operation. In 1994, the discovery within the Combe of the Cave known as "Grotte Chauvet", which contains the earliest-known cave paintings, added a responsibility for the territory. State-owned, reconstructed by the Region and the Department and managed by a private delegatee, the Cave was classified as a World Heritage site by UNESCO in 2014. From 2008 to 2015, it concentrated local energies and hopes. It had 600,000 visitors in the first year, while the territory, overall, has not yet undertaken its qualitative and cultural shift.

### Main interest of the site for the research

This territory has the particularity of containing two outstanding sites located one inside the other. On the one hand, the Combe d'Arc is committed to an Operation Grand Site in order to take action on the significant tourist numbers and address the past lack of management. On the other hand, the Grotte Chauvet is listed as a UNESCO World Heritage site, and gave rise to the creation of a facsimile reconstruction of the cave (the Pont d'Arc Cavern). This nature territory, driven by a mass tourism, is therefore offered a new cultural opportunity. The enhancement and the local anchorage of the benefits of the Grotte Chauvet remain, however, undetermined. The local actors are therefore faced with unexpected trade-offs in the territorial development and management strategies that should be adopted. The reconciliation of the roles and scopes of intervention of those concerned is a subject of interest and, especially, the co-existence of two distinct heritage objects questions their possible synergies and interactions with the territory.





### Presentation of the site

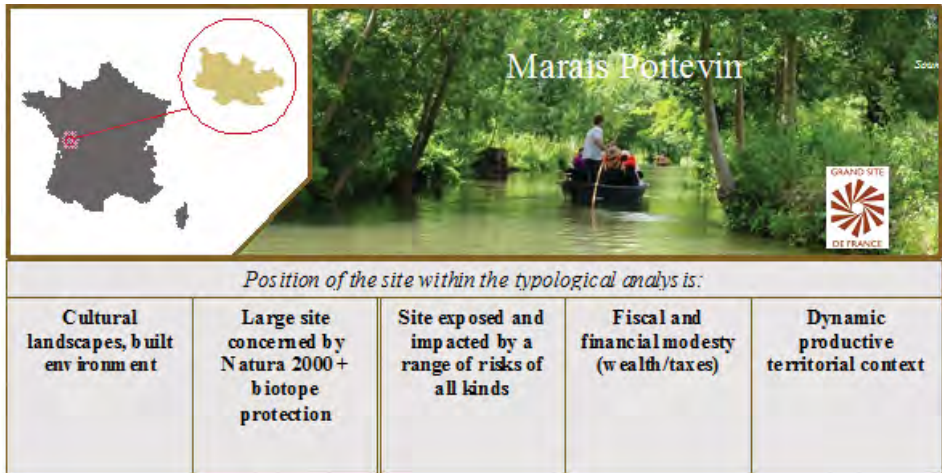
In 1944, the flat part of the city centre of Le Havre, situated near the port, was destroyed: 12,500 buildings were totally destroyed, 4,500 buildings were damaged and 100,000 people were left homeless. A compromise was found between the State and the City, so that the architect Félix Brunau would be entrusted with the reconstruction project of the Saint-François district, and Auguste Perret with the plan concerning the whole city centre. Auguste Perret combined classic urban planning with the principles of an original open island experiment, the use of reinforced concrete, as well as the use in his architecture of a “post-beam-slab” type building system with the inclusion of structural elements in the façades. The architect attempted a synthesis here between an urban planning tradition going back to the baroque period and the commitment to architectural innovation. The reconstruction of Le Havre appears as a particularly successful expression of “modern classicism”. However, this mineral and monumental architecture, built on the ruins of the old city, also marks

the disappearance of a landscape valued by impressionists. Therefore, it was not without surprise for the general public, that the rebuilt city of Le Havre was finally included in the World Heritage of Humanity in 2005.

### Main interest of the site for the research

The study area of Le Havre provides the case of an urban heritage site and of a facilitated heritage management, since it is provided with sufficient means and municipal backing. It is also a densely populated site where there are human activity management constraints. The city of Le Havre is also remarkable in that its heritage process was accompanied by a change of image and was part of an urban project approach from the outset. Therefore, particular attention should be paid, on the one hand to the mechanism through which the heritage value of the rebuilt city was asserted and, on the other hand, to the effects – beneficial or not – of the heritage process on the further development of the city.





### Presentation of the site

The Marais Poitevin was historically built by the action of man in the Marsh, which gradually transformed the former Gulf of Pictons into a network of canals and fertile lands. The contemporary landscape of the wet Marsh – which has earned the Grand Site de France label – is more specifically characterised by the developments carried out during the 19th century and – unlike the dried Marsh – remains an ecosystem influenced by the rhythm of the changing water levels. The ecological and landscape qualities of the wet Marsh, inherited from this new “agro-ecosystem”, have now become the attraction and the identity of this territory, demonstrating in return a shared concern for preserving its heritage value. Yet this commitment to the landscape preservation of the wet Marsh must cope with ongoing spatial transformations on the scale of the Marais Poitevin as a whole (agricultural land consolidation, urbanisation, etc.). Whereas the maintenance of an economically viable agricultural activity seems necessary for the sustainable maintenance of the landscape, the Marsh development tradition encountered and

is still experiencing today difficulties in persisting in forms that are compatible with the preservation of the landscape heritage.

### Main interest of the site for the research

The Grand Site Marais Poitevin illustrates, in the case of a territory subject to residential dynamics, the management problems which may arise when the heritage process entails constraints on economic development dynamics which are otherwise considered legitimate. A situation reinforced by a surrounding dynamic productive territorial context. Straddling two regions and three departments, it is a complex management site, marked by active and repeated support from the State, and whose present and future management model should be examined. Marked by the loss of the PNR status in the 1990s, followed by its regaining in 2014, the Marais Poitevin is also and above all a favourable area for understanding the tensions that are detrimental to the management effort and the means of overcoming them.



*Position of the site within the typological analysis:*

<b>Significant relief landscape, diverse landscape</b>	<b>Site concerned by a Regional Natural Park + Natura 2000</b>	<b>Site regularly damaged by frequent natural risks</b>	<b>Fiscal and financial modesty (wealth/taxes) + equipment dynamic</b>	<b>Territorial tourism context</b>
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### Presentation of the site

Ochre was intensively exploited for a century, from the end of the 19th century to the end of the 20th century. The massif is a remarkable and outstanding landscape, called the “Provençal Colorado”, but it is fragile and vulnerable due to tourism pressure problems. Indeed, more than 450,000 visitors come to the area annually. The management of the sites remains essentially communal, or even private for two of them. In parallel, the heritage process was first and foremost undertaken by the Regional Nature Park which initiated the study of a Grand Site Operation in 2012. After several years of discussion between the communes and the Park, the procedure has just been resumed by the community of communes. It has brought to the fore an actor of the social and solidary economy, the SCIC Okhra, which federates public and private actors, and claims a role in the site’s management.

### Main interest of the site for the research

The Ochre Massif first offers the case of a site that is attractive to tourists and is itself part of a tourist region. Then, the

arrival of the SCIC Okhra as a new actor in social innovation, introduces an original case of mobilisation and heritage enhancement. The emergence of this actor questions the potential that the industrial and natural heritage offers, in terms of uses, identity, governance and relationships between nature and culture. The industrial heritage represents a particularly interesting object since the historical, economical and use value was not initially accompanied by an identification value. It is therefore enlightening to understand the modalities of both its recognition and its inscription within a territorial frame of reference. Since it is a simple heritage object of a tourist region, it is also useful to consider the repercussions, both positive and negative, of the regional tourism dynamics, and the means implemented to deal with them.

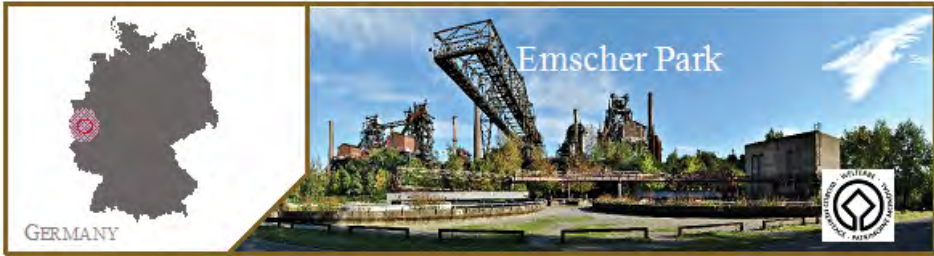


### Presentation of the site

The cities of La Chaux-de-Fonds and Le Locle, built to meet the requirements of the watchmaking industry, recall in their urban planning the precision and regularity of a watch: from the buildings' architecture to the pragmatism of the inhabitants, everything is devoted to watchmaking. This urban complex shows an exceptional coherence. La Chaux-de-Fonds and Le Locle are perfect examples of the ordered city of the industrial era... The typology of these cities can be distinguished from the large American checkerboard centres in that it bears witness to an urbanisation adapted to a unique industry. Le Locle and La Chaux-de-Fonds are the symbiosis built between the watchmaking industry and urban planning and between technology and architecture. The application of La Chaux-de-Fonds and Le Locle for inclusion in the World Heritage of Humanity was made possible by an intense and fruitful collaboration between the two cities, the canton of Neuchâtel and the Confederation, assisted by many national and international experts. Convinced of their wealth, La Chaux-de-Fonds and Le Locle decided to preserve their urban heritage, with active support from their inhabitants.

### Main interest of the site for the research

The two Swiss towns share common attributes with the Nord-Pas-de-Calais Mining Basin, by the territorial influence of their respective industrial history, and with the rebuilt city of Le Havre, by the importance of the urban layouts as a material manifestation of the heritage. However, in the Swiss case, the relationships between the territory and the heritage seem to be mutually beneficial, as the future of the one makes the future of the other. The watchmaking town planning promotes itself as the showcase – to be preserved – of a tradition and an industrial know-how that the territory continues to enhance today. As a result, tangible links are formed between local public and private actors who share a common cause through the watchmaking heritage. On the one hand, the artisanal and industrial enterprises tend to open their doors to the general public, and on the other hand, the public actors in charge of managing the heritage tend to recognise and to solicit their private partners.



### Presentation of the site

The industrial growth of the Ruhr and the towns of the Emscher valley has led to the formation of a large-scale industrial complex in Europe. As the coal deposits of the Ruhr valley have run dry, the industry moved towards the valleys of the Emscher and Lippe in order to operate deeper mines. During the second half of the 20th century, imported coal competed heavily with the Emscher mines and industrial employment then declined sharply. These lands which were once prized for their deposits, and then reduced to contaminated soil, then lastingly became brownfields. The Emscher valley was however the subject – from 1989 to 1999 – of an ambitious architectural and urban operation aimed at innovating and addressing the complex issues involved in such a territory. The “Internationale Bauausstellung”, literally “international building exhibition”, – through a planning company and on a partnership basis – encouraged and supported the implementation of about a hundred projects over nearly 800km<sup>2</sup> in the Ruhr. The Ruhr regional association (Regionalverband Ruhr) has since succeeded the IBA Emscher and pursues the intervention in what is designated as the “Emscher Land-

scape Park”. Now attracting more than a million visitors per year, and inscribed on UNESCO’s World Heritage list since 1999 through the Zollverein industrial complex in Essen, the park lands now follow a post-industrial trajectory.

### Main interest of the site for the research

The Emscher valley’s deindustrialisation process is reminiscent of that of the Nord-Pas-de-Calais Mining Basin, with the same problem of reconversion of contaminated sites. The German heritage site, however, is at a more advanced stage than the French site. In this sense it is interesting to identify the common issues and challenges, and especially to observe with what means the Emscher valley was able to address them through an original heritage process approach. In this instance, the management of the industrial heritage was set up as an imperative and as support for a territory project over a 10-year timeframe. Understanding the ins and outs of these dynamics is decisive to place them in perspective with the French cases.





### Presentation of the site

The wine-growing region of Langhe, Roero and Monferrato is located about sixty kilometres south of Turin and its hills are inhabited by slightly more than 300,000 people. The local economy is mainly based on quality wine production (protected by a system of protected designation of origin) involving an industrial sector of small and medium-sized enterprises and tourist accommodation. With the support of an association which groups together the Piedmont Region and the Provinces of Alessandria, Asti and Cuneo, the vineyard landscape of Piedmont of Langhe-Roero and Monferrato was finally inscribed in 2014 on the World Heritage of Humanity. Stemming from over 2000 years of wine-growing history, this evolving cultural landscape is a material testimony to rare and millennia-old traditions and know-how. This landscape is in particular characterised by hillsides developed in compliance with the girapoggio system, in densely populated areas, ensuring a full landscape integration of the production chain, through networks of farms, villages, industrial and commercial spaces, and so on, spread out as far as the valley bottoms.

### Main interest of the site for the research

The vineyard landscapes of South Piedmont provide an obvious parallel with the French UNESCO site of the jurisdiction of Saint-Émilion, but they also share more broadly – with other French sites – a positioning in favour of gastronomic tourism. The site's appeal also lies in the complementary and synergistic role brought by the tourism economy to the traditional industry and local agriculture. The site's heritage process did not break with the preexisting development trajectory, but followed on from it. Furthermore, the heritage designation of the site and the subsequent preservation effort is part of long-standing dynamics of mobilisation among local actors: large companies, winemakers organised in AOC (appellation d'origine contrôlée - protected designation of origin), tourism professionals, heritage managers, and so on. This extended mobilisation of local actors gave rise to alternative funding mechanisms which it is useful to consider.



### Presentation of the site

Situated at the crossroads of natural, proto-industrial and cultural experiments, the Valle Salado de Añana is one of the rare inland salt works still active today, although it experienced serious complications in the 20th century. The site covers 13 hectares, located in a rural area of the Alava province, 30km from Vitoria-Gasteiz, the political capital of the Basque Country. The salt works (salinas) of Añana, with a history of over 6500 years, narrowly escaped abandonment in the post-war period, in response to falling salt prices and to the gradual depopulation of the territory. At the end of the 1990s, the disappearance of the salt workers became an alarming prospect, and in reaction, the Sociedad de salineros Gatzagak S.A (society of salt makers) was set up with the aim of reparcelling the salt works. A tripartite agreement was then established with the town council of Añana and the floral service of the province of Alava, providing for a transfer of ownership of the salt works, and the implementation of a master plan for the management of the cultural landscape. The restoration and the productive revival of the salt works were accompanied by an opening to the public and a large promotion of the quality of Añana salt. Despite an unsuccessful application for UNESCO classification in 2014, the salt

from Añana was awarded a prize by the NGO Slow Food, guarantor of the quality of food products, and the heritage management of the site was recognised by the citizen prize “Europa Nostra” in 2015.

### Main interest of the site for the research

The Añana valley, a fragile cultural landscape, since it is maintained by traditional human activity running counter to the requirements of the industrial society, demonstrates – through salt production – the possibility of perpetuating this type of activity. This revival of salt production is expressed through changes, both in the salt work management methods, and in terms of the economic model. First, a regime of centralisation and transfer of ownership rights succeeded that of the fragmentation and individual management of the plots. Then, the emergent economic model is now that of a salt production that is no longer isolated in its sector, but open to intersectoral synergies. The opening of the productive sites to visitors or the development of gastronomic tourism, are the expression of this diversification of uses and activities within the valley. Many outstanding heritage sites face the weakening or the decline of the traditional activity which maintained the heritage property so far, this is why the Añana valley appears as a first choice study case.



### Presentation of the site

The Megalithic Temples of Malta (Ġgantija, Ғaғar Qim, Mnajdra, Skorba, Ta' Ғaғrat and Tarxien) are prehistoric monumental buildings constructed during the 4th millennium BC and the 3rd millennium BC. They rank amongst the earliest free-standing stone buildings in the world and are remarkable for their diversity of form and decoration. Each complex is a unique architectural masterpiece and a witness to an exceptional prehistoric culture renowned for its remarkable architectural, artistic and technological achievements. Each monument is different in plan, articulation and construction technique. They are usually approached from an elliptical forecourt in front of a concave façade.

The Megalithic Temples of Malta are remarkable not only because of their originality, complexity and striking massive proportions, but also because of the considerable technical skill required in their construction.

All six components of the property are in a reasonably good state of conservation, although the Tarxien complex is less well preserved than the others. They have a high level of authenticity. They consist of well-preserved remains of megalithic temples, with evidence of different phases of construction in Antiquity.

### Main interest of the site for the research

All six temples are subject to the main legal instrument for the protection of cultural heritage resources in Malta, the Cultural Heritage Act (2002). This Act provides for and regulates national bodies for the protection and management of cultural heritage resources.

Building development and land use are regulated by the Environment and Development Planning Act (2010) and subsequent amendments, which provides for and regulates the Malta Environment and Planning Authority. Since land use is a highly contested issue in the Maltese islands, the safeguarding of the Megalithic Temples and their buffer zone through the careful regulation of building development is therefore an issue of fundamental concern.

Protective shelters are presently the most prudent and effective means available to slow down the deterioration processes that are eroding the monuments. Lightweight, removable protective covers have been implemented as an interim strategy to prolong the life of these buildings, while research continues to identify alternative long-term preservation strategies.



# Presentation of the authors



**Magali Talandier** is a Professor at the Grenoble Alpes University, Leader of the research team “Cities and Territories” and Deputy Director of the Pacte laboratory. An economist by training, Doctor in Urban and Regional Planning, she is a specialist in residential economy and works at a broader level on the analysis of territorial economic development processes. She was the scientific manager of the research programme which gave rise to this publication.

**Françoise Navarre** is a Lecturer at the Paris School of Urban Planning (Ecole d’Urbanisme de Paris, EUP) and a member of the Lab’Urba laboratory (Paris Est University). Her teachings and her work focus on the land planning economy and local public finances (in their territorial and institutional variations, in their interactions with local public action). Françoise Navarre coordinated, with Magali Talandier, the scientific project which gave rise to this publication.

**Raphaël Besson** is an expert in urban socio-economics and a Doctor of Territorial Sciences. In 2013, he founded “Villes Innovations”, a design consultancy based in Madrid and Grenoble, specialising in urban innovation policies, and the socio-economic, cultural and digital policies of territories. Affiliated with the PACTE laboratory, his research focuses on the spaces of knowledge and innovation, the changes in the economy and the city production, regenerative ecosystems and territorial transitions. While working on his thesis he forged the notion of Cognitive Urban Systems, through the study of major creative urban projects based in Buenos Aires, Barcelona and Grenoble.

**Laure Cormier** is a Geographer/Landscaper Lecturer at the University of Tours, Department of Geography, at the social sciences laboratory UMR CITERES. She works on environmental public policies, governance systems and landscape dynamics in land use planning. She is involved in various research projects dealing with essentially French urban and rural territories, with Portuguese and Brazilian insights.

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**Manon Loisel** is a Political Scientist and Urban Planner, consultant for the Acadie cooperative, since 2013. She participates in the development of territorial strategies, in research and prospective missions applied to the territories, and in planning. She is Associate Lecturer at the CNAM and teaches at Sciences Po (Master of Regional and Urban Strategy).

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Outstanding heritage sites condense issues pertaining to economic development, financial management, governance, appropriation and preservation, affecting the territories which they are part of. These tensions, given free rein, would undermine the purpose served by the sites as well as their sustainability. In this context and after the analysis stage, the publication lays down the necessary conditions for these remarkable sites to constitute resources for the territories hosting them, and for these territories to make best use of their capacity for action in favour of heritage properties.

By combining several disciplinary perspectives and empirical analyses, conducted both at the national level and as close as possible to the eleven areas chosen in France and abroad, the authors look at the problems of territories hosting outstanding heritage sites (in particular those featuring on the UNESCO world heritage list or those recognised under the Grands Sites de France Network) with a renewed perspective. Finally, these conditions of outstandingness also shed light on the future of all the so-called ordinary territories.



Plan Urbanisme Construction Architecture, PUCA, is an interministerial research and experimentation programme run under the aegis of the Ministries of Territorial Cohesion and Relations with Local Authorities, and of Ecology and Inclusive Transition, Culture and Research. PUCA develops programmes of incentive research, action-research and experimentation. It supports innovation and scientific and technical dissemination in the fields of spatial planning, housing, construction, and architectural and urban design.