

MANAGING LOCAL CULTURAL HERITAGE: POLICIES, PROJECTS, AND INNOVATIONS



**I. Lytvynchuk, V. Yakobchuk,
V. Dovzhenko, O. Mosiienko**

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MONOGRAPH

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at the Fil. Dr. Jan-U. Sandal Institute.

Sandal Institute

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Foreword

Social entrepreneurship is a special form of management which purpose is to run a production function in such a way as to ensure increased value for all the parties participating in that function, I defined in 2004. The latest book, *Managing Local Cultural Heritage: Policies, Projects, and Innovations* by Lytvynchuk, Yakobchuk, Dovzhenko, and Mosiienko provides precisely this overview and a deep understanding within the processes of museum science, cultural preservation and analyses. This book is aimed both at a national as well as at international readership and at a wide range of specialists, researchers, policymakers, students, entrepreneurs, businesspeople and the public. The processes are admirably demonstrated in both a pedagogical and analytical sense.

Managing local cultural heritage is important for democracy because the preservation of artifacts, narratives and factual incidences represents both an individual, personal and familial memory, but also a collective and long-term memory for a nation and its people. Innovation is managing projects in a new and different way; doing something that previously could not be done, or was not as efficient or economical, and this development is perfectly taken care of by entrepreneurs.

The authors of this book are specialists in social entrepreneurship and museum science, and their collective work

represents a new insight into the management of local cultural heritage and the science of preservation of artifacts.

There is no doubt that this book will be of utmost interest and great use in museum science and the topics of policy making, public administration in its field and development strategies, projects and innovation, and the book will be recognized as an important contribution to the development of local cultural heritage management and democratic development.

I am very pleased that the authors have written this important and captivating book.

Finstadjordet, August 2025

Prof. Fil. Dr. Jan-Urban Sandal

Preface

In times of profound societal transformation and external challenges, local cultural heritage emerges not only as a repository of collective memory, but also as a strategic resource for sustainable community development. For Ukraine, which is undergoing simultaneous processes of decentralization, digitalization, and post-crisis recovery, the effective management of local cultural heritage has acquired renewed urgency. This monograph responds to that urgency by offering a structured, interdisciplinary analysis of the policies, practices, and innovations shaping local heritage governance.

The work brings together theoretical frameworks and practical models, with a particular emphasis on the intersection of heritage preservation and public administration. Drawing on European and international standards, we explore mechanisms for aligning local heritage strategies with broader social, legal, and economic goals. Special attention is paid to the case of Poland – a post-socialist EU member state whose governance trajectory offers valuable insights for Ukraine and other countries navigating similar transitions.

This monograph may also be of interest to international scholars exploring heritage governance in borderland, post-

socialist, or crisis-affected contexts. The Ukrainian case reveals how cultural heritage is not only a matter of identity preservation but also a tool for local development, civic mobilization, and institutional trust-building. This makes Ukraine's experience particularly relevant for comparative research, international collaboration, and the design of adaptive governance models in volatile environments.

Recognizing the role of branding, digital tools, and community engagement in rethinking heritage, the monograph devotes a dedicated section to innovative approaches in promoting and interpreting cultural assets. We also address the growing importance of digital transformation, crisis resilience, and public-private partnerships in heritage management – topics that are often underrepresented in academic literature.

The structure of the book allows the reader to move from foundational concepts to strategic implementation, from advocacy to policy development, and finally to evaluation and impact assessment. The inclusion of newly added chapters on digital governance and performance indicators reflects our intent to integrate heritage discourse with contemporary public policy trends. This monograph is intended for scholars, local government officials, cultural policy makers, heritage professionals, and community leaders. We hope it contributes

not only to the academic debate, but also to real-world decision-making processes in the field of cultural heritage management.

We extend our gratitude to all institutions, communities, and experts whose insights, practices, and perseverance continue to shape a more inclusive and resilient heritage landscape. In particular, we owe special thanks to the **Sandal Private Museum at the Fil. Dr. Jan-U. Sandal Institute**, which has provided not only inspiration but also a living example of how cultural heritage can be preserved and interpreted with vision and dedication. The museum's unique collection and its mission of safeguarding knowledge across generations have deeply influenced our reflections on the role of heritage in times of societal change.

Our sincere appreciation also goes to **Professor Jan-U. Sandal**, whose intellectual generosity, encouragement, and long-standing commitment to advancing knowledge in the humanities and social sciences have been invaluable to the development of this work. His scholarly and personal example serves as a reminder that heritage, when nurtured with integrity and creativity, becomes a bridge between cultures, epochs, and communities. Without such support and inspiration, the scope and depth of this monograph would not have been possible.

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PART 1.

CONCEPTUAL FOUNDATIONS AND CHALLENGES OF CULTURAL HERITAGE PRESERVATION

Chapter 1

THEORY OF LOCAL CULTURAL HERITAGE MANAGEMENT

1.1. The Concept of Local Cultural Heritage

Local heritage is a fundamental component of both cultural and national identity. As one of the key elements of local culture, it concentrates integrative potential, shaping a unified system of values and behavioral patterns, and creating a unique civilizational worldview. Local heritage provides social stability during times of identity search, whether local or national. It reflects traditions, customs, and social ways of life. Elements of local and social heritage are passed down through generations, forming the identity of peoples, nations, and communities [6].

Heritage defines the individual characteristics of a community, and more broadly, of a civilization. The loss or degradation of heritage is tied to border disruption and identity shifts. Thus, heritage powerfully unites and mobilizes communities. Caring for heritage – both tangible and intangible – is embedded in state policy. Around culture and its mechanisms, such as traditions, norms, and values, social capital rooted in trust is built [3].

The significance of local heritage extends beyond identity and historical preservation. It shapes personality, defines daily life, and promotes inclusive growth. Cuisine, rituals, art, and

culture reveal as much about a country as its politics or geography [4].

Local heritage is not only material cultural assets, but also our memory and identity. It is a category with its own dynamic, reflecting both societal attitudes toward values and the process of reinterpreting them. It also signifies the growing importance of local heritage as a shared resource, with access recognized as a fundamental human right.

Today, it is indisputable that local heritage fulfills a range of societal functions, thereby supporting sustainable development. It carries educational, cognitive, scientific, and aesthetic significance, helping to make sense of the present and the historical past of the Ukrainian people. Failure to appreciate local heritage leads to public neglect and contributes to the erosion of generational continuity and disregard for the natural and cultural values of Ukraine and the global community.

The oldest monuments of humanity, some dating to early human history, are unique witnesses of the past and essential sources of knowledge for future generations. Since the Paleolithic era, these monuments have stood as the only evidence of human evolution, encoding political, religious, moral, and aesthetic norms and values of past generations. By reflecting the stages of civilizational development, historical and cultural monuments simultaneously serve as sources of historical knowledge and tools for shaping the worldview of contemporary society [15, p. 68].

As V. Khanstantynov notes, local heritage is a broad term that lacks a precise definition. It can be seen as the legacy of previous generations, including both tangible and intangible assets [13].

According to I.V. Bukovsky, local heritage consists of immovable and movable property together with related spiritual values, historical and customary phenomena, regarded as the basis for legal protection in the interest of society, its development, and transmission to future generations through clearly accepted historical, patriotic, religious, and artistic values, significant for identity and continuity of political, social, and cultural development, and honoring historical events [1].

S.V. Vytkaľov and V.H. Vytkaľov define local heritage as the collection of immovable and movable objects that carry historical, patriotic, scientific, artistic, or religious value, requiring legal protection for the benefit of society, its development, and preservation for future generations [2].

The Law of Ukraine 'On the Protection of Cultural Heritage' does not reconcile these concepts and considers local heritage simply as a set of immovable material objects [12]. Meanwhile, the Law of Ukraine 'On the Export, Import, and Return of Cultural Values' [7] effectively serves as the foundational act for movable heritage, reducing 'cultural values' to movable assets. Some references to the unity of movable and immovable heritage and their relation to cultural values are found in the Laws of Ukraine 'On the Protection of Archaeological Heritage', 'On Museums and Museum Affairs'

[9], and 'On the National Archival Fund and Archival Institutions' [10]. At the same time, the Law of Ukraine 'On Culture' [8] refers to both local heritage and cultural values without establishing any hierarchy. Intangible local heritage is somewhat sidelined, despite Ukraine's ratification of the UNESCO Convention for the Safeguarding of Intangible Cultural Heritage.

Scholars present various interpretations of local heritage, and many Ukrainian authors view the legal definition as vague and lacking substance. They argue that the concept of 'local heritage', as a cornerstone of national cultural identity, requires a comprehensive revision that reflects both international legal experience and the contemporary Ukrainian context.

Thus, based on the analysis of the term 'local heritage' in sources [1, 2, 3, 13, 15], and its related terminology, several conclusions can be made. First, local memory forms the foundation of local heritage, serving as a mechanism for passing down and reinterpreting heritage across generations. Second, a cultural monument corresponds to the concept of cultural values as a part of the whole, representing its tangible manifestation. Third, while some scholars consider 'cultural values' and 'local heritage' synonymous, their key difference lies in temporality: local heritage inherently possesses the quality of age and gains value over time, whereas cultural values are assessed in the present.

Consequently, while all items of local heritage can be considered cultural values, not all cultural values qualify as local

heritage. This relationship suggests that the concept of 'local heritage' is broader than 'cultural values', with the latter being a subset of the former. Finally, it is important to recognize that the image of local heritage is currently evolving. Once viewed through a utilitarian lens as a collection of artifacts from the past, today it is seen as a driving force of social development, an economic and sociopolitical resource, a stimulus for daily transformation, and even a factor of ecological balance. Thus, local heritage is shifting from a passive cultural element to an active constituent in the formation of communities, contributing to modernization and dynamic societal growth.

1.2. Classification of Local Heritage

It is important to refer to the generally accepted definition of local heritage as recorded and formally introduced into scientific circulation in the UNESCO Convention "Concerning the Protection of the World Cultural and Natural Heritage" (1972). Article 1 of the Convention classified the concept of local heritage into three categories:

- Monuments: architectural works, monumental sculptures or paintings, elements or structures of archaeological origin, rock art, cave dwellings, as well as composite properties of these elements possessing outstanding universal value from the standpoint of history, art, or science.

- Groups of buildings: groups of separate or connected buildings which, by virtue of their architecture, homogeneity, or place in the landscape, possess outstanding universal value from the standpoint of history, art, or science.

- Sites: works of humans or the combined works of nature and humans, including archaeological sites, which hold exceptional value from a historical, architectural, ethnological, or anthropological perspective.

This definition, formulated over 30 years ago, is not an exhaustive list of elements of cultural and natural heritage (LCNH). It is valid for defining material local heritage and suitable for utilitarian purposes related to legal and property relations but does not reflect its role and place in the contemporary world.

In the composition of “local heritage” objects, T. V. Kara-Vasylieva identifies movable and immovable material objects, as well as intangible elements that are part of spiritual culture or represent a combination of material and spiritual heritage. These include moral and aesthetic norms of various peoples across different historical eras and geographic environments; established linguistic features, norms, and behavioral patterns; languages, dialects, and vernaculars; national customs and traditions shaped by the geographic conditions of human habitation; historical toponyms, folklore, crafts, and arts. The local heritage of a country is a crucial element in the life of every nation [5].

According to O. Zakharovskiy, local heritage can be categorized into the following key dimensions:

- Cultural objects (cultural traits, artifacts, and forms of local heritage in both tangible and symbolic expressions).
- Cultural processes (the genesis of cultural objects, their functioning, and communication).
- Cultural properties (universality, uniqueness, locality, typicality, and technological aspects of local heritage).
- Functions of local heritage (sociocultural organization and regulation, understanding of the environment, accumulation, selection, and transmission of social experience, and information exchange).
- Meanings of local heritage (cultural semantics, evaluations and assessment criteria, hermeneutics and ontology of heritage).
- Values of local heritage (vital, material, artistic, ideological, moral, religious, and social values) [4, p. 118].

The classification of LCHOs is essential for understanding their potential as tourism and excursion resources. Several classification approaches are applied [4, p. 119]:

- By the field of activity with which a group of heritage objects is associated – scientific, technical, or artistic heritage (including music, literature, architecture).
- By the scientific domain for which a type of heritage object serves as a source of knowledge – for example, historical heritage (including archaeological and archival).

- By the specific objectives of a discipline (e.g., sociology and psychology classify heritage based on personal or subjective perception – as “living” or “dead,” “passive” or “active,” heritage as monument or as environment).

- By legal and preservation classifications that distinguish between “movable” and “immovable” objects (based on heritage protection legislation).

V. V. Demian proposes grouping local heritage into distinct cultural blocks such as ecological, economic, ethical, political, legal, and artistic cultures. Each block is supported by its respective heritage foundation. Moreover, heritage may be classified based on the concept of territorial cultural organization, with levels including global, national, interregional, regional, and local [3].

V. V. Khymynets and H. I. Tsymbolynets present a comprehensive classification of local heritage, where proposed types reflect object-specific features. These include:

- Archaeological: ancient settlements; layers of historical cultural deposits; remnants of ancient habitations, encampments, fortifications, military camps, production sites, irrigation systems, roads; sacred sites and structures; burial mounds; megaliths; cemeteries; petroglyphs; early human fields.

- Historical: buildings or their complexes (ensembles); individual burials and necropolises; landmarks associated with significant historical events or notable individuals, and the everyday life and culture of people.

- Monumental art: works of fine art, both independent and associated with archaeological, architectural, or other heritage sites or ensembles.

- Architecture and urban planning: architectural ensembles; historic streets; remnants of ancient layouts and construction; historic centers; quarters; sites of industrial heritage; individual architectural monuments and associated monumental, decorative, and visual art pieces; public squares.

- Garden and park art: combinations of park design with natural or human-created landscapes.

- Landscape heritage: natural areas of historical value [14].

Objects of local heritage management encompass a wide range of resources possessing historical, cultural, natural, or aesthetic value for a specific community or region. These can be classified into several categories, including:

1. Tangible Heritage

- Immovable monuments: historical buildings, archaeological sites, religious structures, fortifications, industrial sites, etc.

- Movable monuments: works of art, artefacts, collections, books, documents, photographs, etc.

- Underwater heritage: sunken ships, submerged archaeological sites, coral reefs, etc.

2. Intangible Heritage

- Traditions: oral history, customs, rituals, crafts, knowledge, languages, etc.

- Performing arts: music, dance, theatre, puppetry, culinary arts, etc.

- Social practices: festivals, fairs, rites, ceremonies, etc.

3. Natural Heritage

- Natural landmarks: picturesque landscapes, caves, waterfalls, mountains, rivers, lakes, etc.

- Biosphere reserves: areas preserving unique ecosystems and biodiversity.

- Parks: natural and artificial parks, botanical gardens, zoos, etc.

4. Cultural Landscape Objects

- Historic towns: cities with unique architecture, planning, and historic atmosphere.

- Rural landscapes: traditional rural areas with unique architecture, agricultural practices, and cultural features.

- Industrial landscapes: former industrial zones that retain their historical significance and potential for revitalization.

It is important to note that not all heritage objects have a clearly defined category. Many of them fall under multiple categories simultaneously. Thus, the local heritage of each nation is not merely a set of cultural values inherited from previous generations. Primarily, it is a source of vitality from which each nation draws its life force, without which the successful development of the state is virtually impossible. The local heritage of a nation plays a critically important role in preserving historical memory, shaping and developing the collective memory and national consciousness of its people,

their sociopolitical views, and guiding their choices in contemporary events and processes.

In the case of the Ukrainian people, the preservation and study of historical local heritage is tasked with an additional strategic mission. As artefacts of past events, this heritage testifies to the continuity of Ukrainian nationhood, its distinctiveness from neighboring nations – including the so-called “Slavic brothers” – its long-standing struggle against oppression, and the pursuit and attainment of independent statehood, later lost. By appealing to tangible and intangible local heritage sites – silent witnesses of historical past – researchers can construct a real (or close to real) picture of Ukrainian history and to assess and analyze it objectively.

It is also important to emphasize that although heritage objects belong to the past, local heritage itself serves present-day purposes. Therefore, local heritage today is both an object of protection and a potential resource that should be harnessed for the future development of the nation.

1.3. Governance Principles and the Structure of Heritage Management

The management of local heritage implies a comprehensive approach that includes:

Identification: searching for and identifying heritage objects.

Assessment: determining the value and significance of heritage objects.

Protection: taking measures to preserve heritage objects from destruction, damage, or loss.

Management: developing and implementing management plans for heritage objects.

Utilization: promoting use of heritage objects for educational, scientific, cultural, and tourism purposes.

The management of local heritage is an important component of sustainable development, as it supports the preservation of cultural identity, stimulates economic growth, and enhances the quality of life.

Principles of Local Heritage Management

Local heritage management is based on several key principles that ensure the preservation and use of historical, cultural, and natural resources for future generations:

1. **Comprehensiveness:** Heritage management should be comprehensive and encompass all types of heritage, including tangible and intangible, movable and immovable, ancient and contemporary.

2. **Participation:** It is important to involve all stakeholders in the decision-making process, including communities, indigenous peoples, landowners, scholars, and government representatives.

3. **Sustainability:** Management should be based on sustainable development principles, ensuring heritage preservation for future generations without harming the environment.

4. **Integration:** Heritage management should be integrated with other planning and decision-making areas, such as urban development, economic growth, and tourism.

5. **Precaution:** Heritage should be handled carefully, using approaches based on scientific research and best practices.

6. **Respect:** Management should be grounded in respect for the diverse values and traditions associated with heritage.

7. **Responsibility:** It is important to clearly define who is responsible for heritage preservation and management, and to ensure the necessary resources are available.

8. **Transparency:** Decision-making processes regarding heritage management must be accountable to the public.

9. **Education:** Raising awareness of heritage significance and encouraging education and training in this field is vital.

10. **International cooperation:** Heritage management is more effective when supported by cooperation with other countries and international heritage organizations.

These principles serve as the foundation for effective and ethical local heritage management. Their practical implementation may vary depending on the context and specific characteristics of a locality.

Management of cultural heritage requires efforts from the state, the public, and the private sector. At each level, specific important tasks should be performed.

Levels of Heritage Management

State Level

- Develop and implement policies and legislation for heritage preservation. This includes defining and classifying heritage objects, setting rules for their protection and use, and providing funding for preservation.

- Establish heritage protection bodies and institutions. These bodies should have the necessary resources and authority to fulfill their preservation tasks.

- Support research and study of cultural heritage. This helps to better understand the value and significance of heritage and develop effective preservation methods.

- Promote education and raise awareness of cultural heritage. This helps people understand the importance of preservation and engage them in this process.

Community Level

- Participate in heritage protection activities. This can include volunteering in restoration projects, participating in public hearings and discussions on heritage preservation issues, and supporting organizations engaged in heritage protection.

- Support local traditions and crafts. This helps maintain living cultural heritage and pass it on to future generations.

- Learn about and honor the cultural heritage of one's community. This deepens understanding of one's history and identity.

- Use heritage as a resource for development. Cultural heritage can be used to develop tourism, education, and other sectors.

Private Sector Level

- Invest in heritage preservation. This may include funding restoration projects, support museums and other cultural institutions, and developing new products and services related to heritage.

- Cooperate with government bodies and public organizations. This helps ensure effective and sustainable heritage preservation.

- Use heritage in marketing and promotion. This can help raise awareness about heritage and attract new customers.

- It is important to remember that the preservation of cultural heritage is a shared responsibility. Every individual can contribute to this cause, even though by small steps.

1.4. Historical Evolution of Heritage Governance Approaches

The history of cultural heritage management spans thousands of years and varies depending on the region and

civilization. Cultural heritage management traces its origins back to ancient times when valuable objects and traditions became subjects of preservation and study. In ancient civilizations such as Egypt, Babylon, or China, there were specific mechanisms for preserving and protecting cultural values, including architectural monuments, religious structures, and historical artifacts.

In medieval Europe, church organizations and feudal lords were often responsible for preserving manuscripts, religious objects, and other cultural assets. Churches and monasteries safeguarded manuscripts and icons, regarding them as sacred. During the Renaissance and the Enlightenment, interest in ancient heritage grew, leading to the creation of the first public museums and libraries. From the early modern period onward, national museums and archives began preserving the cultural values of nations.

The history of cultural heritage management reflects the evolution of approaches to preservation, research, and enlightenment in the cultural sphere. Initially, this field was primarily associated with the preservation of architectural monuments and museum collections. However, over time, under the influence of globalization and scientific advancements, cultural heritage management has become more complex and comprehensive.

In the 19th century, the first legislative acts aimed at protecting and preserving cultural heritage appeared, along with organizations dedicated to safeguarding heritage. During this

period, international organizations such as UNESCO were established, actively working to protect global cultural heritage. After World War II, the UN and UNESCO played a key role in developing international standards and fostering cooperation in heritage protection.

Additionally, new methods and technologies for conserving and restoring cultural objects emerged. Modern approaches now include not only physical preservation but also research, education, and the inclusion of diverse socio-cultural groups in the heritage management process. Technological progress, particularly digital technologies, has had a significant impact on heritage management, enabling documentation, virtual tours, and even restoration of heritage sites.

Thus, in the management of cultural heritage, which has deep historical roots, the following main stages can be distinguished:

Ancient times: In ancient civilizations such as Egypt, Mesopotamia, and Greece, heritage management was evident in the construction of monuments, temples, and other architectural creations.

Middle Ages: With the rise of Christianity and Islam, the preservation of religious monuments began. Monasteries and local authorities took on this responsibility.

Renaissance and Reformation: In Europe, the first national museums started to form. The idea of preserving cultural heritage became relevant for states.

19th–20th centuries: The establishment of the first national monument preservation services, such as the English Heritage Committee.

Post-World War II: The formation of international organizations such as UNESCO to protect global heritage.

Modern era: The development of technologies, including digital tools, enables more efficient management and preservation of cultural heritage.

Today, cultural heritage management encompasses comprehensive approaches, ranging from scientific research to promoting cultural values among the public. Modern state programs and organizations ensure the preservation and protection of cultural heritage. Cultural heritage management includes conservation, restoration, research, promotion, and protection of valuable cultural objects for future generations. The primary goal of this process is to safeguard and pass on cultural heritage to future generations in an intact state.

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Chapter 2

EUROPEAN AND INTERNATIONAL EXPERIENCE IN HERITAGE PROTECTION

2.1. Social and Legal Standards for Heritage Preservation (EU and UNESCO)

In recent years, the European Union has increasingly focused on developing the cultural dimension of European integration, noting that culture acts as a “cementing” element for politics, the economy, and especially for the social sphere. Thus, culture can be viewed as one of the fundamental ideas that motivated the creation and development of the European Community and later the European Union. Since the 1970s, the EU has launched a series of active initiatives in the field of culture and began to incorporate cultural aspects as central to European integration policy starting in the mid-1980s. The Maastricht Treaty of 1992 turned culture into an official dimension of EU policy [1].

Culture underpins most of the Sustainable Development Goals (SDGs) of EU countries – economic, social, and environmental objectives – as the three pillars of sustainable development. At the same time, culture and creativity make a transversal contribution to each of these pillars. Therefore, one of the main priorities of sustainable development policy is to develop a new direction for protecting and preserving global

cultural and natural heritage, supporting creativity, and fostering dynamic cultural sectors that are fundamentally important for addressing contemporary challenges. This approach reflects a people-centered model of development, whose core principle is “People First” (World Bank), and is based on mutual respect and open dialogue among cultures to maintain peace.

UNESCO also emphasizes that the logic of cultural events today is shaped by two dominant factors: the large-scale conflict in Ukraine and the European legal framework for the preservation of cultural heritage. Ukraine signed the Convention for the Protection of Cultural Property in the Event of Armed Conflict (The Hague Convention of 1954) on February 6, 1957 (First Protocol for the Protection of Cultural Property in the Event of Armed Conflict of 1954) [2]. The Hague Convention is the first and most comprehensive multilateral treaty dedicated exclusively to the protection of cultural heritage both in peacetime and during armed conflict. It aims to safeguard cultural property such as architectural monuments, works of art or history, archaeological sites, artworks, manuscripts, books, and other objects of artistic, historical, or archaeological interest, as well as scientific collections of any kind, regardless of their origin or ownership status.

The obligations undertaken by the states parties to the Convention serve to protect cultural heritage through the following measures:

- Taking preventive measures such as preparing inventories, planning emergency measures to safeguard property

from fire or building collapse, and preparing for the removal of cultural property to safe locations.

- Developing initiatives to ensure respect for cultural property located on their own or other states' territories. This entails refraining from using such property in ways that might expose it to destruction or damage during armed conflict, as well as abstaining from any acts of hostility directed against it.

- Including cultural property of great importance in the International Register of Cultural Property under Special Protection to obtain special protection for such items.

- Marking certain important buildings and monuments with the distinctive emblem of the Convention.

- Providing space for potential shelters for movable cultural property.

- Establishing special units within the armed forces responsible for the protection of cultural property.

- Introducing penalties for breaches of the Convention.

- Promoting the Convention to the public and targeted groups such as heritage professionals, military personnel, and law enforcement agencies.

The World Heritage Committee, the main body responsible for implementing the Convention, has developed clear criteria for including sites on the World Heritage List and for providing international assistance through the World Heritage Fund. Thus, UNESCO's activities in cultural heritage preservation remain undeniably relevant.

The role of the European Union is to assist and complement the actions of its member states in preserving and promoting Europe's cultural heritage. To this end, the European Commission has developed several relevant policies and programs. It also supports and encourages political cooperation among member states and stakeholders in the field of cultural heritage. The body responsible for EU cultural policy is the *Directorate-General for Education, Youth, Sport and Culture* (DG EAC). The EU addresses common challenges, ranging from the impact of digital technologies to supporting innovation in the cultural and creative sectors. It also supports measures for cultural heritage preservation and promotes cooperation and transnational exchanges among cultural institutions in member countries.

The cultural sectors can also benefit from specific funding opportunities under programs such as *Horizon Europe*, the *Single Market Program*, the *Recovery and Resilience Facility*, and cohesion policy funds. Other initiatives include the *European Heritage Days* and the *European Capitals of Culture*, which date back to the 1980s [1].

Cultural heritage is an important resource for economic growth, employment, and social cohesion in the EU. It helps to revitalize urban and rural areas and promotes sustainable tourism. In the European Union, over 300,000 people work directly in the heritage sector, and 7.8 million jobs are indirectly linked to heritage (e.g., in hospitality, interpretation, and security). Furthermore, the EU cooperates with international

organizations such as UNESCO, the Council of Europe, and the Organization for Economic Co-operation and Development (OECD) to combat the illicit trafficking of cultural property and to promote local development through culture.

Thus, it should be noted that the Council of Europe has developed and implemented several fundamental conventions that have been incorporated into the national legislation of European countries, creating a foundation for preserving the vast and powerful cultural heritage of Europe, of which Ukraine's cultural heritage is an integral part.

2.2. Lessons from Poland: Local Heritage Policy in a Post-Socialist EU Member State

Foreign experience of local heritage protection and the possibilities of its application in Ukraine are proposed to be considered using the example of Poland. After communism, Polish culture experienced a “transitional syndrome,” which, unfortunately, still characterizes public cultural management in Ukraine.

At the beginning of the 21st century, state policy regarding culture and local heritage in Poland lagged the pace of economic transformation, which deepened the local crisis in Poland and weakened the potential of the country's local heritage in both material and intangible dimensions [2].

The changes introduced in Poland in the local sphere resulted not only from its internal evolution but also from external reforms, including such fundamental ones as: democratization of the state, local self-government reform, decentralization, privatization, tax system changes, and finally, European integration [1]. This is why the experience of Poland can be useful for Ukraine, which is completing decentralization reform and aspires to European integration.

The heritage protection system in Poland is formed not only by directly related elements, such as public administration bodies, heritage protection funding, and legislative acts regulating heritage protection, but also by broader aspects like politics, economy, social life, culture, education, and media. Therefore, heritage protection in Poland largely depends on the overall situation in the country. Consequently, Poland's heritage protection system is not autonomous, and its reform remains limited.

At the start of cultural heritage management reforms in Poland, the most important elements forming the evaluation of the heritage protection system were identified, namely:

- The dominant form of ownership of historical buildings.
- Responsibility for monument protection.
- Funding for monument protection.
- The status of historical buildings.
- The role of environmental services [2].

Analyzing the dynamics of these elements makes it possible to capture the scale of transformations that occurred in

Poland after 2000 and to trace the direction of the heritage protection system's evolution. Its dependence on fundamental political system changes is also evident. For example, the inevitable privatization of historical resources and the subsequent transfer of responsibility and funding for their preservation to new owners was a real revolution in the system, directly leading to the marketization and commercialization of monuments [1].

However, privatization, accompanied by a programmatic limitation of the state's responsibility and role in monument protection, may lead to a loss of control over local heritage resources. Therefore, if Ukraine chooses the path of privatization of local cultural heritage sites (LCHS), it will be necessary to ensure that public administration bodies do not lose influence over determining forms of historical monument preservation and that their role does not reduce merely to commenting on owners' ideas.

The Law of Poland "On the Protection and Care of Monuments" adopted in 2003, which regulates local heritage protection, encompasses three levels:

- The internal legal system of monument protection.
- The relationship of the monument protection law with existing legislation regulating other social relations (including construction law, land management law, cemetery law).
- Systemic solutions that encourage broader public participation in funding heritage protection and management [1].

A key issue in effective monument protection in a democratic legal European state is the principle of limiting property rights in the public interest. By subordinating private interests to the public, the state also creates a support system that compensates for the additional obligations imposed on monument owners. Practices in European countries vary in this regard. However, it often involves using tax mechanisms (benefits for monument owners) and establishing a clear system of subsidizing conservation works in historical buildings from state funds [1].

The foundation of effective state heritage protection policy should also include the competence and apolitical nature of heritage protection services. Monument protection cannot be isolated from the broader context – it concerns not only state patronage over culture but also spatial policy rules, public education on heritage protection, and, ultimately, political issues.

The Law of Poland "On the Protection and Care of Monuments," adopted in 2003, is not the only legal act regulating local heritage protection.

The Constitution of the Republic of Poland serves as a natural foundation for creating a state strategy for monument protection in Poland. From the formulations concerning the protection of cultural values contained in Articles 5 and 6, it follows that "The Republic of Poland shall safeguard national heritage," and "shall create conditions for the dissemination and equal access to cultural goods, which are a source of identity for

the Polish people, their survival, and development." When constructing a legislative model for the protection of cultural values, other constitutional principles cannot be ignored, including:

- The principle of a democratic legal state implementing the principles of social justice (Art. 2).
- The principle of state environmental protection, based on the principle of sustainable development (Art. 5).
- The principle of decentralization of public power (Art. 15, para. 1) and the principle of participation of local self-government bodies in exercising public power (Art. 16, para. 2).
- The principle of property protection and inheritance rights (Art. 21, para. 1), from which the constitutional legislator allows deviation in the institutional form of expropriation, permissible "only when carried out for public purposes and for fair compensation" (Art. 21, para. 2) [1].

Organizational issues of cultural value protection in Poland remain open. This is a fundamental systemic issue concerning the subjective definition and place of "local heritage protection" within the public administration system. This is important because the measure of effectiveness in transferring heritage protection powers to the local level is not only the assignment of certain powers but, above all, the degree of organizational independence.

Ideally, the sphere of cultural value protection should not remain under the voivode's (regional governor's) responsibility,

as such a systemic solution implies complete dependence of local managers on their direct superior.

In the area of territorial management, it is essential to implement solutions that ensure the active and direct participation of local cultural heritage management bodies in establishing heritage protection measures within local spatial development plans, i.e., plans developed at the commune level. The scale of protective effectiveness here depends on the active participation of local heritage protection officers at many stages of the spatial planning procedure and on the scope of their authority in shaping its content. Therefore, it is necessary to introduce a systemic model of effective legal arguments for nature and heritage protection at the local level [2].

Poland succeeded in creating an effective local heritage protection system because the existing system became efficient legally, organizationally, and financially through the socialization of the heritage protection process.

Social capital can become an opportunity for Ukraine to protect local heritage and use it as a development resource. This concerns both tangible and intangible heritage, whose importance is rapidly growing.

The strategy of developing social capital for local heritage covers various issues, which can be divided into the following areas, for example:

1. Using social capital in the process of creating and identifying local heritage. These processes are based on social connections and collective memory. Their "product" includes,

among other things, memorial sites and the strengthening of community spirit.

2. Starting work on a comprehensive heritage education system, understood primarily as education respecting tradition and the value of its testimonies. At the same time, heritage education should be understood not only as a "conversation" about the past but also as a reflection on the present and future. Such an educational model should teach, in addition to responsibility for heritage, respect for cultural diversity and the ability to engage in dialogue. The most important space for creating social capital in this area is the school!

3. Policy for shaping broad public heritage awareness. This should not only be a necessary condition for effective local heritage protection but also a foundation for building civil society. This requires, among other things, proper cooperation with the media.

4. State support for active civil society participation in the process of protecting and caring for monuments, especially the proper use of the potential of non-governmental organizations. Strengthening societal activity in heritage protection processes is accompanied by effective state policy to reinforce this social capital. Numerous NGOs actively operating in the "heritage sphere" should receive adequate state support.

5. Creating mechanisms for using synergies in cooperation among municipal authorities, NGOs, and the private sector to effectively manage heritage at the local level. This can

be an important tool for local development as well as a decentralization instrument of the state.

6. Using local heritage as a resource for sustainable regional development and cultural landscape protection. Areas requiring coordinated regional policy in this regard include environment; social development; culture; education; tourism and economic development; spatial planning.

7. Strengthening and stimulating cooperation among various actors: state institutions, the education system, cultural institutions, NGOs, industry and private companies, and digital networks based on digital technologies.

Drawing on Poland's experience, among the most important and urgent tasks currently facing state bodies responsible for monument protection and care in Ukraine are:

- Creating alternative, extra-budgetary mechanisms for monument protection funding like Poland's local heritage protection system.
- Building a system for managing local heritage resources primarily based on social economy principles rather than monument commercialization.
- Better use of existing legal solutions for effective cultural landscape heritage protection.
- Conducting work on a comprehensive heritage education system, understood primarily as education in respect for tradition and the value of its evidence, as well as studying effective heritage resource management.

- State support for active civil society participation in monument protection and care processes, especially the proper use of NGO potential.

- Ratification of international conventions on local heritage protection and Ukraine's strict adherence to their letter.

Thus, local heritage in Poland is not only a set of historical objects preserved in a territory. On the one hand, it is a symbolic layer associated with the perception of heritage as sacred, and on the other hand, it is a market product. In this sense, effective management of local heritage resources, using Poland's experience, can become a main direction for improving public cultural heritage governance in Ukraine.

2.3. Heritage Governance under Crisis: War, Climate Change, and Urban Transformation

In the 21st century, heritage governance has become increasingly complex, facing multi-dimensional crises that challenge traditional models of preservation and management. These crises include armed conflicts, accelerating climate change, and rapid urban transformations.

Each factor, on its own, imposes serious threats to cultural heritage; together, they form a compounded risk landscape that demands new adaptive strategies, strong international cooperation, and innovative governance models.

War and Armed Conflict

Throughout history, cultural heritage has often become a casualty of war. Monuments are destroyed, artifacts are looted, and entire historical landscapes are erased as an act of cultural suppression or strategic military tactic. The deliberate targeting of cultural sites represents an assault on the identity, memory, and continuity of communities. As articulated in the Hague Convention for the Protection of Cultural Property in the Event of Armed Conflict (1954), states are obligated to safeguard cultural property during conflicts, prevent theft and destruction, and respect cultural heritage as shared human wealth [6].

In Ukraine, for instance, the ongoing military aggression has led to severe damage to historical buildings, churches, and museums. These losses are not only material but also deeply symbolic, representing an attempt to undermine national identity and collective memory. International organizations, including UNESCO and ICOMOS, have called for immediate protective measures, emergency assessments, and support for local stakeholders to mitigate further losses [5][7].

Climate Change and Heritage Vulnerability

Climate change presents a slower but equally devastating threat to cultural heritage worldwide. Rising sea levels threaten coastal heritage sites; increased flooding damages historic city centers; droughts and wildfires affect archaeological sites and cultural landscapes. The impact of climate change extends to intangible heritage as well, disrupting traditional livelihoods,

seasonal rituals, and agricultural practices that rely on stable environmental patterns.

ICOMOS has highlighted the urgent need for integrating climate resilience into heritage management plans [5]. This includes developing risk maps, implementing adaptive conservation measures, and establishing early warning systems. In many European countries, cultural heritage is now explicitly addressed within climate action plans, reflecting a shift toward holistic and interdisciplinary approaches [3][5].

A significant challenge lies in balancing preservation with adaptation. For example, while constructing sea walls may protect a historic city from rising tides, it may also alter the cultural landscape and the relationship between communities and their environment. Thus, decision-making must be inclusive and context-sensitive, involving local populations, scientists, and policymakers.

Urban Transformation and Heritage Integration

Urbanization is one of the defining trends of modern development. While cities offer economic opportunities and improved infrastructure, rapid and often unplanned growth threatens cultural heritage assets. The expansion of urban areas can lead to the demolition of historical neighborhoods, loss of cultural landscapes, and the marginalization of intangible heritage traditions.

The Council of Europe has emphasized the importance of integrating cultural heritage into urban planning processes to foster inclusive, sustainable, and culturally vibrant cities [3].

This approach involves using heritage as a driver for social cohesion, economic regeneration, and place-making. Adaptive reuse of historic buildings, creation of heritage trails, and promotion of traditional crafts are some of the strategies that balance development with preservation.

Moreover, heritage-sensitive urban planning helps enhance resilience to future crises. Cities that incorporate green spaces, preserve historic centers, and maintain local cultural practices are better equipped to withstand environmental, economic, and social shocks [3][5].

Emergency Response and Community Involvement

Another critical dimension is preparedness and emergency response. Organizations like ICCROM have pioneered the concept of “First Aid to Cultural Heritage in Times of Crisis,” which emphasizes proactive planning, capacity building, and rapid intervention during and after emergencies [4]. Community involvement is central to this model, empowering local actors to safeguard their heritage assets, document damages, and participate in recovery efforts.

Community-based approaches ensure that heritage conservation is not only about physical protection but also about maintaining social fabric and cultural identity. During crises, local knowledge, traditional practices, and collective memory become invaluable resources for effective response and resilience building.

Cross-border cooperation and shared expertise help develop standardized protocols, exchange best practices, and

facilitate funding for emergency interventions. Collaborative initiatives also highlight the importance of cultural heritage as a universal human right, reinforcing commitments to its protection irrespective of national borders.

EU policies further promote transnational projects, cultural exchanges, and funding mechanisms that support the safeguarding of heritage in the face of common threats [3]. Such programs encourage dialogue among states, NGOs, and local communities, fostering an integrated European cultural space.

The convergence of war, climate change, and urban transformation requires heritage governance to become more flexible, interdisciplinary, and inclusive. Effective responses must involve preventive measures, adaptive management, and active community engagement. International conventions, regional cooperation, and local action must work together in a coordinated manner to ensure that cultural heritage continues to be a source of identity, memory, and resilience for future generations. While each crisis poses unique challenges, they also offer an opportunity to reimagine heritage governance as a dynamic and forward-looking field. Protecting heritage in times of crisis is not merely about preserving the past but about safeguarding the foundations of human dignity and cultural diversity.

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PART 2.

PROMOTION AND DIGITALIZATION OF LOCAL CULTURAL HERITAGE: A CASE STUDY OF UKRAINIAN COMMUNITIES

Chapter 3

MODERN APPROACHES TO BRANDING AND PROMOTION OF LOCAL CULTURAL HERITAGE

3.1. Heritage Branding and Marketing

The Essence and Role of Historical and Cultural Branding and Promotion. Historical and cultural branding and promotion play an important role in shaping and maintaining the image of a locality, region, or country, based on its history, cultural values, traditions, and unique territorial features. The essence of historical and cultural branding is revealed through the following categories [7]:

- Historical component – involves using historical facts, events, people, and places to build the image of the region.
- Cultural component – includes traditions, art, cuisine, music, and other aspects of culture that make the area unique.
- Uniqueness – emphasizes and highlights distinctive features that differentiate the area from others (geographical characteristics, ethnicity, folklore).

The role of historical and cultural branding is to:

- Attract tourists – position the locality as an attractive tourist destination based on its history and cultural heritage.
- Create identity – foster a sense of belonging and identity among the local population and encourage patriotic attitudes toward their region.

- Stimulate economic development – promote the development of the tourism industry, hospitality sector, entertainment, and other fields based on the region's historical and cultural heritage.

- Enhance regional prestige – build national and international prestige and influence by presenting its history and cultural values on the global stage.

Historical and cultural branding is formed through promotion. Historical and cultural promotion is a set of measures and tools that allow a local territorial community to communicate information about itself and its historical and cultural uniqueness at different levels of perception and consumption of this information [7]. Historical and cultural promotion is implemented through the following instruments [5]:

- Marketing activities – using various marketing tools such as advertising, PR campaigns, and social media to promote the historical and cultural brand to the public.

- Creative approaches – employing methods such as festivals, exhibitions, and contests that allow people to experience the history and culture of the locality firsthand.

- Partnership and cooperation – working with travel agencies, local businesses, government bodies, and other stakeholders to jointly promote the brand.

Historical and cultural branding and promotion are powerful tools for supporting and developing cultural heritage and economic growth in regional localities. They help create an

image of the region that attracts residents, tourists, and investors by emphasizing its uniqueness and value.

Creating Uniqueness and Attractiveness of the Regional Image. The creation of uniqueness and attractiveness of a regional image is a process of forming a territorial brand.

Simply put, *branding* is the process of creating, developing, and managing the image of a product, service, company, or locality with the aim of positioning them in the market and shaping specific perceptions and associations among consumers [6]. Through promotion, any territorial community can be "seen and heard" by everyone – from residents to tourists and investors.

A historical and cultural brand is a specific form of branding based on the unique history, cultural traditions, architecture, art, cuisine, and other cultural features of a particular location, whether it be a city, region, or country [6]. This approach utilizes these unique aspects to create a recognizable image of the region that attracts tourists, investors, and residents, encouraging them to visit, invest, or engage in other activities.

A historical and cultural brand includes elements such as historical landmarks, cultural events, traditional cuisine, art festivals, folk crafts, and much more. All these helps to strengthen the identity of the local area, preserve and revive the region's cultural heritage, as well as promote the development of tourism, the economy, and social engagement in the particular territory.

The main features of a territorial brand include [9]:

1. Image and identity – reflect the unique characteristics that define the identity and image of the territory.
2. Values and characteristics – represent the core values, traditions, and cultural and natural resources that are important to the territory.
3. Positioning – the territorial brand establishes a unique market positioning to distinguish and differentiate it from competitors.
4. Promotion and marketing – are used to promote and market the territory as an attractive place to live, relax, invest, and do business.
5. Fostering pride and belonging – the territorial brand helps create a sense of pride and belonging among the residents of the territory.

Territorial brands can be developed at various levels – from local communities to national states. They are powerful tools for attracting tourists, stimulating economic development, improving residents' quality of life, and building a positive image and reputation for the area.

A successful territorial brand draws on a region's unique history, cultural heritage, and natural features to create a strong and recognizable identity. By emphasizing these distinctive aspects, regions can develop a compelling image that appeals to both visitors and investors, while also fostering pride and a sense of belonging among residents.

Case example: Zhytomyr region. An illustrative example of this approach is the Zhytomyr region, which has a rich history, diverse cultural traditions, and unique natural landmarks that can serve as key elements of its brand. Highlighting these features helps to make the region more attractive and memorable, strengthening its position on the cultural and tourism map and contributing to sustainable local development.

The regional center of Zhytomyr region is the city of Zhytomyr. It is a city with an ancient and unique history, modern and attractive for tourists and investors. The most recognizable place in Zhytomyr is the *Serhiy Korolyov National Museum of Cosmonautics*. This unique museum is dedicated to the space era and the outstanding rocket engineer Serhiy Korolyov, who was born in Zhytomyr. The museum offers a non-standard perspective on the history of space travel, including unique exhibits and interactive displays (Fig. 3.1).

The S. P. Korolyov Museum of Cosmonautics focuses on uniting the physical and the philosophical, the spiritual cosmos, the cosmos of the starry sky, and the cosmos of the human being and their spirit. Space is seen not only as a technological phenomenon but also as a philosophical and cultural concept, connected to spiritual values. The museum's exhibition, which is a true masterpiece of art, combines scientific concepts and spectacular visuals through musical and plastic imagery, encouraging philosophical and aesthetic reflection on life. The museum space is filled with symbols, making the exhibition

unique – here, the cosmos exists in harmony with humans and their creations. The scientific, historical, and museum content is complemented by artistic and creative elements, helping to form a comprehensive scientific and personal worldview among visitors.



Fig. 3.1. S. P. Korolyov National Museum of Cosmonautics
[<https://cosmosmuseum.info>]

Zhytomyr region is rich in various castles, palaces, churches, monasteries, natural canyons, and reserves.

The Radomyshl Castle-Museum in the town of Radomyshl, Zhytomyr region (Fig. 3.2). This historical fortress dates to the 17th century. The castle has been rebuilt and restored but still retains its medieval charm. The Radomyshl Castle, restored and transformed into a museum, serves as a living testimony to historical eras. Every stone of this fortress tells its own unique story. Visitors can immerse themselves in the world of medieval architecture and see numerous artifacts that reflect the rich cultural heritage of the region.



Fig. 3.2. The Radomysl Castle-Museum

[<https://www.radozamok.com/ru/zamok-radom-sl/>]

The Grokholsky-Tereshchenko Palace in the village of Chervone, Zhytomyr region, is a historical building dating back to the 19th century (Fig. 3.3). The palace was built in the Neo-Renaissance style and held great significance for the cultural and architectural heritage of the region. Its architecture impressed with its scale and refined design. In the past, it was the ancestral home of the noble Grokholsky-Tereshchenko family, who owned extensive lands and held significant influence in the region. Today, the palace attracts the attention of tourists and art historians interested in the architectural achievements of past eras.



Fig. 3.3. The Grokholsky-Tereshchenko Palace

[<https://funtime.com.ua/architecture/tereshchenkv>]

The Church of St. Clara in the village of Horodkivka, Zhytomyr region, is one of the region's prominent religious buildings (Fig. 3.4). The church building dates to the 19th century and is distinguished by its Neo-Gothic architectural style. The structure impresses with its scale and refined details. The Church of St. Clara was founded and constructed thanks to the donations and efforts of residents and clergy. Throughout its history, it has played an important role in the religious and cultural life of the local community. Today, the Church of St. Clara remains an important center of religious life and attracts worshipers and tourists interested in history and architecture. This building serves not only as a place of worship but also as a symbol of peace and spirituality for the local population.



Fig. 3.4. The Church of St. Clara

[<https://kzd.org.ua/parishes/parafiya-sv-klary-gorodkivka>]

In addition to historical and cultural landmarks, the Zhytomyr region has many natural and geographical sites that have become popular cultural recreation areas, also attracting tourists and potential investors.

Korostyshiv Canyon is a unique natural monument located near the city of Korostyshiv in the Zhytomyr region (Fig. 3.5). This place is known for its picturesque landscapes and is popular among tourists and residents. The canyon was formed because of the erosional activity of an ancient river. The cliffs surrounding the canyon are mainly composed of granite, which is quite strong and resistant to erosion.

Korostyshiv Canyon is a popular spot for recreation, picnics, nature walks, and as a scenic photo location. Its beauty and tranquility attract nature lovers and those seeking a break from the urban hustle and bustle. The area around the canyon is

rich in diverse plant and animal species. It is home to many species of birds, insects, and some mammals.



Fig. 3.5. Korostyshiv Canyon

[<https://discover.ua/locations/korosishevsky-kanion>]

Polissia Nature Reserve is the largest nature reserve in Ukraine, protecting unique natural landscapes and wildlife (Fig. 3.6). The Polissia Reserve is a true paradise for nature enthusiasts. It is a place where visitors can observe rare species of plants and animals, enjoy clean air, and admire breathtaking scenery. The reserve offers numerous opportunities for ecological tourism and relaxation in the heart of nature.



Fig. 3.6. Polissia Nature Reserve

[<https://wownature.in.ua/parky-i-zapovidnyky/poliskyy-pryrodnyy-zapovidnyk/>]

Each historical and cultural monument and natural-geographic site serves as a hallmark of the Zhytomyr region, each with its own unique history and cultural characteristics. Branding and promotion of these sites reveal the diversity and richness of the region's cultural heritage, making it an important part of both Ukrainian and global history.

Characteristics of Innovative Approaches to Historical and Cultural Branding. Historical and cultural branding is the process of creating and positioning historical and cultural heritage to attract attention, engage tourists, and support local community development [12]. The Zhytomyr region holds significant potential for innovative historical and cultural

branding. The innovative nature of branding is reflected in the following approaches:

1. *"Creative City"* and Cultural Capital of the Region. This approach envisions creating the image of Zhytomyr as a "creative city" through active development of cultural and artistic initiatives, organization of festivals, exhibitions, concerts, literary events, and more.

2. *"Book City."* Positioning Zhytomyr as a book city can become a key element of historical and cultural branding. The development of bookstores, literary cafés, and the organization of book fairs and forums will contribute to the growth of cultural tourism in the region.

3. Reviving *Cossack and Drevlyan Heritage*. Reviving and promoting the Cossack and Drevlyan heritage in the Zhytomyr region can make the region a historical "highlight." Zhytomyr has a deep-rooted history. The ancestors of modern Zhytomyr residents were the Drevlyans – a union of East Slavic tribes living between the Sluč (a tributary of the Horyn), the Prypiat, and the Teteriv rivers, with their center in Iskorosten (now Korosten). The Drevlyans were first mentioned in ancient chronicles and engaged in agriculture, cattle breeding, and various crafts (iron smelting, producing spindle whorls from Ovruch slate, and more). The very name "Drevlyans" indicates their close connection with woodcraft and woodworking.

4. Supporting Birthplaces of Prominent Historical Figures and Modern Celebrities. Establishing monuments, memorial museums, and initiatives that celebrate the

contributions of historical and contemporary personalities will highlight the multi-layered cultural heritage of the region. Zhytomyr is rich in cultural and historical figures who have brought fame to the region and Ukraine: writers Borys Ten, Oleh Olzhych, Maksym Rylsky, Volodymyr Korolenko, Sholem Aleichem, and Lesya Ukrainka; composer Borys Lyatoshynsky; pianist Sviatoslav Richter; contemporary singer Nina Matviyenko; and globally renowned "father of modern astronautics," engineer and inventor Serhiy Korolyov.

5. Creative Restoration and Development of Tourism Infrastructure. Building hotels, restaurants, recreation areas, and leisure facilities in historic districts supports the preservation and restoration of architectural heritage and creates comfortable conditions for tourists in the Zhytomyr region.

6. Cultural Intelligence (CQ) Technologies. Using modern technologies to preserve and popularize cultural heritage, such as virtual reality, augmented reality, and mobile applications for self-guided tours.

These innovative approaches enable the Zhytomyr region to establish a successful brand as an attractive tourist destination, preserve and enhance the value of its historical and cultural heritage, and support the development of the local economy.

Instruments of Historical and Cultural Branding.

Historical and cultural branding of the Zhytomyr region is implemented through various tools, including:

1. Marketing and Advertising. Developing and implementing marketing campaigns that emphasize the

uniqueness of the region's historical and cultural aspects. This includes websites, social media, promotional videos, brochures, posters, and more.

2. **Tourism and Hospitality.** Developing and supporting tourism infrastructure such as hotels, restaurants, travel agencies, tourist routes, and excursions, offering visitors a unique and memorable experience.

3. **Cultural Events and Festivals.** Organizing diverse cultural events, including music, art, and traditional festivals, literary gatherings, fairs, and other activities that attract attention and engage visitors.

4. **Interactive Technologies.** Using interactive technologies such as virtual reality, augmented reality, and mobile applications to create engaging experiences and increase visitor involvement.

5. **Educational Programs and Excursions.** Developing and conducting educational programs and excursions for schools, universities, and community organizations to promote the region's history and culture.

6. **Collaboration with Local Communities and Businesses.** Involving local communities and businesses in the creation and implementation of historical and cultural branding initiatives to foster community development and support the local economy.

7. **Partnerships and Sponsorship.** Establishing partnerships and attracting sponsors to finance and support historical and cultural projects and events in the region.

The combination of these tools helps create a strong and attractive image of the Zhytomyr region as a center of rich and multi-layered history and culture.

Among the most effective and innovative tools shaping the region's historical and cultural brand are **archetypal matrices**, which include the following elements [4]:

1. Artifacts:
 - Old churches, cathedrals, and castles, serving as symbols of the region's history and architecture.
 - Folk crafts and various handmade products reflecting traditional manufacturing methods.
 - Art installations and contemporary artworks that demonstrate an innovative approach to cultural heritage.
2. Spiritual Products:
 - Symbolic sites and shrines that attract believers and pilgrims from different parts of the world.
 - Religious festivals and traditions preserved and celebrated by the local population.
3. Fascinating Imagined Stories:
 - Legends and myths associated with historical sites and landmarks of the region.
 - Heroic tales and legends about notable figures originating from the Zhytomyr region.
4. Archetypes:
 - The Cossack tradition and heritage expressed in culture, music, dance, and military history.

- Peasant culture and rituals that illustrate the relationship between humans, nature, and rural life.

These instruments enable the creation of a unique image of the Zhytomyr region, attracting attention and encouraging visitors to explore and discover the richness of its history and culture.

3.2. Brand Identification and Visual Strategies

Characteristics of the Stages and Canons of Historical and Cultural Heritage Brand Identification. A brand is a unique identifier, symbol, or image that distinguishes a product, service, organization, or even an entire country from its competitors. It conveys a certain style, set of values, and perceptions, and is reliably associated with specific characteristics or qualities [7].

Cultural heritage can be seen as a brand because it serves as a unique identifier of a country or region. It reflects the entire combination of cultural, historical, architectural, and natural aspects that make this place distinct from others. Cultural heritage is a fundamental reservoir of traditions, art, and values that shape the collective identity of society [9].

Stages of Historical and Cultural Heritage Branding. Branding of historical and cultural heritage is a complex and long-term process that involves several key stages:

1. Analysis of Historical and Cultural Heritage. At this stage, a detailed analysis of the region's historical and cultural features is conducted. It is important to identify its value, uniqueness, and potential for brand development.

2. Development of a Branding Strategy. Based on the analysis, a branding strategy is formulated. This includes defining the goals, objectives, target audience, competitive advantages, and key directions for the brand's development.

3. Design of the Brand Concept. A unique brand concept is developed that reflects the core values, ideas, and promises of the brand to its future audiences – tourists, investors, and residents.

4. Creation of Brand Identity Elements. Brand identifiers such as a logo, slogan, corporate colors, and other visual components are created to represent the brand's identity. For instance, Zhytomyr has its own logo, which may be adapted depending on specific purposes or events (see Fig. 3.7).

5. Brand Communication and Promotion. Promotional campaigns and communication activities are implemented to raise awareness and reinforce the brand among the target audience.

6. Monitoring and Evaluation of Results. The effectiveness of the branding strategy is continuously monitored. Based on performance indicators, adjustments are made to improve the brand's impact and sustainability.



Fig. 3.7. Logo of the City of Zhytomyr
[<https://zt-rada.gov.ua/?pages=361>]

Canon-Based Principles in the Identification of a Historical and Cultural Brand. In the process of identifying a historical and cultural brand, certain branding canons or "Laws of Branding" are used [11]:

The Law of Originality. This is one of the most important aspects of branding. Having a unique concept or original idea allows a brand to stand out among others and attract the attention of the audience. It is crucial to find something in the region, city, or village that others do not have. This may include a unique historical building, structure, recipe, song, or even a person who contributed to the cultural development of the region.

The Law of Popularity. The formation and establishment of an attractive brand is achieved through the strategic dissemination of information about it in popular media. This increases awareness and interest among the target audience.

The Law of Spread. The appeal of a brand lies in its association with a particular type of cultural activity and in highlighting its distinctive features and uniqueness. This creates a unique image of the brand that resonates with the audience.

The Law of Brand Expansion. A brand should not be limited to a specific locality – it should have regional, national, and global appeal. This broadens the reach and influence of the brand.

The Law of Narrowing. A brand becomes stronger when it focuses on a specific segment that forms the core of its identity. This allows the brand to be positioned as an expert in a particular area and to attract a specialized audience. For example, the core of Zhytomyr's brand is the S. P. Korolov National Museum of Cosmonautics, as the region presents itself as a historical center of modern astronautics in Ukraine.

The Law of Advertising. To maintain brand popularity, it is essential to develop a branding advertising strategy. Effective advertising helps draw attention and sustain interest in the brand over a long period.

The Law of Authenticity. The key to a brand's success is its authenticity. This means the brand must stay true to its values and promises made to the audience. It is especially important that the brand lives up to the expectations of its consumers, which is why it must be genuine, truthful, and free of embellishment.

The Law of Time. Branding is a long-term process that requires consistent action. Achieving success means continually

improving the brand and adapting to the evolving needs of its target audience.

Essence of Historical and Cultural Heritage Brand Identification and Its Specifics in Zhytomyr Region. Brand identification is the process of determining a brand's unique characteristics and values [7]. It helps to answer key questions: what makes the brand unique, what values it conveys, who it is intended for, and how it differs from others.

The uniqueness of a brand is based on its distinct features that set it apart from competitors. Indicators of historical and cultural uniqueness may include [6]:

- History and cultural heritage.
- Architectural features.
- Presence of unique artifacts.
- Natural landscapes.
- Traditions and customs.

The brand identification process typically includes the following steps:

- Heritage object analysis: Studying the object's history, values, and unique characteristics.
- Target audience analysis: Understanding the needs, interests, and expectations of the audience.
- Determining competitive advantages: Identifying features that make the brand superior to others.
- Brand positioning: Formulating a clear and distinctive place for the brand in the market.

In the context of state-building and the consequent awakening of national consciousness, cultural heritage sites of Ukraine, which have absorbed the spirit of Ukrainian history, perform a significant social mission. They lay the groundwork for a comprehensive and unbiased understanding of the past of the Ukrainian people. Ukraine can justifiably be considered a country with a rich historical past, based on the number of heritage sites. As of now, over 130,000 monuments of archaeology, history, architecture, monumental art, and urban planning are officially registered. More than 12,000 objects are included in the State Register of Immovable Monuments of Ukraine. 6 objects are inscribed on the UNESCO World Heritage List, and 17 others are on the tentative list [3].

There is not a single oblast (region) in Ukraine that lacks cultural heritage on its territory. Depending on location, the heritage may be in better or worse condition and recognized, but each region has its own history and testimony preserved in physical form. Objects listed in the State Register of Immovable Monuments or taken under state protection in accordance with legislation are classified as cultural heritage monuments. These are recorded based on their historical, ethnological, archaeological, artistic, aesthetic, scientific, or cultural value, regardless of the form of ownership. Monuments are entered into the register at the national or local level.

Initiated in 2000 in accordance with the Law of Ukraine "On the Protection of Cultural Heritage" [1], the State Register

contained 12,044 entries as of January 1, 2022, including 907 of national significance and 11,137 of local significance.

The highest number of monuments included in the Register is in:

- Dnipropetrovsk oblast – 20% of all listed monuments,
- Autonomous Republic of Crimea – 12%,
- Odesa oblast – 11%,
- Kharkiv oblast – 10%,
- City of Kyiv – 11%.

As for the ratio of registered monuments to the total number of objects identified in each region, the highest ratios are observed in:

- City of Kyiv – 27%,
- Odesa oblast – 23%,
- Dnipropetrovsk oblast – 17% [2].

The UNESCO World Heritage Committee has recognized the following sites in Ukraine as cultural heritage (see Table 3.1):

Table 3.1
**UNESCO World Heritage in Ukraine: Inscribed Sites &
Tentative Nominations (with years) [3]**

№	Site Name	Year of Inscription
	INSCRIBED UNESCO WORLD HERITAGE SITES	
1	Kyiv – Saint Sophia Cathedral and Related Monastic Buildings, Kyiv-Pechersk Lavra	1990

2	Historic Centre of Lviv (Old Town ensemble)	1998
3	Residence of Bukovinian and Dalmatian Metropolitans, Chernivtsi	2011
4	Ancient and Primeval Beech Forests of the Carpathians and Other Regions of Europe	2007
5	Wooden Tserkvas of the Carpathian Region in Poland and Ukraine (transnational site)	2013
6	Struve Geodetic Arc (partially in Ukraine)	2005
7	Historic Centre of Odesa	2023
	TENTATIVE UNESCO NOMINATIONS	
1	Historic Centre of Chernihiv (9th–13th centuries)	1989
2	Cultural Landscape of the Canyon in Kamianets-Podilskyi	1989
3	Tomb of Taras Shevchenko and State Historical and Natural Museum-Reserve	1989
4	National Steppe Biosphere Reserve 'Askaniya-Nova'	1989
5	Dendrological Park 'Sofiyivka'	2000
6	Bakhchisaray Palace of the Crimean Khans	2003
7	Archaeological Site 'Stone Tomb' (Kam'yana Mohyla)	2006
8	Sudak Fortress Monuments	2012
9	Mykolaiv Astronomical Observatory	2007
10	Astronomical Observatories of Ukraine (Kyiv, Mykolaiv, Odesa, Crimea)	2008
11	St. Cyril's and St. Andrew's Churches (extension of St. Sophia nomination)	2009
12	Genoese Trade Posts and Fortifications from the Mediterranean to the Black Sea	2010

13	Cultural Landscape of Cave Cities of the Crimean Gothia	2010
14	Historic Environment of the Capital of the Crimean Khans in Bakhchisaray	2010
15	Derzhprom Building in Kharkiv	2010
16	Historic Centre of the Port City of Odesa (before inscription)	2009

A very important part of heritage, in addition to monuments, consists of the living expressions of intangible culture, collections of valuable artifacts, works of art, traditions, and more [5]. As for the cultural heritage sites of Ukraine included in the State Register, their number is constantly changing. Destroyed or lost sites are removed from the register, while new ones are added. The latter are entered into the register through a procedure defined by the Law of Ukraine “On the Protection of Cultural Heritage.” The owners of a heritage site (typically local authorities according to their jurisdiction) prepare a proposal for inclusion in the State Register and submit the required documentation to the Ministry of Culture and Information Policy of Ukraine. The respective Order on the inclusion of a site in the State Register of Immovable Monuments of Ukraine is issued based on the conclusions of the Expert Commission.

In practice, this process in Ukraine is lengthy and not always successful. Among the main reasons for the slow and ineffective replenishment of the Register are the overly complex

and time-consuming documentation procedures, as well as the weak human capacity of the local executive bodies responsible for cultural heritage protection, including those tasked with initiating proposals for the registration of cultural objects as state heritage sites [1].

Ukraine's cultural heritage, as a resource, is multidimensional: it serves as a source of inspiration and substance for cultural and social life; it can have a positive impact on the spatial development of regions; and it may also contribute to environmental conservation. Local heritage elements also possess economic potential, realized through their direct impact on entrepreneurship and business development in various sectors (tourism, hospitality, trade, culture), as well as through the multiplier effect.

Examples of heritage-based territorial identification in the Zhytomyr region are shown in Figures 3.8–3.11:

The city of Zhytomyr – the historical center of the Polissia region, a city rich in historical and cultural heritage. It is known for its cathedrals, museums, and parks. One of the city's key identifiers is the **Water Tower** (Fig. 3.8).



Fig. 3.8. Water tower

[<https://zhzh.com.ua/zhitomir/istoriia-cikavi-fakti-ta-sekrety-zhitomirskoi-vodonapirnoi-vezhi.html>]

Ancient Iskorosten, now the modern city of **Korosten**, was once the capital of the Drevlians. It is a city with a unique history and significant archaeological discoveries. It is identified by the "**Drevlianskyi**" **Park** and the **monument to Princess Olha**, located within the park (Fig. 3.9).



Fig. 3.9. "Drevlianskyi" Park, city of Korosten

[<https://discover.ua/locations/park-pamyatka-imostrovskogo-drevlyanskiy>]

The **Poliskyi National Nature Park** is a unique natural landscape featuring numerous lakes, forests, and wetlands. The park's identity, as recognized by tourists, is symbolized by its distinctive **system of lakes and marshes** (Fig. 3.10).



Fig. 3.10. System of Wetlands and Lakes of the Poliskyi National Nature Park

[<http://polesye-reserve.in.ua/head/plantes-bt.html>]

Trypillia Village is renowned for its artifacts from an ancient settlement. Trypillia represents one of the oldest civilizations in history. The area is identified by the *Trypillia Museum* and the famous artifacts of this ancient culture. The museum in Trypillia is primarily dedicated to the archaeological culture of the Trypillia civilization. The dark, constructivist, cube-shaped building is located on Posadova Hill, on the site of the ancient settlement of Trepol. Designed by architect Anatolii Ihnashchenko, the box-like structure symbolizes Ukraine's cultural wealth, while the surrounding stones represent the core of the land. (Fig. 3.11).



Fig. 3.11. Trypillia Museum

[<https://koam.com.ua>]

Thus, cultural heritage acts as a brand, serving as a unique identifier of a country or region. It reflects the entire spectrum of cultural, historical, architectural, and natural features that distinguish the area from others.

Information Support for the Promotion of the Historical and Cultural Brand and Brand Partnerships.

Brand promotion is a set of activities aimed at informing, persuading, influencing, building recognition, and reaching the target audience of a unique historical and cultural identifier of a specific territory [11]. In addition to communication strategies, the promotion of a historical and cultural brand includes the preservation and protection of cultural heritage, restoration and conservation efforts to safeguard these sites for future generations and harness them for tourism development. Active promotion is achieved through advertising campaigns and events designed to capture the attention of brand stakeholders.

It is also crucial to attract foreign investors and tour operators to support tourism development in Zhytomyr Oblast. The advancement of infrastructure related to historical and cultural landmarks is vital – establishing new museums, galleries, theatres, and other cultural institutions can draw new tourists. Simultaneously, improving hospitality and transport infrastructure is necessary to ensure the comfort of visitors. Public events promoting national culture and the preservation of traditions can also contribute significantly. Such initiatives offer brand consumers a unique experience and deepen their understanding of the region's culture and history.

Zhytomyr Oblast, as a region with a rich history and cultural heritage, holds great potential for territorial branding. However, the current state of informational support for brand promotion faces several challenges. One of the most significant issues is the insufficient use of modern digital tools. In an era of digital transformation, strong online presence – through websites, social media, and digital platforms – is essential. Yet many local communities either lack the resources or have not fully embraced these tools.

Another key challenge is the instability of information channels used for brand promotion. The lack of consistency and systematization in communication flows can disrupt brand perception and erode trust. Furthermore, the absence of a coordinated marketing strategy across communities in Zhytomyr Oblast leads to fragmented regional identity. Each community

may pursue its own vision for promotion, which can result in incoherent messaging for the overall regional brand.

Additionally, weak communication with media outlets and the public hampers branding efforts. Some communities are underrepresented in media or lack proactive engagement strategies.

To address these challenges, it is essential to enhance the use of digital tools, ensure stability and consistency in communication channels, align marketing strategies among communities, and strengthen engagement with media and the public. Only through solving these issues can the Zhytomyr region fully realize its branding potential.

Case Example: Promotion of the Berdychiv Historical and Cultural Brand

The *Berdychiv Synagogue*, a landmark of historical architecture, offers an opportunity to attract tourists and investors. However, limited digital presence and lack of visibility on the Internet and social media restrict awareness of this heritage asset. The absence of a dedicated website or active social media presence hinders promotion and brand development.

Moreover, information about the Berdychiv Synagogue is scattered across various sources, often unsystematized, which makes it harder to access and perceive as a coherent cultural brand. Another challenge is the limited awareness among the local population about the Synagogue's historical and cultural significance. Many residents see heritage as ordinary and fail to

appreciate its true value, which obstructs brand advocacy from within the community.

An additional problem is the lack of targeted marketing campaigns and public events promoting the Synagogue as a central heritage site of Jewish culture in Ukraine.

Effective branding of cultural heritage sites like the Berdychiv Synagogue requires a comprehensive information support strategy, including active use of digital tools, systematization of content, public education, and sustained marketing campaigns. Only then can this cultural asset achieve its full potential and attract attention from both local and international visitors.

A critical step in promoting the Berdychiv Synagogue brand is the creation of a centralized information platform and the implementation of a visitor data collection and analysis system. This platform could be a dedicated section on the city council's website or a standalone site/app where tourists can access schedules, leave feedback, and explore historical content. It may also serve as a guestbook or mobile app integrating data on all regional heritage sites, events, infrastructure, and tourism services.

Moreover, a visitor satisfaction tracking system – via surveys, electronic ticketing, or web analytics – will help tailor marketing strategies, promote the Berdychiv Synagogue and similar landmarks, and increase their attractiveness to visitors.

Brand Partnership as a Tool for Heritage Promotion.

Brand partnership is a powerful tool for developing the regional brand of Zhytomyr Oblast. First, it is important to engage all key stakeholders – local governments, businesses, civil society organizations, and residents – in the creation and support of the brand. These actors can contribute through funding, event organization, or communication efforts.

Partnerships with local businesses and communities are especially useful for developing infrastructure and services that enhance tourism. Support programs for small enterprises in tourism may include funding, marketing advice, and joint promotional campaigns.

In the context of the Berdychiv Synagogue, brand partnerships may involve:

- Cooperation with communities for restoration efforts,
- Engagement of businesses in organizing tours and selling souvenirs,
- Promotion of cultural products that reflect the city's heritage.
- Such initiatives stimulate local economic development, support entrepreneurship, and foster civic pride.

Promotional Tools for the Berdychiv Synagogue Brand:

Development of thematic tourist routes: Including the Synagogue and other significant historical or religious sites, such routes can provide a holistic view of the region's history.

Cultural events: Organizing festivals, exhibitions, and public lectures to highlight the historical value of the site and attract diverse audiences.

Guided tours: Offering professional tours about the Synagogue's history, architecture, and Jewish traditions.

Advertising campaigns: Creating brochures, videos, posters, and digital content for promotion via social media, websites, and travel platforms.

This comprehensive approach to information support and promotion will enhance interest in the cultural heritage and strengthen the overall brand of the region as a historical and cultural destination.

3.3. Events and Storytelling

Events as Innovative Tools for the Development and Promotion of Historical and Cultural Brands

In today's world, the level of competition in the market for goods and services is extremely high, compelling companies and regions alike to seek new and effective branding strategies. Events and cultural gatherings are increasingly recognized as innovative tools for building a positive image and promoting regional brands. Moreover, they serve as powerful instruments for identifying and promoting intangible cultural heritage, as well as for preserving and reviving traditions and societal values.

Events such as celebrations, festivals, concerts, conferences, and other public gatherings represent essential instruments for engaging with brand audiences. They create opportunities for direct contact, interaction, and dialogue, contributing to a positive perception of the brand and increasing its recognition. Events help forge emotional connections with audiences – an important factor in fostering brand loyalty and long-term support [10].

One of the key roles of events is their contribution to the preservation and promotion of intangible cultural heritage. These activities can play a critical role in revitalizing and showcasing traditions, customs, handicrafts, arts, and other elements of cultural identity. For example, the organization of thematic festivals, art exhibitions, folk craft workshops, and similar events helps to safeguard cultural traditions and ensure their transmission to future generations.

The primary functions of events in branding include:

Brand Formation and Consumer Engagement: Events offer a unique opportunity for the brand (e.g., a municipality or community) to establish direct interaction with its target audience. This helps build positive relationships and attract interest from residents and visitors alike.

Positive Brand Perception: Celebrations and festivals enhance the emotional perception of the brand. They create associations rooted in joy and community spirit, helping to form a favorable attitude toward the place and its cultural identity.

Increased Brand Recognition: Events play a vital role in enhancing brand visibility. They generate media buzz and public interest, thereby raising awareness and recognition of the brand across wider audiences.

In Zhytomyr Oblast, numerous cultural events serve as successful examples of aligning brand identity with the promotion of cultural heritage. For instance, *the Potato Pancake Festival ("Sviato Deruna") in Korosten* and *the Strawberry Festival in Vysoka Pich* contribute not only to the positive image of their respective towns and the region, but also to the support and promotion of local traditions, cuisine, folk arts, and crafts.

Examples of regional events in Zhytomyr Oblast

Potato Pancake Festival ("Sviato Deruna") in Korosten – one of the most vibrant and well-attended annual events (Fig. 3.12).

The Potato Pancake Festival ("Sviato Deruna") is celebrated as a significant part of local cultural heritage and traditions. Held annually, the festival is dedicated to honoring the *derun* – a traditional dish that has become a symbol of the region's cuisine and cultural identity.

The central element of the festival is the tasting of *deruny* prepared in various styles according to time-honored recipes passed down through generations. Visitors can enjoy the rich flavor and aroma of this beloved dish.

In addition to the tastings, the "Potato Pancake Festival" features a range of cultural activities and entertainment. These may include cooking workshops, exhibitions of local crafts, folk

festivities, concerts featuring local performers and folklore ensembles. The event provides an excellent opportunity for communication and cultural exchange between residents and visitors, while also supporting and promoting local cultural heritage.

The organization of the festival draws attention to the traditional cuisine and cultural values of the city of **Korosten**, enhancing its image and tourism potential.



**Fig. 3.12. Potato Pancake Festival ("Sviato Deruna")
in Korosten**

[<https://korosten-rada.gov.ua/istoriya-mizhnarodnogo-festivalyu-deruniv-u-korosteni-chastina-1/>]

The **Strawberry Festival ("Sviato Polunytsi")**, held in the village of **Vysoka Pich**, is another event aimed at preserving and honoring a vital part of the region's cultural heritage and traditions (Fig. 3.13).



Fig. 3.13. Strawberry Festival ("Sviato Polunytsi")

[<https://www.ukrinform.ua/rubric-yakisne-zhyttia/3268326-na-zitomirsinivlastuut-festival-polunici.html>]

The **Strawberry Festival ("Sviato Polunytsi")** in the village of **Vysoka Pich** is celebrated as a symbol of the richness and fertility of the local land, as well as the unique taste and aroma of strawberries. The main highlight of the festival is the strawberry fair, where local farmers and villagers sell fresh, sweet, and juicy berries harvested directly from nearby fields. This creates an opportunity for both residents and visitors to enjoy the finest local produce.

In addition to the fair, the Strawberry Festival features a wide range of entertainment and activities, such as open-air concerts with performances by local artists, folk celebrations, and exhibitions of arts and crafts. Culinary workshops on strawberry-based dishes are also held, allowing participants to explore their cooking skills using this flavorful ingredient.

The Strawberry Festival in Vysoka Pich is not only a time for enjoyment and relaxation but also an important occasion for communication and cultural exchange between locals and guests. Its organization supports the promotion of local cultural heritage and contributes to regional tourism development by drawing attention to the unique taste and charm of the village of Vysoka Pich.

The **Fish Soup Festival ("Sviato Rybnoi Yushky")** in the village of **Denishi** is another important event dedicated to celebrating and promoting the rich fishing culture and traditions of the local community (Fig. 3.14).

This festival is celebrated as a symbol of well-being and the fishing heritage of the village, as well to honor the unique taste and aroma of the traditional fish dish. The main event of the celebration is the preparation and tasting of fish soup (ukha), which is cooked during the local fish festival. Festival participants can enjoy this traditional dish made from the freshest fish, adding a special flavor and festive mood to the event.



Fig. 3.14. Fish Soup Festival ("Sviato Rybnoi Yushky")

[[Photographs by the authors]

In addition to the fish festival, the "Fish Soup Festival" in the village of Denyshi includes various entertainment and activities for participants. These may include fishing competitions, contests for the best fish soup, master classes on fishing and cooking, as well as performances by local artists and folk ensembles. The "Fish Soup Festival" in Denyshi is a wonderful opportunity for communication and exchange of experiences between residents and visitors. It supports and promotes local fishing culture and traditions while contributing to regional tourism development by drawing attention to the unique taste and atmosphere of Denyshi.

The **"Kupala Dew Festival"** in the town of **Andrushivka** is an important part of the region's cultural calendar and reflects the richness of Ukrainian traditions and rituals (Fig. 3.15).



**Fig. 3.15. "Kupala Dew Festival" in the town of
Andrushivka**

[<https://hromadske.radio/news/2018/07/07/do-sela-na-zhytomyrshchyni-na-svyato-kupalski-rosy-pryyihalo-50-000-gostey-foto>]

This celebration is held as a symbol of the rebirth of nature and community, and to honor ancient rites and customs. One of the central rituals of the "Kupala Dew Festival" is the lighting of the Kupala bonfire. This symbolic act represents the beginning of a new life and the driving away of evil spirits. Participants

gather, sing songs, dance around the fire, and perform various ritual actions such as jumping over flames or ceremonial bathing in a river or lake.

In addition to traditional rituals, the "Kupala Dew Festival" often features a variety of cultural events and entertainment, such as craft workshops, folk music and dance concerts, exhibitions of folk art, and fairs of handicrafts and traditional products. The "Kupala Dew Festival" in the town of Andrushivka is an important element of the region's cultural life, preserving and transmitting ancient traditions and values. It fosters community cohesion, supports and promotes national and cultural heritage, and contributes to tourism development by drawing attention to the unique rituals and traditions of the Ukrainian people.

The event **"Song Spas Festival" in the city of Zhytomyr** is an outstanding example of how cultural events can unite the local community and support the development of musical culture and traditions (Fig. 3.16).

This celebration is recognized as a significant day for musicians and musical ensembles, as well as a way to honor the city's musical heritage. The main highlight of the festival is a series of musical performances featuring both professional musicians and amateur groups and bands. These performers present a wide range of musical genres and styles, from classical to contemporary and folk compositions. This creates an opportunity for all city residents to enjoy the richness of musical culture and discover new creative directions.

In addition to musical performances, the "Song Spas Festival" may also include other cultural activities such as music and singing workshops, exhibitions of musical instruments and memorabilia, contests, and entertainment programs for both children and adults.



Fig. 3.16. "Song Spas Festival" in the city of Zhytomyr
[\[https://www.zhitomir.info/news_186236.html\]](https://www.zhitomir.info/news_186236.html)

The event "*Song Spas Festival*" in the city of Zhytomyr is an important occasion that fosters the development of musical culture and nurtures the creative abilities of local residents. It creates a unique atmosphere of interaction and cooperation between musicians and audiences and supports the preservation and promotion of Zhytomyr's musical heritage.

Thus, events are organized public and cultural gatherings that serve as effective platforms for engaging target audiences and conveying information about the historical and cultural landmarks of the area. Cultural and mass events are a specific type of event that focus on the cultural aspects of community life.

Advantages of using events and cultural mass gatherings for brand promotion [10]:

- **Direct contact with the target audience:** Events enable the brand to communicate directly with potential clients (brand recipients), learning about their needs and preferences.
- **Increased brand awareness:** Events help brands gain visibility and become more recognizable.
- **Creation of a positive brand image:** Events can help associate the brand with specific values and emotions.
- **Strengthened customer loyalty:** Events help establish closer connections with customers, increasing loyalty and making them “fall in love” with the brand.

Events and cultural mass gatherings can be used for:

- **Identification of intangible cultural heritage:** Events can help researchers and communities discover and document elements of intangible cultural heritage present in the event's location.
- **Promotion of intangible cultural heritage:** Events can raise public awareness, appreciation, and understanding of intangible cultural traditions and increase their perceived value.

Events and cultural mass gatherings are innovative tools for promoting historical and cultural branding and identifying

intangible heritage. They attract public attention, shape positive perceptions of the brand, and contribute to the preservation and dissemination of cultural heritage. Events become a meeting point of tradition and modernity, where everyone can feel part of the region's history and culture.

Branding of Intangible Cultural Heritage. Intangible cultural heritage comprises practices, ideas, messages, knowledge and skills – as well as instruments, objects, artefacts, and cultural spaces – associated with cultural traditions [8]. Intangible heritage is transmitted from generation to generation and is continuously recreated by communities and groups in response to their environment, the influence of nature, and their history. It provides a sense of identity and continuity, thus contributing to the promotion of cultural diversity and human creativity [12].

In Ukraine, intangible cultural heritage is manifested in the following domains:

- Oral expressions and traditions, including language as a vehicle of intangible cultural heritage.
- Performing arts.
- Knowledge and practices concerning nature and the universe.
- Rituals, customs, and festive events.
- Traditional craftsmanship (folk decorative and applied arts) [6].

The **National Inventory of Intangible Cultural Heritage of Ukraine** includes, among others, the following elements [8]:

- Opishnya ceramics.
- Bread culture (traditions and rituals related to bread).
- Krolevets woven towels.
- Petrykivka decorative painting.
- Kosiv painted ceramics.
- Cossack songs of the Dnipropetrovsk region.
- Ornek, the national Crimean Tatar ornament.
- The culture of preparing Ukrainian borscht.

Ukraine has also contributed the following elements to the **UNESCO Representative List of the Intangible Cultural Heritage of Humanity** [3]:

- Petrykivka decorative painting as a phenomenon of Ukrainian ornamental folk art (2013)
- Cossack songs of the Dnipropetrovsk region (2016)
- Tradition of Kosiv painted ceramics (2019)
- Ornek (Crimean Tatar ornament) [6].

The evolution of immovable heritage sites clearly reflects the development of human civilization and statehood. The cultural heritage of Zhytomyr region is an integral part of Ukraine's national culture. It embodies centuries of aesthetic perception, preserves deep artistic traditions, and reflects the cultural identity of Zhytomyr and the country. It also serves as a factor in the region's economic development. In the contemporary socio-cultural space, folk art in the region is

represented primarily by folk artists and craftsmen who pass on traditional culture to the younger generation.

The intangible cultural heritage of the Zhytomyr region is a holistic system of traditional cultural representations – a product of intellectual activity, social experience, and the spiritual practices of many generations.

The key forms of intangible cultural heritage in Zhytomyr region include:

- Oral traditions and expressions
- Languages and performing arts
- Customs, traditions, rituals, and festive events
- Nature and space, knowledge and practices of education and upbringing
- Folk decorative and applied arts (traditional craftsmanship)
- Other manifestations of intangible cultural heritage.

Recognizing the significance of the intangible cultural heritage of Zhytomyr as a key source of cultural diversity and a guarantee of sustainable development, the Ministry of Culture and Information Policy of Ukraine issued **Order No. 228 dated 6 July 2022**, which inscribed the **ritual dish tradition “Krupky” from the village of Mostove, Andrushivka district, Zhytomyr region into the State Inventory of Intangible Cultural Heritage of Ukraine**, under protection number 039.

"Krupky" is a ceremonial dish with a unique name known only to the residents of the village of Mostove, where 335 people aged between 10 and 101 continue the tradition of

preparing it [8]. The dish is at least 300 years old (see Fig. 3.17) and is believed to have pre-Christian origins.



Fig 3.17. Ritual Dish “Krupky”, Andrushivka, Zhytomyr Region

[<https://uccr.org.ua/news/tradytsiia-pryhotuvannia-obriadovoi-stravy-krupky-s-mostove-andrushivskoi-hromady-zhytomyrskoi-oblasti/>]

Initially a festive dish due to the high cost of its ingredients (eggs, chicken, and white flour), its preparation was traditionally accompanied by ritual songs – wedding songs, Green Week chants, Kupala songs, funeral and jubilee songs, as well as lyrical and thematic folk songs. This complex and labor-intensive dish requires not only skill but also patience and is transmitted from older to younger generations of women. It is not enough to know the recipe – one must observe and internalize the process. Due to the high complexity and effort

involved, *krupky* is now typically prepared during village festivals and ceremonial events. Many residents of Mostove retain at least basic or theoretical knowledge of how it is made, which makes the ritual a living part of the village's cultural identity.

One of the main bearers of this original cuisine and one of the active promoters of local rituals is the folk ensemble "*Zatyshok*", which operates under the Mostove Leisure Center (Fig. 3.18).

Between 2018 and 2022, local schools organized folklore classes introducing and teaching the art of preparing *krupky*. In addition, a new video was created, documenting an elderly housewife teaching the art of rolling *krupky* to the youngest son of the Ivanov-Pryzhuk family. The video was filmed by the Ivanov-Pryzhuk family.

On November 27, 2018, the Chamber of Commerce and Industry of Ukraine organized a meeting of the Expert Committee of the All-Ukrainian Public Competition under the program for the preservation and development of elements of intangible cultural heritage titled "*Living Tradition*." At this event, the ritual dish "*krupky*", recognized as an element of intangible cultural heritage, was included among the top 10 programs.



Fig. 3.18. Folk ensemble "Zatyshok", Andrushivka city
 [https://andrushivka.info/2024/12/20/барвіста-палітра-
 талантів-звіт-мистец/]

In 2019, a brochure dedicated to the element "Krupky" was published under the title *"Elements of Intangible Cultural Heritage – The Contemporary Domain of the Ritual Cuisine 'Krupky'"*. It was presented at the *All-Ukrainian Children's Creativity Festival "The Miracle of Playfulness"*, which took place on May 31, 2019 in Andrushivka.

The cultural space of modern society is undergoing significant changes in the process of globalization. Under its influence, languages are disappearing, traditions are changing, being forgotten, or lost; local cultures are weakening,

disappearing, or under threat of extinction. Ukraine's intangible cultural heritage is a unique phenomenon. The full development of traditional culture is influenced by many factors, including history, interaction with other countries, economic, geographical, and social conditions, as well as state cultural policy. At the same time, national culture represents an organic and holistic layer that incorporates the heritage of various ethnic groups through folklore, ethnography, and history, as well as the influence of other countries and diasporas. Preserving traditions is vital for the survival of a nation and a state. This is especially true for countries where traditions are a living reality that shapes each citizen's identity. Such heritage must be preserved, studied, developed, promoted, and used as a foundation of the state.

Intangible cultural heritage has a positive impact on social and economic development. There are several directions for developing intangible heritage as a resource, each of which enhances the investment attractiveness of local communities. The intangible cultural heritage of Zhytomyr region serves as a foundation for the development of creative industries, a source for gastrotourism, regional green tourism, festivals, and all other forms of cultural activity.

UNESCO plays a key role in preserving intangible cultural heritage. Across the globe, 104 organizations collaborate with UNESCO in the development of cultural tourism, supporting the creation of representative lists of tangible and intangible heritage. Currently, in Zhytomyr region, these resources are considered regional and local event

assets, but with proper promotion, it is expected that some festivals may grow into globally significant cultural events. At present, numerous folklore festivals are being held in Ukraine, including in Zhytomyr region. These festivals attract both domestic tourists and a relatively small number of international visitors. The resource base for ethnic festival tourism consists of existing festival infrastructure, organizers, tourists, and the natural, historical, and cultural potential of the country. At this stage, this base is substantial and requires effective utilization.

It is also crucial to provide unprecedented opportunities for the promotion of Ukrainian culture and the cultural and creative space both within Ukraine and abroad. This is a chance to increase the investment appeal of the country's regions and territorial communities while simultaneously showcasing Ukraine's unique culture to the world and integrating the country into the pan-European sociocultural space.

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Chapter 4

DIGITAL TRANSFORMATION IN HERITAGE GOVERNANCE

4.1. Digital Management of Historical and Cultural Heritage

In today's world of information technology, digital management of cultural heritage is becoming an increasingly relevant and essential component.

Digital tools make it possible to preserve, reproduce, research, and promote information about cultural values.

Digital management of historical and cultural heritage refers to the application of digital technologies and tools for the documentation, preservation, promotion, monitoring, and sustainable use of cultural and historical assets. In the context of regional development and branding, it plays a key role in increasing the visibility and accessibility of heritage objects, ensuring their protection, and involving communities in heritage preservation processes.

Key components of digital heritage management:

1. Digitalization and Documentation. Creating digital copies of tangible (monuments, artifacts, architecture) and intangible (oral traditions, rituals, crafts) heritage through 3D scanning, digital photography, GIS-mapping, video recording,

and databases. Example: digital archives of traditional songs or virtual tours of historic landmarks.

2. Online Access and Platforms. Development of online platforms and mobile applications that provide public access to cultural heritage objects, descriptions, and stories. This enables remote education, tourism, and citizen participation. Example: cultural heritage maps, open-access databases of museums and local traditions.

3. Virtual and Augmented Reality (VR/AR). Using immersive technologies to recreate lost or inaccessible heritage sites and to enhance the visitor experience through interactive storytelling. Example: AR-guided tours of historical buildings, VR-reconstructions of ancient settlements.

4. Heritage Monitoring and Risk Management
Application of digital sensors, satellite monitoring, and AI tools to assess the condition of heritage objects, track risks (e.g., natural decay, climate change, war), and support decision-making. Especially relevant for Ukraine's war-damaged heritage.

5. Community Engagement and Crowdsourcing.
Involving local communities in the collection of digital materials (photos, oral histories, crafts), as well as in decision-making through participatory digital tools. Example: open calls to share personal archives related to local cultural identity.

6. Smart Cultural Policy and Data-Driven Management.
Use of analytical tools and dashboards to evaluate the impact of

heritage initiatives, tourism flows, and cultural policies, enabling more informed strategic planning.

Advantages of digital cultural heritage management:

1. Preservation and accessibility: Digital technologies enable the preservation of historical and cultural heritage in virtual form, making it accessible to a wide audience of users.

2. Expanded research opportunities: Digital resources open new possibilities for the study and analysis of cultural heritage, contributing to the development of the tourism sector.

3. Virtual exhibitions: Digital museums and exhibitions allow the creation of virtual displays that can be accessed by anyone, regardless of geographical location.

4. Time and resource savings: Digital technologies automate many processes related to the management of historical and cultural heritage, leading to more efficient use of resources.

Digital cultural heritage management opens new opportunities for the preservation, research, and promotion of cultural values. It allows broader access to cultural heritage and helps ensure its preservation for future generations. However, along with the advantages, there are also challenges that require attention and resolution to fully realize the potential of digital heritage management.

Challenges of digital cultural heritage management:

1. Security and confidentiality: Storing cultural heritage in digital form raises concerns about unauthorized access and maintaining confidentiality.

2. Technological challenges: The rapid pace of technological development may cause issues with compatibility and long-term preservation of digital information.

3. Unequal access: Unequal access to information technology can create disparities in access to digital cultural heritage among different population groups.

Ukrainian context. In Ukraine, the digitalization of cultural heritage has become especially urgent during the conflict. Initiatives such as the *"Save Ukrainian Heritage"* platform, digital registries of damaged sites, and local digital storytelling projects (e.g., Polissia heritage mapping) are examples of resilience and innovation in cultural governance.

4.2. Digital Platforms, Heritage Mapping, and Open Archives

The integration of digital platforms into heritage governance has transformed how cultural heritage is documented, protected, and interpreted. Digital tools not only improve efficiency and accessibility but also strengthen community engagement and resilience in times of crisis. Recent global events, such as armed conflicts and environmental disasters, have highlighted the urgent need for robust digital strategies in heritage management [1].

Digital Platforms and Documentation. Digital platforms provide vital infrastructure for the documentation and conservation of cultural heritage. They enable systematic recording of tangible and intangible assets, facilitating access to high-quality information for researchers, policymakers, and the public. Examples include centralized databases for heritage objects, 3D scans of artifacts, and digital archives that consolidate materials from diverse institutions. During crises, such as wars or natural disasters, digital documentation can serve as an essential safeguard against loss or destruction [2].

Heritage Mapping and Community Involvement. Heritage mapping utilizes geographic information systems (GIS) and interactive platforms to visualize cultural landscapes and engage local communities in decision-making processes. Participatory mapping empowers citizens to identify and prioritize heritage sites, strengthening local identity and fostering collaborative stewardship [3]. Such approaches are critical for inclusive heritage planning and for adapting to challenges posed by rapid urbanization and environmental changes.

Open Archives and Intangible Heritage. Open archives democratize access to cultural heritage by providing digital repositories that include oral histories, rituals, traditional music, and crafts. These initiatives support the preservation of intangible cultural heritage, often marginalized in traditional conservation frameworks. Open archives also encourage

knowledge exchange between communities and scholars, promoting cultural continuity and innovation [4].

Mobile and On-Site Applications. Mobile applications and on-site digital tools, such as augmented reality (AR) and QR code systems, enhance visitors' experiences by providing interactive storytelling and real-time information. These technologies bridge the gap between physical and digital heritage, making sites more accessible and engaging for diverse audiences [5].

Challenges and Future Directions. Despite their advantages, digital platforms in heritage governance face significant challenges. Issues such as digital inequality, data privacy, long-term digital preservation, and ethical considerations regarding community representation require careful attention [6]. Future directions include developing adaptive governance models, integrating artificial intelligence for advanced analysis, and fostering international cooperation to ensure equitable and sustainable digital heritage practices [7].

4.3. Augmented Reality, Virtual Museums, and Interpretive Technologies

Augmented Reality (AR) has emerged as a revolutionary tool in heritage interpretation, offering immersive experiences that blend the physical and digital worlds. By overlaying digital information onto real-world environments, AR allows visitors to

engage more deeply with cultural sites, uncovering layers of history that might otherwise remain invisible. Through smartphones, tablets, and wearable devices, users can view reconstructions of historical events, visualize ancient structures, or access detailed narratives tied to specific artifacts.

Virtual Museums: New Spaces for Engagement. Virtual museums have become an essential strategy for expanding access to cultural heritage beyond physical constraints.



**Fig. 4.1. Digitally animated exhibit from the Horodnytsia
Porcelain Museum**
[Photographs by the authors]

These digital platforms offer interactive tours, 3D reconstructions, and online exhibitions, making it possible for global audiences to experience art and heritage collections remotely. Especially during crises such as the COVID-19 pandemic, virtual museums ensured continuous public engagement and education, democratizing cultural participation.

Interactive and Immersive Interpretive Technologies.

Interpretive technologies encompass a wide range of tools, including interactive displays, multimedia installations, and immersive audio-visual experiences.

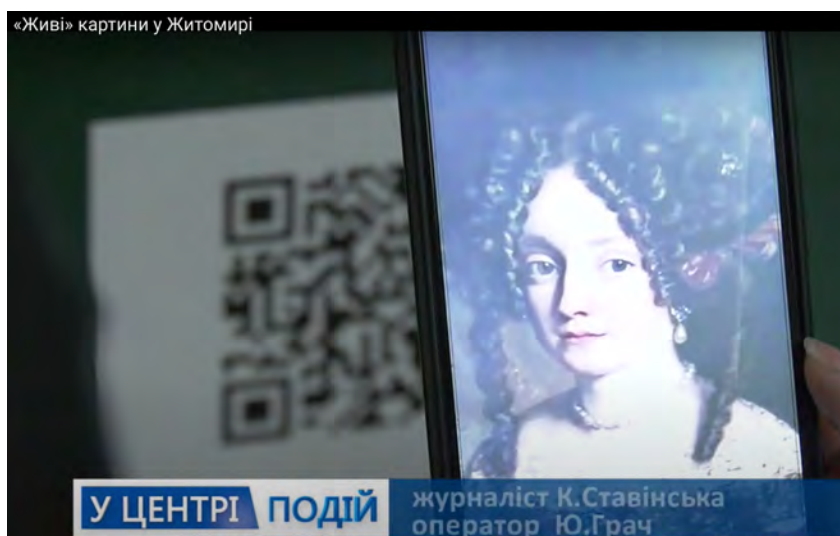


Fig. 4.2. Paintings brought to life with augmented reality in Zhytomyr

[<https://www.youtube.com/watch?app=desktop&v=RgUIB9Wja7U>]

By incorporating gamification elements, touchscreens, and sensory feedback, these technologies transform passive viewing into active exploration. Visitors can simulate archaeological digs, manipulate 3D models of artifacts, or participate in storytelling activities, deepening understanding and retention.

Challenges and Ethical Considerations. Despite their potential, these technologies also raise significant challenges and ethical concerns. Issues of digital accessibility, data privacy, and authenticity are critical to address. There is a risk of overshadowing physical heritage or prioritizing entertainment over education. Institutions must balance innovation with respect for cultural significance and inclusivity.

Future Perspectives and Policy Implications. Looking ahead, augmented reality and virtual technologies are expected to further transform heritage governance and presentation. Policymakers should develop frameworks that encourage technological integration while safeguarding cultural integrity. Collaboration among technologists, heritage professionals, and communities will be crucial for creating equitable and impactful digital heritage experiences. In addition, future policies should address issues of digital access, sustainability, and data ownership to ensure long-term benefits for all stakeholders. Continuous capacity-building and knowledge exchange will be essential to empower local institutions and ensure inclusive digital heritage strategies.

Chapter 4.4. Civic Engagement through E-Participation Tools

E-participation tools have become essential for enhancing civic engagement in heritage governance. These digital tools include online surveys, virtual public hearings, mobile applications, and social media campaigns. They allow communities to voice their opinions, contribute to decision-making processes, and collaborate with heritage authorities and organizations.

Digital Storytelling and Community Narratives. Digital storytelling has emerged as an innovative method to engage communities in heritage governance. By using videos, podcasts, blogs, and virtual exhibitions, communities can share their own narratives and perspectives on heritage sites and practices. This approach democratizes the interpretation of heritage and provides a platform for voices that are often marginalized in official histories. Community-driven storytelling helps foster a sense of ownership and responsibility toward local heritage. When people see their stories represented and valued, they become more likely to support conservation efforts and participate in heritage-related initiatives. Digital archives that compile community stories can also serve as valuable educational and cultural resources for future generations.

Transparency, Accountability, and Open Governance. Transparency and accountability are fundamental principles in

effective heritage governance. E-participation tools facilitate open governance by allowing citizens to track decisions, monitor projects, and provide feedback in real time. Online dashboards, open data portals, and publicly accessible project documents empower communities to hold authorities and stakeholders accountable for heritage protection.

In many cases, digital tools have been used to expose corruption and mismanagement in heritage projects. For example, public monitoring platforms have revealed the misuse of restoration funds or illegal alterations to protected sites. By providing transparency, these tools reinforce the legitimacy of heritage institutions and build public trust.

Challenges and Future Directions. Despite their advantages, e-participation tools also face significant challenges. Issues such as digital inequality, limited internet access in rural areas, and varying levels of digital literacy can hinder inclusive engagement. Moreover, the risk of misinformation and manipulation in online spaces requires careful moderation and the development of digital literacy programs.

Looking forward, the integration of artificial intelligence, blockchain technology, and advanced data analytics can further enhance e-participation. These technologies can automate feedback analysis; secure transactions related to heritage funding and provide more personalized participation experiences. To maximize their potential, future heritage governance strategies should focus on creating inclusive, user-

friendly, and culturally sensitive e-participation tools that encourage diverse voices and support active civic engagement.

4.5. Digital Promotion Tools

Digital Promotion Tools in Cultural Heritage Management. In the digital age, the promotion of cultural and historical heritage has moved far beyond traditional methods such as printed brochures or TV advertising. Today, a wide range of digital promotion tools empowers heritage institutions, local governments, and communities to engage wider audiences, attract tourists, and preserve local identity through dynamic, interactive, and cost-effective channels. These tools enable storytelling, community participation, and global outreach in ways never before possible.

1. Official Websites and Portals

Websites remain foundational tools in digital promotion. A well-designed official website can serve as a central information hub for a city, region, or heritage institution.

- Features include event calendars, virtual tours, educational resources, booking systems, and downloadable materials.
- Search engine optimization (SEO) ensures visibility in global searches.
- Multilingual support helps reach international audiences.

Example: A city's tourism portal featuring an interactive timeline of historical events, downloadable heritage trails, and an archive of cultural festivals.

2. Social Media Platforms

Social media is among the most impactful tools for raising awareness and building emotional connections with cultural heritage.

- Instagram & Facebook: Visual storytelling through photos, reels, livestreams, and event promotion.
- YouTube: Documentary-style videos, virtual tours, interviews with local historians or artisans.
- TikTok: Bite-sized, engaging heritage content targeted at younger audiences.
- X (formerly Twitter): Event announcements, heritage trivia, live updates during festivals.

Strength: These platforms allow real-time engagement, community building, and user-generated content (UGC), which further amplifies reach.

3. Email Marketing and Newsletters

Despite the rise of social media, email remains a highly effective channel for targeted communication.

- Regular newsletters can share updates on exhibitions, restoration projects, festivals, or educational workshops.
- Email automation tools allow segmentation of audiences (e.g., researchers, tourists, residents) and personalized content.

Best practice: Include visually rich content, embedded videos, and direct links to event registration or donation pages.

4. Digital Storytelling and Content Marketing

Digital storytelling brings heritage to life. Blogs, vlogs, podcasts, and thematic photo essays are excellent ways to create emotional narratives around cultural landmarks and traditions.

- Topics can include untold local legends, behind-the-scenes views of museum conservation work, or oral histories from community members.

- Combining visuals, text, sound, and interactive elements maximizes engagement.

Example: A blog series on forgotten crafts of a region paired with interviews and visual documentation.

5. Interactive Multimedia and Gamification

Interactive tools transform passive viewers into active participants. These include:

- Heritage-themed mobile games or scavenger hunts.
- AR apps that let users reconstruct ruins or monuments.
- Gamified quizzes or challenges related to local history.

Benefit: Such tools are especially effective for engaging school-aged visitors and families.

6. Influencer and Blogger Collaborations

Partnering with travel bloggers, local influencers, and cultural ambassadors can extend reach to new audiences.

- Influencers often generate content that feels authentic and trustworthy.

- Collaborations can include sponsored visits, joint livestreams, or guest blog posts.

Key tip: Choose partners whose values and audience align with the heritage site's mission.

7. Open Data and API Integration

Sharing digital cultural content through open data portals or APIs allows third-party developers and researchers to **reuse heritage materials** in apps, academic platforms, or creative projects.

- Encourages innovation and cross-sector collaboration.
- Contributes to the growth of digital ecosystems around cultural heritage.

Example: A museum providing access to digitized art collections and metadata for use in educational platforms or mobile guides.

8. Digital Advertising (Paid Promotion)

Paid campaigns on platforms like Google Ads, Facebook Ads, or Instagram Ads can **target specific demographics** or geographic regions.

- Effective for announcing major events or campaigns.
- Budget-friendly compared to traditional advertising, with measurable ROI.

Digital promotion tools are indispensable for modern heritage management. They bridge the gap between tradition and innovation, ensuring that cultural heritage is not only preserved but also made vibrant, visible, and valued in the digital age. For regions like Zhytomyr, embracing these tools offers a pathway to greater cultural recognition, sustainable tourism, and community empowerment.

Zhytomyr Case. Zhytomyr Region, with its rich history and culture, can effectively utilize Internet technologies to identify and promote its cultural and historical heritage.

Let us consider several tools that can help build a regional brand, raise awareness of cultural and historical landmarks, and contribute to tourism development in the region.

Corporate websites of territorial communities serve as important tools for promoting the region's cultural and historical heritage. These websites contain information about historical and cultural landmarks, tourist routes, cultural events and festivals, images of architectural monuments, descriptions of their history and features, as well as details about museums and cultural activities, which can attract tourists' attention.

Social media platforms such as Instagram, Facebook, and Twitter can be powerful tools for promoting the cultural and historical brand of Zhytomyr Region. A wide audience can be engaged through visual content, including images of historical landmarks, photos from regional festivals, and video tours. These platforms enable interaction with the audience through comments, likes, and shares, which helps raise awareness about the region's cultural heritage.

The official website of the city of Zhytomyr provides information about historical monuments, museums, events, and guided tours, as well as images and videos that draw attention to the region's cultural and historical brand.

Instagram account of the regional tourism agency: This account can regularly post photographs and videos of historical

sites in the region, along with announcements of upcoming events and festivals.

Facebook page of regional museums: The page can share information about museum exhibitions, lectures, and other cultural events that attract public interest.

Zhytomyr Region, with its rich history and culture, can employ various digital technologies to promote and popularize its cultural and historical heritage, including:

1. Interactive maps of historical sites – These allow users to discover and explore historical places on a map, access detailed information, and view related images and videos. For example, such a map may include markers with descriptions of cultural landmarks, museums, architectural gems, and more.

2. 3D technologies – Creating three-dimensional models of historical buildings and objects allows users to explore them in detail. These models can be used for virtual tours, enabling users to virtually walk through and examine each detail of a monument or structure.

3. Augmented Reality (AR) – AR technology enables digital enhancements of the physical world with additional objects and information. For instance, AR can offer reconstructions of ancient cities or monuments right at the location of the original sites.

4. Mobile applications – Developing mobile apps with information about the region's cultural heritage provides convenient access to this data even while traveling. The apps can

include maps of landmarks, audio guides, photographs, historical facts, and more.

5. Virtual Reality (VR) technologies – VR allows users to immerse themselves in historical environments and experience the atmosphere of past eras. It can be used to create virtual tours of historical sites and museums.

Digital technologies in the modern world offer vast opportunities for the promotion and popularization of cultural and historical heritage. Their effective integration can significantly boost interest in the region and attract more tourists. All the mentioned technologies open broad possibilities for promoting the cultural and historical heritage of Zhytomyr Region. The use of interactive maps, 3D technologies, AR, mobile apps, and VR makes it possible to engage both residents and visitors. Creating interactive and engaging digital exhibitions enhances the accessibility and convenience of experiencing the cultural brand of Zhytomyr Region. Digital technologies also enable the development of an informative regional interface that helps increase public interest and the popularity of local historical and cultural sites. Thus, digital technologies open new horizons for preserving, popularizing, and developing the cultural and historical heritage of Zhytomyr Region.

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PART 3.

STRATEGIC AND PROJECT-BASED APPROACHES TO HERITAGE SUSTAINABILITY AND ADVOCACY

Chapter 5

STRATEGIC HERITAGE GOVERNANCE AT THE COMMUNITY LEVEL

5.1. The Logic and Importance of Local Heritage Strategies

In today's world, where rapid and profound changes have become the norm, the preservation and effective management of cultural and historical heritage is not only a matter of safeguarding the past but also a strategic imperative for the future development of communities. This task goes beyond archives and monuments – it becomes a vital factor in shaping national identity and the sociocultural profile of society.

Developing an effective cultural heritage management strategy at the community level requires a comprehensive approach and active engagement of all stakeholders. This includes not only the research and preservation of heritage values but also the consideration of local population needs and opinions, civic participation, and partnerships with actors in the fields of culture, education, tourism, and community life.

It is essential to perceive cultural and historical heritage not merely as artifacts of the past, but as resources for sustainable development and strengthening community social capital. A local heritage management strategy should serve as a tool not only for preserving and restoring cultural values but also

for stimulating their use in creating new opportunities and fostering community development.

Territorial communities may include cultural heritage as a goal in their strategic documents:

- **At the level of specific heritage objects** – where operational objectives are defined for the restoration and renovation of cultural heritage sites.

- **At the level of individual projects** – such as establishing a municipal cultural center, creative hub, or educational center within a historical building or site.

- **At the level of tourism products** – combining the promotion of the community's cultural heritage with the development of tourist routes.

- **At the level of processes** – such as initiating restoration and modernization processes for architectural monuments, creating a digital registry of heritage objects, or integrating cultural heritage courses into educational curricula [1].

The development and implementation of a local heritage management strategy acts as a catalyst for community development and contributes to cultural diversity. Only through joint efforts and collaboration among all stakeholders can effective and sustainable management of cultural and historical heritage at the community level be ensured.

A local community's cultural heritage management strategy is a detailed action plan aimed at preserving, utilizing, and promoting the cultural, historical, and natural values tied to a specific territory.

Key drivers for the need of such a strategy include:

- Preservation of identity – Local heritage represents the community’s unique “genetic code,” shaping its identity. A strategy helps preserve this identity for future generations, transmitting core values and traditions.

- Economic development – Heritage can become a powerful driver of local economic growth, as tourism, crafts, and heritage-based cultural events can generate income and create jobs.

- Social cohesion – Joint efforts in heritage preservation foster unity, strengthen social ties, and enhance quality of life.

- Cultural development – The strategy supports the cultural life of the community, fostering creativity and innovation.

- Protection from degradation – Without a clear conservation strategy, heritage sites may deteriorate due to natural factors, human activity, or lack of proper care.

- Increased territorial attractiveness – Heritage makes the area unique and attractive for both tourists and investors.

The development of a cultural heritage management strategy for a territorial community is a complex process that involves systematic research, planning, and decision-making regarding the preservation, use, and promotion of cultural, historical, and natural assets specific to a given area. It is a strategic document that defines long-term goals and objectives for heritage preservation, integration into modern community life, and utilization as a resource for sustainable development.

The key steps in the development and implementation process include:

1. Analysis of the current situation.
2. Formation of a working group.
3. Setting goals and objectives.
4. Analysis of external and internal environments.
5. Development of strategic alternatives.
6. Action plan development.
7. Strategy implementation.
8. Public communication and engagement.

Core principles of local cultural heritage strategy development:

- Public participation – involving residents in all stages of strategy development and implementation.
- Comprehensive approach – considering cultural, economic, social, and environmental aspects.
- Sustainable development – focusing on long-term outcomes and preservation of heritage for future generations.
- Partnership – building cooperation with various stakeholders.

The development of a local heritage management strategy is a complex yet rewarding process requiring the involvement of a wide range of stakeholders and a systematic approach.

5.2. Methodological Approaches to Strategy Development

Developing a strategy for local heritage management requires a systemic approach that considers both general principles of strategic management and the specific characteristics of working with cultural and natural heritage. This section outlines the methodological foundations, development stages, and key implementation approaches.

To manage local heritage effectively, communities can apply various approaches, each offering advantages depending on the local context.

Systemic Approach. This approach views heritage as part of a larger system comprising:

- Socio-cultural environment (traditions, history).
- Economic factors (tourism, entrepreneurship).
- Environmental aspects (sustainable development, environmental impact).
- Governance structures (local self-government, partner organizations).

Example: Developing integrated policies that simultaneously address economic growth and protection of cultural sites.

Comprehensive (Integrated) Approach. This approach considers heritage in conjunction with sectors such as education, culture, economy, tourism, and ecology. Key principles include:

- Interconnection between heritage and other areas of public life.
- Using heritage as a driver for sustainable development.
- Broad stakeholder engagement.

Example: Successful integration of historical buildings into modern urban spaces (e.g., conversion of old factories into cultural centers in Lviv or Kyiv).

Sustainable Approach. Focused on preserving heritage for future generations with minimal negative impact on the environment and social structure. This involves:

- Use of ecological materials in restoration.
- Development of eco-tourism.
- Balance between heritage commercialization and protection.

Example: Preserving traditional rural environments through green tourism (e.g., the Carpathians, Polissia).

Participatory Approach. Encourages active community involvement in planning and implementing the strategy. Key components include:

- Open consultations and discussions.
- Volunteer programs.
- Joint initiatives of citizens and local authorities.

Example: Volunteer restoration initiatives such as “Frankivsk That Must Be Preserved” or campaigns by the Ukrainian Helsinki Group to protect historic buildings.

Methodology for Developing a Local Cultural Heritage Management Strategy:

Stage 1. Research and Heritage Assessment

The initial stage involves inventory and assessment of cultural and historical sites. This includes:

- Documenting the number, location, and condition of sites (architectural monuments, archaeological sites, museums, memorials, etc.)
- Analyzing historical background, cultural significance, and preservation levels
- Engineering inspections and diagnostics if needed.

This process results in a detailed heritage database, serving as the foundation for strategic decisions.

Stage 2. Establishing a Working Group

A multidisciplinary team is formed, comprising representatives of local authorities, NGOs, academia, business, and residents. Roles and responsibilities are clearly defined.

Stage 3. Defining Vision and Strategic Goals

This includes setting a clear overarching goal, defining specific, measurable, achievable, relevant, and time-bound (SMART) objectives, and identifying the steps to achieve them.

Strategic objectives typically include:

- Preserving heritage sites for future generations
- Leveraging heritage for community development
- Promoting heritage among residents and visitors
- Involving the public in heritage management

- Collaborating with stakeholders (government, business, academia).

Stage 4. Internal and External Environment Analysis

This involves assessing community resources (financial, human, material) and identifying external threats and opportunities. External factors include national policy, economic conditions, tourism trends; internal factors include existing programs, staff, and heritage-related assets.

Stage 5. Action Plan Development

- Brainstorming to generate ideas for heritage conservation and promotion
- Evaluating strategic alternatives by weighing pros and cons based on resources and risks
- Selecting the most suitable strategy aligned with community goals and capacity.

The action plan includes:

- Concrete initiatives and responsible parties
- A calendar schedule with deadlines
- Resource needs (budget, human and material resources)
- Funding sources (state, international, private)
- Effectiveness criteria (e.g., increased tourist flow, restored heritage objects).

Program examples:

- Restoration and conservation: Restoring architectural elements, engineering systems, etc.

- Cultural programming: Festivals, exhibitions, lectures on community traditions
 - Museum development: Permanent or temporary exhibits showcasing local history and culture.
- Cooperation with local stakeholders enhances effectiveness and resource efficiency.

Stage 6. Monitoring and Evaluation

Implementation must be accompanied by a robust monitoring and evaluation system to:

- Track progress
- Assess the effectiveness of activities (e.g., number of restored sites, increase in tourism, funding attracted)
- Adjust the strategy as needed based on changing conditions or new community priorities.

A flexible approach ensures long-term sustainability of local heritage management.

5.3. Practical Implementation of Community Strategies

The implementation of a local heritage management strategy requires a comprehensive approach that integrates organizational, financial, legal, and technological mechanisms.

This chapter elaborates on key aspects that determine the success and sustainability of strategy execution.

Financial Instruments and Resource Mobilization

One of the primary challenges in strategy implementation is the availability of financial resources. Given the limitations of local budgets, communities are encouraged to employ a diversified funding model, which may include:

- Public funding mechanisms, such as targeted programs from local authorities, national budget allocations (e.g., from the Ministry of Culture and Information Policy of Ukraine), and state subventions for regional development

- International grants and donor programs, including *Creative Europe* (supporting cultural initiatives), *UNESCO heritage grants*, and *EU cross-border cooperation programs* for regional development

- Public-private partnerships (PPP) and local entrepreneurship, which enable investment in heritage infrastructure in exchange for its use for tourism or social enterprise purposes (e.g., adaptive reuse of historic buildings as hotels or creative spaces)

- Crowdfunding and philanthropy, utilizing digital platforms such as *Spilnokosht*, *Kickstarter*, or *Patreon*, as well as fundraising campaigns via community organizations or diaspora networks.

Community Participation and Stakeholder Engagement

Active public participation is a cornerstone of democratic governance and a prerequisite for the effective implementation

of heritage strategies. Mechanisms for community engagement may include:

- Public consultations, such as town hall meetings, thematic seminars, and surveys that gather local perspectives and inform decision-making
- Working groups and forums, which involve community representatives in the design and monitoring of specific action areas
- Transparency tools, including dedicated online portals, open-access reports, and local heritage information centers.

Educational and creative initiatives also contribute significantly to community mobilization:

- Organizing lectures, workshops, and guided field visits on heritage topics
- Conducting creative competitions to generate community-led heritage narratives and projects.

Volunteering initiatives, such as heritage cleanup days or amateur documentation campaigns, strengthen local ownership and intergenerational transmission of cultural memory.

Awareness Raising and Cultural Communication

The long-term success of heritage strategies is closely linked to awareness-raising efforts. These may include:

- Information campaigns, use of social media and local media outlets to disseminate heritage-related content
- Community events such as *Heritage Days*, festivals, exhibitions, and thematic excursions

- Educational integration, including school programs, interactive lessons, and outdoor learning activities at historical sites.

Such initiatives contribute to the cultivation of civic responsibility and the formation of a heritage-conscious younger generation.

Local heritage management is defined not only by the preservation of the past but also by the creative use of heritage values to shape a unique identity and promote community development.

The development of a local heritage management strategy is a complex, multi-stage process that requires the integration of various methodological approaches. From analytical assessment to community engagement and the application of modern technologies, each step plays a critical role in using heritage effectively as a tool for community advancement.

Inventory and analysis enable the systematic study of a community's cultural and historical assets. This process lays the foundation for developing targeted programs focused on restoration, cultural activities, and the creation of museum exhibitions.

Program development and implementation encompass financing, resource mobilization, and impact evaluation. These efforts support the qualitative development of heritage and its integration into community life.

At the **partnership and cooperation stage**, it is essential to unite the efforts of civil society organizations, local

authorities, and businesses to achieve shared goals. Joint activities and knowledge exchange enhance the effectiveness and resilience of the strategy.

Community engagement in the final stage ensures that diverse perspectives and needs are considered. Public consultations, working groups, and educational initiatives foster a sense of ownership and responsibility among residents.

An **effective local heritage management strategy** – rooted in innovation, partnerships, and community participation – creates favorable conditions for the preservation of historical and cultural values, enhances the attractiveness of the community, and contributes to sustainable development.

The **practical implementation** of such a strategy requires a comprehensive approach that combines traditional methods with modern technologies, active citizen involvement, and sustainable financial mechanisms. When a community has a clear vision for the development of its heritage and applies innovative tools, it can not only preserve historical landmarks but also turn them into key assets for economic growth.

5.4. Public-Private Partnerships in Heritage Preservation

Public-private partnerships (PPPs) have become a strategic instrument for sustainable heritage preservation,

especially in contexts where public resources are limited and heritage sites face the risk of neglect or degradation. As a collaborative mechanism between government bodies and private sector actors, PPPs enable the pooling of financial, managerial, and technological resources to conserve, restore, and promote cultural heritage in ways that are both socially beneficial and economically viable.

Concept and Rationale. Public-private partnerships in the heritage field are formal arrangements that define the roles, responsibilities, and benefits of each party involved in the preservation or adaptive reuse of cultural assets. These partnerships often involve local or national government agencies, heritage institutions, non-profit organizations, and private investors or enterprises. The rationale behind such collaborations is grounded in mutual interest: while the public sector seeks to protect and enhance cultural heritage as a public good, the private sector is often motivated by the economic potential of heritage sites, particularly in tourism, real estate, and creative industries.

PPPs offer several advantages in heritage management:

- Access to additional funding sources, reducing reliance on public budgets
- Professional management practices from the private sector that improve operational efficiency
- Innovative approaches to interpretation, digitization, and audience engagement

- Economic revitalization, especially in urban areas through adaptive reuse of buildings.

Forms and Models of PPPs in Heritage Contexts.

Various models of PPPs have been applied in heritage preservation, ranging from long-term leases and concession agreements to co-financing schemes and joint ventures. Common examples include:

- **Conservation leases:** Government entities lease a heritage building to a private company under the condition that the company restores and maintains the property, possibly using it for commercial purposes (e.g., a hotel, restaurant, or event space).

- **Build-Operate-Transfer (BOT) models:** Private actors finance and rehabilitate a heritage site, operate it for a set period to recover their investment, and eventually transfer it back to public ownership.

- **Joint cultural development initiatives:** Partnerships that focus on revitalizing entire neighborhoods or districts with cultural and heritage value, combining preservation with economic development.

- **Social entrepreneurship models:** Heritage sites are restored and used for socially oriented businesses, such as community museums, artisan workshops, or educational centers.

Successful PPP models emphasize safeguards to ensure public interest and prevent the over-commercialization or commodification of heritage. This often includes strict

conservation standards, public access clauses, and performance monitoring by public heritage authorities.

Case Studies from Europe and Ukraine. In Western Europe, PPPs have played a critical role in preserving historic urban environments. For instance, in France, *the Mission du Patrimoine en P ril* collaborates with private sponsors to finance urgent restoration projects, while in Italy, public-private initiatives have supported the rehabilitation of abandoned rural buildings into cultural hubs and agritourism destinations.

In Ukraine, PPPs are still developing as a heritage management tool but have shown promising results. The revitalization of the *Potocki Palace in Tulchyn* demonstrates how regional authorities, private investors, and cultural NGOs can cooperate to transform a neglected heritage site into a venue for international festivals and community events. Another example includes the use of historical buildings in Lviv’s industrial zones, where former factories have been converted into creative industries centers through co-investment models.

Challenges and Risks. Despite their potential, PPPs in heritage preservation are not without challenges:

- **Balancing profitability and preservation:** Private investors may prioritize revenue generation over conservation goals unless appropriate regulatory frameworks are in place.
- **Limited institutional capacity:** Public authorities may lack the legal expertise or negotiation skills required to design and manage complex PPP contracts.

- **Public trust and transparency:** Involving private actors in managing cultural heritage can raise concerns over access, equity, and the erosion of cultural values.

To mitigate these risks, governments should establish:

- Clear legal frameworks that define heritage as a protected public asset
- Transparent bidding and selection procedures
- Monitoring mechanisms for quality control and public accountability
- Incentives such as tax benefits, grants, or branding advantages for socially responsible investors.

Policy Implications and Future Directions. The integration of PPPs into national and local heritage strategies requires a shift from seeing cultural heritage solely as a liability to recognizing its role as a catalyst for sustainable development. Policy frameworks should encourage innovative financing and management models while ensuring public stewardship and participatory governance.

International organizations such as *UNESCO*, *ICOMOS*, and the *Council of Europe* increasingly advocate for heritage-based PPPs that align with the principles of the *Historic Urban Landscape* (HUL) approach, promoting inclusivity, sustainability, and resilience.

In the post-conflict recovery and decentralization context of Ukraine, fostering public-private partnerships can be a powerful means of restoring cultural landmarks, generating employment, and strengthening local identity. However, this

will require institutional reforms, capacity building, and strong civic engagement to ensure that heritage remains a shared responsibility and benefit.

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Chapter 6

PROJECT EVALUATION IN THE FIELD OF CULTURAL HERITAGE: A TOOL FOR STRATEGIC MONITORING AND ALIGNMENT

6.1. The Role of Project-Based Initiatives in Cultural Heritage Strategy Implementation

Project-based initiatives serve as pivotal instruments for translating strategic objectives into tangible actions within the domain of cultural heritage. They allow public authorities, cultural institutions, and civil society actors to pilot, scale, and institutionalize innovative approaches to heritage conservation, interpretation, and valorization. In the context of strategic cultural heritage management, projects are not merely operational units but also dynamic mechanisms for testing policy assumptions, building capacities, and engaging communities.

The increasing reliance on project-based approaches in cultural heritage aligns with broader global trends in public administration and international development. Beginning in the late 20th century, the adoption of results-based management (RBM) and the influence of New Public Management emphasized efficiency, transparency, and accountability. Governments and donor organizations began to frame interventions as time-bound, outcome-oriented projects. Within

the cultural heritage sector, this translated into a growing preference for structured project cycles to address both urgent and systemic challenges, from post-disaster recovery to inclusive access and digital transformation.

By anchoring heritage policy in concrete interventions – ranging from the restoration of historic sites to the development of digital archives or community-based storytelling platforms – project-based initiatives bridge the gap between macro-level strategies and local realities. They provide a flexible framework to respond to emergent needs and allow for the iterative development of policy tools. These initiatives also facilitate the mobilization of financial resources from diverse sources, including public budgets, international donors, European programs, and private foundations, thereby enabling co-financing arrangements and pathways toward sustainability. The capacity to attract funding, particularly for under-resourced or at-risk heritage contexts, enhances the strategic leverage of project-based mechanisms.

In operational terms, heritage projects can be grouped into several categories based on their focus and function. **Conservation projects** typically involve technical restoration of monuments, architectural ensembles, or sacred landscapes. **Digitization and documentation projects** prioritize the safeguarding of knowledge and access through the creation of digital repositories, 3D scans, or open archives. **Education and outreach projects** foster public engagement through participatory heritage walks, school programs, and

mobile exhibitions. **Innovation-oriented projects** incorporate emerging technologies such as augmented reality, gamification, or blockchain for provenance tracking. For instance, the *Heritage Contact Zone* project (2018–2020), supported by the EU’s Creative Europe Program, promoted transnational dialogue through participatory storytelling in heritage sites marked by conflict or contested memory. In Ukraine, post-war civic-led initiatives – such as community restoration efforts in Kyiv’s Podil district and international collaborations supported by UNESCO – exemplify the integration of emergency conservation with public engagement and cultural resilience.

Beyond their role in implementation, project-based approaches fulfill strategic functions such as problem identification, piloting, and adaptive learning. Small-scale pilot projects enable policymakers and practitioners to test legal instruments, participatory models, and management frameworks prior to formal adoption or broader rollout. They serve as experimental spaces where innovative solutions can be trialed, evaluated, and either scaled or adapted. Feedback mechanisms embedded in project design contribute to a culture of reflection and evidence-informed decision-making, which in turn enhances the responsiveness and effectiveness of heritage strategies.

Moreover, project-based approaches provide a framework for **multi-level and multi-actor governance**. Strategic cultural heritage management increasingly demands coordination among national ministries, regional administrations, municipal

governments, professional associations, academic institutions, NGOs, and local communities. Projects often bring together these diverse stakeholders through steering committees, advisory panels, and participatory design processes. Such structures facilitate alignment of interests, ensure transparency, and strengthen legitimacy. For transnational projects, international consortia and networks play a key role in harmonizing methodologies, transferring know-how, and building intercultural competencies.

It is also important to recognize the contribution of cultural heritage projects to broader development agendas. Well-designed initiatives can advance multiple Sustainable Development Goals (SDGs), including SDG 11.4 on protecting cultural and natural heritage, SDG 8 on decent work through heritage-related training, and SDG 5 on gender equality through inclusive heritage programming. For example, community mapping projects that engage women and marginalized groups not only preserve intangible heritage but also empower new voices in decision-making. Similarly, green heritage infrastructure projects contribute to climate adaptation and resilience, particularly in historically vulnerable urban areas.

Despite their strengths, project-based approaches are not without limitations. A growing concern is the “**projectification**” of heritage governance, where long-term policy commitments are fragmented into isolated initiatives. This may lead to duplication of efforts, loss of institutional memory, or dependence on external funding cycles.

Additionally, donor-driven projects may impose priorities that do not fully align with local values or cultural specificities, leading to tensions or reduced impact. Addressing these risks requires embedding project outcomes into permanent institutional frameworks and aligning project goals with long-term strategic planning from the outset. Mechanisms such as institutional anchoring, post-project evaluation, and integration into legal instruments can mitigate these concerns.

Finally, projects are powerful vehicles for building trust and strengthening the social contract around heritage. By enabling inclusive participation, generating visible results, and fostering shared responsibility, they help transform cultural heritage from a passive object of preservation into an active agent of community resilience, identity, and innovation. In this sense, project-based initiatives are not only tools for strategic implementation, but also catalysts for democratic governance and cultural sustainability.

6.2. Evaluation Criteria for Cultural Heritage Projects

The evaluation of cultural heritage projects requires a multidimensional and context-sensitive approach, grounded in both international standards and local realities. Unlike conventional development or infrastructure projects, cultural

heritage initiatives often involve intangible values, symbolic meanings, and long-term social impacts that are not easily quantifiable. As such, standard evaluation frameworks must be carefully adapted to reflect the complexity of heritage assets, the diversity of stakeholders involved, and the dynamic relationship between cultural preservation and societal development.

In general, five core evaluation criteria are widely used in project assessment across sectors and are highly relevant to the cultural heritage domain:

- Relevance:** This criterion assesses the degree to which the project responds to clearly identified needs, gaps, or priorities in the cultural heritage sector. It examines alignment with national heritage policies, international conventions (such as the UNESCO 2003 Convention on Intangible Cultural Heritage), or local community aspirations. A relevant project should demonstrate both strategic coherence and contextual sensitivity.

- Effectiveness:** Effectiveness refers to the extent to which the project has achieved its stated objectives and delivered the expected results. In heritage projects, this may include outcomes such as improved conservation of a historic site, increased community engagement, enhanced documentation of traditions, or strengthened institutional capacity.

- Efficiency:** Efficiency relates to the relationship between inputs (resources, time, funding) and outputs (results). Evaluators consider whether resources were used in a cost-effective manner without compromising quality. In cultural

heritage, this also involves an assessment of project management, stakeholder coordination, and timeliness of implementation.

•**Sustainability:** Sustainability measures the likelihood that the benefits of the project will continue after its completion. This includes financial viability, institutional embedment (e.g. local authority ownership), and community support. For example, a heritage education program may be considered sustainable if it is integrated into local school curricula or maintained by a local organization.

•**Impact:** Impact considers the broader and longer-term changes generated by the project, whether intended or unintended. This may involve increased visibility of cultural practices, growth in heritage-related tourism, revitalization of local economies, or the strengthening of cultural identity. Evaluators also consider social, environmental, and policy-related impacts.

Beyond these core dimensions, cultural heritage evaluations often incorporate qualitative criteria specific to the nature and values of heritage:

•**Cultural significance and authenticity:** Projects should contribute to the safeguarding of the cultural significance of heritage assets and avoid compromising their authenticity. This involves respecting historical narratives, architectural integrity, and intangible values associated with places, practices, or expressions.

•Stakeholder engagement and participation:

Meaningful involvement of stakeholders – including heritage professionals, local authorities, community members, and cultural bearers – is essential for both the legitimacy and effectiveness of a project. Evaluation should assess the quality and depth of participation at different stages: planning, implementation, and monitoring.

•Innovation and transferability: Innovative approaches – such as the use of digital tools, new pedagogical methods, or interdisciplinary collaborations – can increase a project's relevance and reach. Transferability assesses whether methodologies or results can be replicated in other heritage contexts, contributing to broader systemic change.

These criteria are increasingly complemented by additional cross-cutting considerations in line with international policy frameworks and emerging trends:

•Equity and inclusion: Evaluations increasingly examine whether projects have actively engaged marginalized groups, such as women, youth, minorities, or indigenous communities. Inclusive approaches not only enhance fairness but also enrich the interpretation and transmission of heritage.

•Ethical sensitivity: Ethical evaluation involves respecting the rights, dignity, and perspectives of heritage-holding communities. It also includes transparency in decision-making, recognition of cultural ownership, and careful handling of sacred or contested sites and narratives.

•**Environmental responsibility:** Considering climate change and global sustainability goals, projects are increasingly expected to incorporate environmental considerations – whether through green building materials, climate-adaptive site management, or integration of ecological knowledge.

Evaluating cultural heritage projects also requires awareness of the limitations and tensions inherent in such work. For example, a project may achieve high visibility and short-term results but lack long-term sustainability. Conversely, a deeply participatory process may be less efficient but have greater cultural resonance. Moreover, heritage evaluations must often grapple with the challenge of valuing intangible outcomes, such as intergenerational knowledge transfer or the reestablishment of community pride – outcomes that may not be immediately observable but are nonetheless crucial to long-term impact.

To address these complexities, many evaluators adopt mixed methods approaches, combining quantitative indicators (e.g., number of restored artifacts, visitor counts) with qualitative methods such as interviews, storytelling, stakeholder workshops, and participatory self-assessment tools. Such approaches enable a more holistic understanding of value, change, and meaning in cultural heritage contexts.

In conclusion, the evaluation of cultural heritage projects is not merely a technical task but an interpretive and ethical process that must navigate between standardized frameworks and culturally specific realities. A well-designed evaluation not

only measures performance but also contributes to learning, accountability, and strategic alignment within the broader heritage governance system.

6.3. Tools and Methods for Evaluating Cultural Heritage Projects

A wide array of tools and methods can be employed to evaluate cultural heritage projects. The selection of appropriate instruments depends on multiple factors: the type and scope of the project, its primary objectives (e.g. conservation, education, digital innovation, or community development), and the stage of the evaluation – whether **ex-ante** (before the project begins), **mid-term** (during implementation), or **ex-post** (after completion). Furthermore, evaluations must balance the requirements for accountability with the need for learning and contextual reflection, especially when addressing intangible or community-based heritage.

1. Core Analytical Tools

Several core tools have become standard practice in heritage evaluation, particularly those adapted from broader development and public sector management:

- **Logical Framework Matrix (LFM):** This widely used results-based management tool structures the project's logic from activities through outputs to outcomes and impact, while

linking them to objectively verifiable indicators and key assumptions. In heritage projects, LFM may include indicators such as number of artifacts restored, percentage of local population engaged, or increase in site resilience.

- **Theory of Change (ToC):** Unlike the linear logic of LFM, ToC focuses on mapping out causal pathways, showing how project interventions are expected to lead to desired long-term changes. This tool is particularly valuable in heritage initiatives that involve behavior change, community empowerment, or identity restoration – areas where effects are indirect or emerge over time.

- **Key Performance Indicators (KPIs):** KPIs offer measurable criteria for tracking project progress. In cultural heritage, they may include the number of trained conservators, visitor satisfaction levels, online archive usage statistics, or increases in public funding for heritage.

- **SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats):** Commonly used during project planning and mid-term reviews, SWOT provides a strategic overview of internal and external factors that may influence the success of heritage projects, such as institutional capacity, political will, or local conflicts over heritage narratives.

- **Case Studies and Narrative Evaluation:** These qualitative tools allow for a nuanced understanding of complex and context-dependent impacts. Case studies may document processes of community healing through heritage revitalization or analyze

the symbolic role of restored monuments in post-conflict memory reconstruction.

- **Participatory Evaluation:** This approach actively involves beneficiaries and stakeholders – including residents, craftspeople, educators, and youth – in shaping evaluation questions, interpreting results, and validating findings. Participatory methods promote ownership, surface alternative perspectives, and often reveal deeper meanings attached to heritage that might be overlooked by external evaluators.

2. Emerging and Digital Evaluation Methods

With the increasing digitalization of heritage management and monitoring, several new tools and technologies are being integrated into evaluation practices:

- **Geographic Information Systems (GIS):** GIS supports spatial analysis of heritage sites and their condition, especially in archaeological, landscape, or urban heritage contexts. GIS-based mapping can track changes in land use, conservation zones, and threats over time.

- **Online surveys and mobile data collection:** These tools facilitate real-time feedback from project beneficiaries, visitors, or local communities. They are particularly useful in large-scale or geographically dispersed projects.

- **Dashboards and open-access monitoring platforms:** Many heritage organizations now use web-based dashboards to track key indicators, visualize trends, and share project progress with stakeholders and funders. These tools enhance transparency and responsiveness.

- **Photogrammetry and 3D scanning:** These technologies are not only used for conservation documentation but also serve as tools to evaluate physical restoration work or educational impact through digital interpretation.

- **Social media analytics:** Increasingly, heritage communication and engagement strategies are evaluated using analytics from social media platforms, capturing reach, sentiment, and interaction levels. This data can offer insights into how heritage messages are received and reshared by different demographics.

3. Mixed-Methods and Adaptive Evaluation Approaches

Given the complexity of cultural heritage work, many evaluations employ **mixed-methods** – combining quantitative indicators with qualitative insights. For example, a project aimed at revitalizing traditional crafts might use KPIs (e.g. number of apprentices trained) alongside life histories or visual storytelling to document knowledge transfer and intergenerational learning.

Another promising trend is **adaptive evaluation**, which focuses on learning and adjustment rather than only accountability. This approach is particularly useful for multi-year or pilot projects where initial assumptions may evolve. Regular reflection workshops, learning briefs, and iterative monitoring cycles allow project teams to adapt strategies in response to community feedback or emerging risks (e.g. climate change impacts or shifting policy contexts).

4. Ethical and Cultural Considerations in Tool Selection

Evaluators in the heritage field must also be attentive to **ethical implications** when selecting and applying tools. For example, participatory video may be empowering in one context but intrusive or inappropriate in another. Similarly, quantitative indicators alone may fail to capture power imbalances, cultural sensitivities, or contested narratives. Therefore, tools must be chosen not only for their technical reliability but also for their **cultural appropriateness** and ability to foster trust among stakeholders. In summary, the evaluation of cultural heritage projects increasingly requires a flexible, and inclusive toolkit. The combination of traditional planning frameworks, emerging digital tools, participatory approaches, and ethical sensitivity provides evaluators with the means to assess not only what a project delivers, but how and why it matters to those involved. Effective use of these methods contributes to better decision-making, improved project design, and ultimately to the long-term protection and vitality of cultural heritage.

6.4. Integrating Project Evaluation into Heritage Strategy Monitoring Systems

Integrating project evaluation into broader strategic monitoring systems is essential for enhancing **coherence**,

accountability, adaptability, and institutional learning within the field of cultural heritage management. When evaluation is embedded within the overall cycle of heritage strategy design, implementation, and review, it moves beyond isolated assessments and becomes a key mechanism for **evidence-based governance** and long-term policy refinement.

Rather than treating project evaluation as a post-factum control mechanism or donor requirement, a **systems-based approach** views evaluation as a dynamic tool for steering and adjusting cultural heritage strategies in real time. This integration helps to ensure that individual projects not only achieve their intended objectives but also generate valuable insights that inform broader planning and policy processes. It also enables heritage authorities to better understand systemic challenges, identify replicable models, and ensure the alignment of localized interventions with national and international frameworks.

1. Alignment with Strategic Frameworks and Indicators

A fundamental principle of integration is the alignment of project-level evaluations with the overarching vision, priorities, and performance indicators set out in national heritage strategies, local development plans, or international commitments (e.g. the UNESCO World Heritage Convention, the Sustainable Development Goals, or the European Heritage Strategy for the

21st Century). This ensures **vertical coherence** between operational activities and strategic goals.

For example, if a heritage strategy includes objectives related to community participation, intercultural dialogue, or digital transformation, project evaluations should be designed to measure relevant outputs and outcomes in those areas. Harmonizing indicators across projects and programs also facilitates aggregated reporting and comparative analysis, enabling decision-makers to assess progress at multiple levels.

2. Establishing Feedback Loops for Adaptive Management

Integrated systems rely on robust **feedback loops** that enable evaluation findings to inform strategic decisions in a timely manner. This includes the refinement of policy instruments, reallocation of resources, modification of project designs, or development of new initiatives based on lessons learned.

To operationalize feedback mechanisms, some heritage agencies conduct **annual strategic review meetings**, convene cross-departmental evaluation panels, or implement real-time monitoring dashboards. When evaluation findings are formally reviewed and linked to budgeting, planning, or policy cycles, they enhance the agility and responsiveness of heritage governance – particularly important in contexts affected by crisis, conflict, or climate-related risks.

3. Cross-Project Learning and Knowledge Management

One of the most powerful benefits of integrated evaluation is the ability to generate **cross-project learning**. By systematically analyzing results across a portfolio of projects – whether within a specific geographical area, thematic field (e.g. intangible heritage or youth engagement), or funding program – heritage authorities can identify best practices, innovative methodologies, and recurring bottlenecks.

This type of knowledge management supports the **institutional memory** of heritage organizations and contributes to the development of toolkits, policy briefs, or methodological guidelines. Comparative evaluation methods such as meta-evaluation, benchmarking, and synthesis studies are especially useful for drawing strategic insights from diverse experiences.

4. Institutionalization of Evaluation Functions

A key step toward sustainable integration is the **institutionalization of evaluation practices** within heritage governance structures. This involves the creation of dedicated evaluation units or focal points within heritage institutions, the adoption of formal evaluation policies or frameworks, and the integration of evaluation roles into job descriptions and performance systems.

Professionalization and capacity-building are also vital. Training staff in evaluation methods, engaging external evaluators with heritage expertise, and fostering communities of

practice around evaluation all help strengthen the institutional capacity to carry out meaningful and consistent assessments. Institutionalization ensures that evaluation is not dependent on individual projects or donor requirements but becomes a core function of strategic management.

5. Transparency, Public Reporting, and Stakeholder Engagement

Integrated evaluation systems also support **transparency, democratic accountability, and trust-building** among stakeholders. Public reporting of evaluation findings – whether through annual reports, open-access data platforms, or participatory forums – ensures that communities, funders, and other interested parties are informed about project results, challenges, and adaptations.

Some heritage institutions have adopted participatory monitoring approaches that involve local actors not only as beneficiaries but also as co-evaluators, further democratizing strategy monitoring. This practice aligns with the principles of the Faro Convention, which emphasizes the right of everyone to participate in cultural heritage governance.

6. Fostering a Learning-Oriented Culture

Ultimately, the integration of evaluation into strategic monitoring systems fosters a **culture of learning and reflection** within heritage institutions. It moves the focus from retrospective judgment toward forward-looking improvement. Such a culture values experimentation accepts failure as part of

innovation and encourages open dialogue across sectors and disciplines.

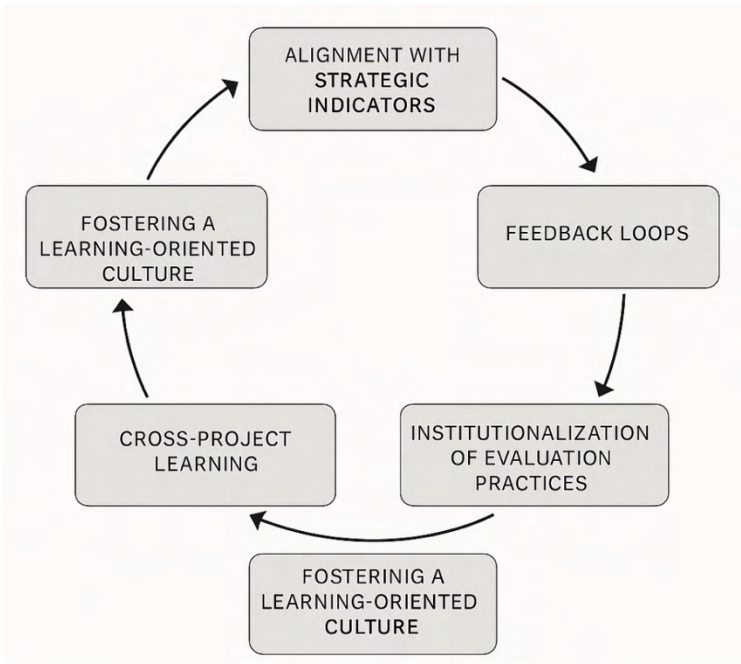


Fig. 6.1. Integrating Project Evaluation into Heritage Strategy Monitoring Systems: A Cyclical Model

Source: Author’s own elaboration based on [1-3].

An adaptive, evidence-informed heritage strategy is better equipped to respond to emerging challenges – from demographic shifts and migration to digital disruption and environmental change – while maintaining fidelity to its core mission: safeguarding heritage as a public good for present and future generations.

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Chapter 7

ADVOCACY AND POLICY DEVELOPMENT IN LOCAL HERITAGE GOVERNANCE

7.1. Policy Development in Ukraine's Management of Local Cultural Heritage

The **Constitution of Ukraine** is the fundamental legal document that defines the principles and norms for regulating the processes of managing and using cultural assets. **Article 54** of the Constitution clearly states that cultural heritage is protected by law and that the state guarantees the preservation of historical monuments and other objects of cultural value. This article also emphasizes the duty of every individual not to cause harm to nature or cultural heritage and to compensate for any damage inflicted.

The Constitution of Ukraine guarantees:

- Satisfaction of national cultural and linguistic needs of Ukrainians – including access to cultural assets, education in one's native language, and the preservation and development of Ukrainian culture.
- Support for the consolidation and development of the Ukrainian nation – promoting historical awareness, traditions, and culture, as well as the ethnic, cultural, linguistic, and religious identity of all indigenous peoples and national minorities of Ukraine.

- Preservation of historical monuments and other culturally valuable objects – through the implementation of measures to protect and safeguard cultural heritage and to return cultural assets located abroad.

Constitutional norms ensure the legal basis for free access to cultural assets, granting every citizen the right to visit museums, libraries, theaters, and other cultural institutions, as well as the right to the preservation and development of cultural heritage and the support of cultural diversity – including the recognition and protection of the ethnic, cultural, linguistic, and religious identities of all indigenous peoples and minorities [1].

The Constitution of Ukraine thus serves as a foundational document that guarantees access to cultural goods, protects cultural heritage, and promotes the development of Ukrainian culture. It highlights not only the protection but also the preservation of cultural heritage. Its provisions are primarily protective and restrictive, aimed at preventing harmful impacts on heritage rather than ensuring its rational and productive use [2].

In addition to the Constitution, a number of laws and regulatory acts govern the management and use of cultural assets. The **Law of Ukraine “On Culture”** defines the core principles of state policy in the cultural sphere, along with the rights and responsibilities of citizens, legal entities, and the state. According to Article 16, “*Preservation of Cultural Heritage, Cultural Values, and Cultural Assets*”, public authorities and local self-government bodies are obliged to ensure:

- The preservation of cultural values within Ukraine, the protection of cultural heritage, and the safeguarding of the historical environment.

- The protection of the *Museum Fund of Ukraine, State Library Fund, National Archival Fund, and National Film Collection*, and their replenishment with contemporary works of art, national publishing, cinematography, and audio production.

- The operation and development of a network of museums, archives, libraries, art schools, studios, cultural centers, cinemas, distribution enterprises, reserves, and restoration institutions in public and communal ownership.

- The preservation of intangible cultural heritage, including traditional folk culture, languages, dialects, folklore, customs, crafts, and historical toponyms [3, p. 1].

The **Law of Ukraine “On the Protection of Cultural Heritage”** establishes the legal foundations for the protection, preservation, use, and promotion of Ukraine's cultural heritage. It defines cultural heritage as the set of immovable and movable objects of historical, cultural, scientific, or artistic value [4].

This law regulates the activities of executive authorities, local governments, legal entities, and individuals in the cultural heritage sphere. Its key objectives are:

- To ensure the preservation of cultural heritage
- To prevent its destruction, damage, or disappearance
- To facilitate scientific research and public awareness.

The law stipulates procedures for identifying, recording, researching, restoring, conserving, and museumification of heritage objects, and it regulates their use and funding.

Important aspects include:

- The regulation of export, import, and restitution of cultural values
- The rights and obligations of heritage owners
- The liability for violations of heritage protection laws
- The creation of specialized bodies responsible for monitoring and enforcing compliance with legislation.

The Law “On the Protection of Cultural Heritage” is a cornerstone legal act ensuring the safeguarding of Ukraine’s national cultural heritage, which is an integral part of its historical memory and national identity. It promotes both preservation and enhancement of cultural assets, ensuring their responsible use for the benefit of society.

The **Resolution of the Cabinet of Ministers of Ukraine “On the Approval of the Rules for Granting Use of Cultural Heritage Objects”** outlines the procedures for transferring heritage assets to legal and physical persons for use [5]. It regulates the conditions and procedures for concluding contracts, including requirements for preservation, protection, and proper maintenance. The resolution also defines the obligations of users to maintain and use heritage sites in accordance with Ukrainian law, thus ensuring the conservation of their historical and cultural value.

A significant step toward addressing long-standing challenges in heritage protection was the adoption of the **Law of Ukraine “On Amendments to Certain Legislative Acts of Ukraine on the Protection of Cultural Heritage”** (No. 2518-VI, dated September 9, 2010). This law:

- Clarified issues related to the operation of historical and cultural reserves
- Strengthened legal liability for damage to heritage sites
- Regulated land law issues affecting heritage protection [6].

It is essential to emphasize that the use of cultural assets must consider their value and comply with all legal requirements. This approach is key to preserving Ukraine’s cultural heritage for future generations and ensuring its availability and accessibility to all.

A key role in the governance of local cultural heritage is played by the **Verkhovna Rada of Ukraine**, which performs the following functions: legislative support, financial provision, oversight of legal compliance, international cooperation, and awareness-raising activities. The Parliament develops and adopts laws regulating the preservation and use of cultural heritage at the local level, amends existing legislation to reflect the needs and challenges of local cultural heritage, approves the lists of cultural heritage sites of national importance and introduces amendments to the State Register of Immovable Monuments of Ukraine. It also establishes standards and rules for the protection and preservation of cultural heritage,

determines priorities for the allocation of resources to the most significant sites, and ensures alignment of Ukrainian legislation with international standards in the field of cultural heritage protection.

The **Cabinet of Ministers of Ukraine** exercises its functions in the preservation and management of cultural heritage through three main areas:

1. Implementation of state policy:

- Developing and approving strategies and programs (e.g., the *National Strategy for the Development of Cultural Heritage*, the *Program for the Preservation and Promotion of Cultural Heritage*).

- Establishing and coordinating the work of executive bodies (such as the *Ministry of Culture and Information Policy*, the *State Service of Ukraine for Ethnic Policy and Freedom of Conscience*, and the *National Commission of Ukraine for UNESCO*);

- Ensuring enforcement of legislation (e.g., supervising public institutions and proposing legal amendments).

2. Financing:

- Determining budget allocations (e.g., within the *State Program "Culture"*, regional development programs, and funding for restoration projects).

- Allocating funds through grants, subsidies, and financial support for cultural preservation and promotion projects.

3. International cooperation:

- Representing Ukraine in international organizations (*UNESCO, Council of Europe, World Intellectual Property Organization*);

- Implementing joint projects and facilitating international exchange of experience.

The Cabinet of Ministers is responsible for coordinating the activities of all executive authorities in the field of cultural heritage management and preservation.

The **Ministry of Culture and Information Policy of Ukraine** plays a central role in the development and safeguarding of the country's cultural sector. One of its core functions is the development and implementation of national cultural policy. The Ministry works in cooperation with other public bodies, civil society, and international partners to design and execute strategies and programs aimed at the development of the cultural and creative industries, the support of the arts, and the protection of national heritage. It oversees the restoration and protection of historical monuments, as well as the organization of cultural events and festivals.

Another major function of the Ministry is the regulation and normative support of cultural activities. It establishes standards and procedures in the cultural sector, monitors compliance with legal requirements, and provides methodological assistance to local authorities and civil society organizations. The Ministry is also responsible for the registration and licensing of cultural institutions and events, ensuring compliance with relevant legal and operational

standards. Overall, the Ministry's mission is to promote the development of cultural life in Ukraine, preserve national heritage, and support the rights and professional development of cultural practitioners.

The **State Service of Ukraine for Ethnic Policy and Freedom of Conscience** contribute significantly to the protection of the rights of national minorities and religious freedom. Its core tasks include the development and implementation of state policy on ethnic and cultural diversity, the promotion of interethnic harmony, and the regulation of interethnic relations. The agency also coordinates the efforts of public institutions and NGOs in the field of ethnic policy and works to implement international standards in this domain.

The **National Commission of Ukraine for UNESCO** oversees Ukraine's participation in UNESCO programs and projects. It ensures the fulfillment of Ukraine's international commitments to UNESCO and supports the preservation and promotion of the country's cultural heritage. The Commission develops national programs for the protection and restoration of World Heritage sites and facilitates dialogue with governmental agencies, civil society organizations, and international partners to promote cultural projects and elevate Ukraine's presence in global cultural networks.

An important role in the development and promotion of national culture is also played by the **Ukrainian Cultural Foundation (UCF)**, which supports diverse cultural initiatives and contributes to their integration into the global cultural space.

The UCF is a state institution established in 2017 in accordance with Ukrainian legislation, with the mission to promote the development of national culture and the arts [7]. The Foundation aims to foster the intellectual and spiritual potential of individuals and society and ensure wide public access to national cultural assets.

The Foundation's primary objectives include:

- Supporting cultural diversity
- Preserving national heritage
- Facilitating the integration of Ukrainian culture into the global cultural space.

The UCF provides financial support for culture and arts projects aligned with state strategic priorities, based on open competitive procedures to ensure transparency and fairness. It funds both large national initiatives and small local projects that contribute to cultural development at the community level.

The Foundation actively promotes the inclusion of various social groups in cultural life, including youth, national minorities, and persons with disabilities. It also supports innovative projects that foster new forms and methods of cultural expression and ensures the professional growth of artists and cultural workers through training programs and international exchanges.

One of the key functions of the UCF is to stimulate international cooperation and the exchange of cultural achievements. The Foundation facilitates the participation of Ukrainian artists in international festivals, exhibitions,

competitions, and residencies and organizes cultural events abroad to enhance the international reputation of Ukrainian culture.

Policy Formation for Local Heritage Management in Ukraine takes place across multiple levels, each playing a specific role in the planning, implementation, and oversight of policies and programs in the field of cultural heritage. The main levels involved in shaping local heritage management policy in Ukraine include the national, regional, local, civil society, and international levels (see Fig. 7.1).

Actors across these levels are interrelated and collaborate to ensure effective governance of local heritage, considering both overarching national interests and the specific needs and characteristics of local communities.

At the **national level**, the legal and regulatory framework for heritage policy is formed. This includes the adoption and refinement of laws and subordinate legal acts governing local heritage management, as well as the definition of general principles and strategic directions for the preservation and promotion of cultural heritage. The national level also encompasses:

- Allocation of state budget funds for the protection and promotion of heritage
- Development and implementation of state programs and projects in the field
- Preparation of methodological guidelines and manuals for local authorities and civil society organizations

- Coordination of scientific research and educational initiatives
- Supervision and coordination of executive bodies, local self-government, and civil society organizations involved in heritage management
- Oversight of Ukraine's international obligations in the cultural heritage sector.

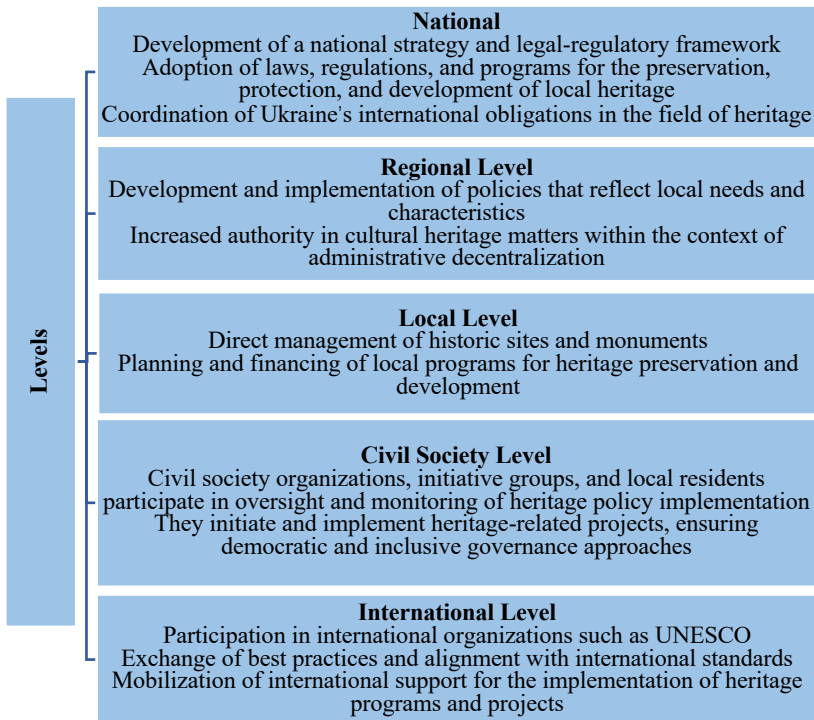


Fig. 7.1. Levels of Policy Formation for Local Cultural Heritage Management

Source: Author's compilation.

At the **regional level**, authorities are responsible for:

- Developing and implementing regional programs and projects aimed at the preservation and promotion of local heritage
- Adapting national policy to meet the needs and specificities of the region
- Allocating funds from regional and local budgets for heritage activities
- Monitoring compliance with legislation by local self-government bodies
- Conducting information and awareness-raising campaigns to increase public understanding of the value of local heritage.

At the **local level**, heritage policy is implemented through the development and execution of local programs and projects. This includes the direct management of local heritage sites, such as conducting restoration and repair works, and ensuring the protection and maintenance of monuments. The local level provides the greatest opportunity for public engagement in decision-making processes related to heritage governance. Within the broader context of administrative decentralization, both regional and local authorities are increasingly granted more autonomy in cultural heritage matters.

One of the pressing issues for Ukraine concerns cultural assets that have been removed and are now located in other countries. According to national legislation, “central executive bodies responsible for the development and implementation of

state policy in the field of export, import, and restitution of cultural assets, together with other executive authorities and local self-government bodies, within their respective competences, conduct a targeted policy aimed at the return of cultural assets that were illegally removed from the territory of Ukraine. They are also responsible for the protection of cultural property and heritage objects owned by Ukraine and located abroad” [3]. These matters, therefore, must be addressed collectively across all levels of public governance, in close coordination.

Local self-government bodies and local executive authorities, when developing and implementing socio-economic development programs for their respective territorial units, must consider the priorities of **national cultural policy** [3]. Moreover, **Article 142 of the Constitution of Ukraine** clearly defines the right of local communities to manage cultural heritage sites located within their territory. This right is based on the principle that the foundation of local self-government lies in the ownership and administration of property, including both movable and immovable assets, that belong to territorial communities [1]. As such, local communities have the right to own, use, and dispose of cultural heritage sites within their boundaries, determine their modes of use, set usage fees, and take measures to safeguard and protect these assets.

In addition, local communities may join efforts to co-manage cultural heritage through:

- pooling of communal property on a contractual basis

- joint financing and maintenance of communal enterprises and institutions

- and the creation of dedicated bodies and services for heritage governance.

Article 142 of the Constitution not only guarantees these rights but also outlines the responsibility of communities to actively participate in the preservation and governance of cultural heritage. This right is a key factor in the development of local self-government and the achievement of sustainable territorial development.

It is important to note that, beyond constitutional guarantees, local communities have access to a variety of tools and resources that can support their heritage governance efforts, including:

- National legislation on the protection of cultural heritage
- State and local development programs and strategies
- Financial support from the state and international organizations

- Expert assistance from cultural heritage professionals.

Utilizing these resources in combination with active community participation can ensure the preservation and promotion of local cultural heritage.

At present, however, there remains a lack of clarity and consistency in the distribution of powers in the field of heritage protection across different levels of government. Nevertheless, territorial communities are granted a certain degree of authority and resources to effectively manage cultural

heritage within their territories [8]. For heritage governance to be truly effective, each community must determine “what constitutes heritage” in its specific context, as some sites of national significance are subject to legal and procedural constraints.

At the same time, communities are empowered to:

- submit proposals to state authorities for the official recognition and classification of heritage sites
- establish local regulations governing the use of heritage assets.

Cultural heritage may thus become a priority tool for local development and can be integrated into strategic development documents of the community [8].

The current state of local heritage governance in Ukraine is complex and multifaceted. While some positive developments are evident – particularly due to the rise of civil society initiatives and support from state programs – there remain serious challenges that jeopardize the preservation and effective management of cultural heritage. The main shortcomings and challenges in local cultural heritage management in Ukraine are presented in Fig. 7.2.



Fig. 7.2. Shortcomings and Challenges in Local Heritage Management in Ukraine

Source: Author's compilation.

The challenges of managing local heritage in Ukraine can be conditionally divided into general problems and those that have become especially acute in the context of armed conflict.

General challenges and issues that require attention and resolution include:

1. Insufficient funding. Many cultural heritage sites require significant investment for preservation and restoration. However, budget allocations remain inadequate, resulting in

poor maintenance and delayed restoration of heritage monuments.

2. Low public awareness. Local communities often lack sufficient understanding of the significance and potential of cultural heritage, which leads to its underappreciation and negligent treatment.

3. Legal instability. Frequent changes in legislation and the lack of clarity in regulatory acts concerning the protection and use of cultural heritage complicate the work of management bodies and civil society organizations.

4. Lack of a comprehensive approach. Cultural heritage management is often fragmented, lacking a systematic strategy, which hinders the achievement of sustainable preservation and development.

5. Corruption and poor governance. A lack of transparency and openness in heritage management processes can contribute to corruption and the misuse of resources.

These problems require coordinated efforts and systemic action from public authorities, civil society, and the expert community to ensure more effective and sustainable cultural heritage governance in Ukraine.

At the same time, **cultural heritage management under martial law** in Ukraine faces distinct and acute challenges, including:

1. Risk of destruction of cultural heritage **sites**. Armed conflict poses a direct threat to historical monuments due to

military operations, neglect by warring parties, or the use of heritage sites for military purposes.

2. Violations of human and cultural rights. Martial law may limit access to cultural heritage for residents of conflict zones and lead to human rights violations such as the looting of museums or historical landmarks.

3. Financial constraints. Wartime conditions often result in reduced budget allocations for cultural programs and preservation projects, adversely affecting the state of heritage sites and their management.

4. Loss of historical knowledge and documentation. Military actions may destroy archives, museums, and other historical repositories, resulting in the loss of valuable knowledge and records.

5. Violations of international standards. Martial law may undermine international conventions and norms on cultural heritage protection, eroding trust and support from the international community.

Given these challenges, it is crucial to prioritize the protection and preservation of cultural heritage during armed conflict, develop targeted strategies for safeguarding heritage sites, and engage the international community in joint efforts.

In conclusion, the management of local heritage in Ukraine demands sustained attention and active support from civil society, experts, and cultural organizations. Without effective advocacy, preserving and developing cultural heritage

becomes an extremely difficult task, requiring significant financial, technical, and organizational resources.

7.2. Defining Advocacy within the Framework of Local Cultural Heritage Management

Despite the declarative support for cultural heritage protection, Ukraine continues to experience significant imbalances in this area. National authorities tend to focus on sites of national importance, while local heritage assets remain largely neglected. At the same time, local governments, constrained by financial limitations and a lack of qualified personnel, are often unable to implement effective strategies for the preservation and promotion of local heritage. The absence of clear operational mechanisms, along with limited engagement from both the public and private sectors, further complicates the situation. As a result, successful cases of local heritage preservation and development are more the exception than the rule, indicating serious shortcomings in the overall state policy in this domain.

Advocacy and policy development in the field of local heritage management play a critical role in preserving and enhancing cultural assets at the community level. It is important to recognize that local heritage not only reflects the cultural and historical identity of communities but also holds substantial

potential for economic development and tourism. Well-designed management policies can facilitate the protection of valuable historical sites, support the growth of cultural tourism, and stimulate the local economy.

Another key aspect is the importance of public participation and stakeholder engagement in decision-making processes related to heritage management. Advocacy by community groups and civil society organizations helps ensure that the interests and needs of local populations are considered in policy development. This contributes to the creation of more transparent, inclusive, and accountable governance mechanisms for cultural heritage that are responsive to diverse social groups and promote the sustainable use of heritage resources.

Thus, advocacy and policy development in the field of local heritage management are essential components of building sustainable and effective governance systems that not only preserve the values of the past but also shape a future grounded in cultural and historical identity.

Advocacy is a complex process of influencing policy, institutional practices, power dynamics, public perceptions, and social relations with the goal of positive transformation [9]. Often, solving heritage-related problems requires **multi-level advocacy** – at the local, national, and international levels – targeting diverse stakeholders including government institutions, businesses, civil society, international organizations, and donor agencies. The primary aim of advocacy is to empower citizens and local communities to build confidence in their capacities

and exercise their constitutional right to participate directly in decision-making processes [10]. In general, advocacy may pursue three overarching goals: policy change, systemic transformation, and democratic development [11]. Based on this, a logical framework for advocacy in local heritage management can be outlined (see Fig. 7.3).

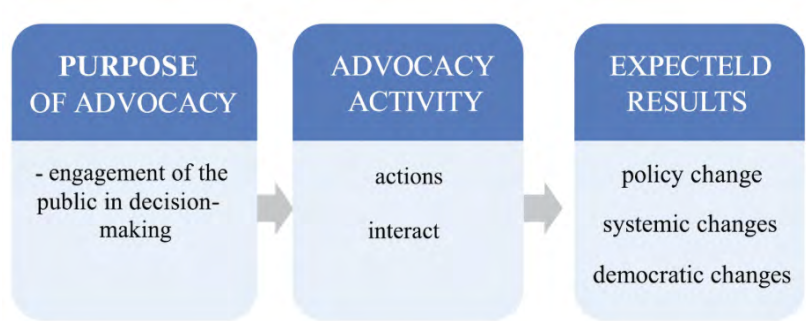


Fig. 7.3. Logic of advocacy activities

Source: Author's compilation.

Advocacy is the process of defending and promoting a specific idea, value, or group of interests. It is an active effort aimed at advancing viewpoints, solving problems, or achieving defined goals through public mobilization, lobbying, and other methods of influencing decision-making.

Advocacy shares certain features with lobbying, particularly in terms of influencing legislative processes, but they differ significantly in their goals and methods. Advocacy focuses on defending the interests of vulnerable populations,

such as low-income individuals, minorities, persons with disabilities, and others. Its primary goal is to promote justice and equal opportunities for all segments of society.

Lobbying, on the other hand, is typically used to promote the interests of specific influential groups, such as corporations, industries, or political parties. Its objectives may include increasing profits, securing benefits, or expanding powers for a particular group.

A key distinction lies in transparency and ethical foundations. Advocacy is always conducted openly and transparently. Its actions are grounded in evidence and ethical principles, and its methods include public campaigns, open dialogue, and collaboration with the media. In contrast, lobbying activities may be less transparent, involving behind-the-scenes influence on legislators, funding political campaigns, and using personal connections and public relations strategies.

Thus, advocacy can be viewed as an ethical and transparent tool aimed at protecting rights and promoting justice for all, while lobbying may be employed to advance the narrow interests of groups.

Advocacy can serve as a powerful tool for addressing societal problems, regardless of their scale or complexity. Its duration may range from a few hours to several years, depending on the depth of the issue, the decisiveness of decision-makers, and the strategies and instruments employed [10]. The flexibility and adaptability of advocacy make it an effective method for influencing various aspects of life – from local issues affecting

small communities to global challenges impacting millions. The duration of an advocacy campaign is determined by the complexity of the problem and the resources available. Some issues require immediate and decisive action, while others may demand long-term and persistent efforts. A crucial component of advocacy is the selection of appropriate strategies and tools. This choice depends on the specific problem, the target audience, and the available resources. Effective advocacy may include lobbying, public events, awareness campaigns, legal actions, community mobilization, and other methods. Regardless of its scale or duration, advocacy can lead to positive societal change when grounded in clear goals, careful planning, and persistent efforts.

In the context of cultural heritage governance, advocacy plays a key role in protecting, preserving, and promoting the values of cultural heritage. This involves active support for the conservation and use of historical sites, traditions, arts, and other elements of cultural heritage. Heritage advocates may campaign for the inclusion of heritage in political agendas, the development of supportive legislation, financial backing for heritage projects, and the creation of conditions that ensure community access to heritage. They may also promote the development of cultural tourism, education, and the responsible use of cultural resources to strengthen local identity and stimulate regional economic growth. Thus, advocacy in cultural heritage governance contributes not only to preservation but also

to the active utilization of cultural assets for the benefit of society.

In shaping cultural heritage policies at the community level, advocacy plays a critical role in ensuring the conservation, development, and use of cultural resources. Heritage advocates are tasked with defending the interests of cultural assets and contributing to the development of effective governance strategies.

First, advocacy campaigns help raise awareness among local populations and authorities about the importance of preserving and developing cultural heritage. They organize educational events and inform the public about the significance of heritage sites and the potential consequences of their loss or neglect.

Second, heritage advocates actively engage with local authorities, lobbying for the adoption of policies and programs aimed at preserving and promoting cultural heritage. They develop specific proposals, submit recommendations, and participate in public hearings and discussions to influence policy decisions.

Third, advocates build partnerships with other civil society organizations, businesses, academic institutions, and other stakeholders to collaborate on heritage governance issues. This facilitates the mobilization of diverse resources and expert capacity to implement joint projects and initiatives in the cultural heritage sector.

The process of advocating for local cultural heritage involves a series of key steps and strategies aimed at raising public awareness, drawing attention to issues related to the preservation and use of cultural heritage, and influencing decision-making in this field. The first stage involves an analysis of the current state of cultural heritage in the local context, identifying problems and opportunities. Based on this analysis, specific objectives and tasks of the advocacy campaign are formulated.

Subsequently, advocacy strategies and tactics are developed, including public events, lobbying efforts, media campaigns, and cooperation with other stakeholders. It is important to emphasize the value of local cultural heritage for community identity and development, as well as its economic, social, and cultural impact. A core element of the advocacy process is monitoring and evaluating the outcomes, which enables the assessment of the campaign's effectiveness and the adjustment of strategies according to changing needs and circumstances. This approach helps ensure the successful preservation and use of local cultural heritage in the public interest.

The advocacy process for local cultural heritage typically includes the following key stages:

1. **Situation Analysis.** The first step is a comprehensive assessment of the current condition of cultural heritage at the local level. This includes evaluating the state of preservation of

heritage sites, their significance for the community, existing challenges, and potential opportunities for further development.

2. **Setting Goals and Objectives.** Based on the situation analysis, specific goals and objectives for the advocacy campaign are formulated. These may include improving the protection of heritage sites, increasing public awareness, or creating new programs and initiatives in the field of cultural heritage.

3. **Strategy Development.** A strategy is then developed based on the established goals. It includes an action plan, selected methods and tools to be used in achieving the campaign's objectives.

4. **Implementation of Activities.** Once the strategy is finalized, targeted activities are carried out. These may include organizing public events, lobbying government authorities, running media campaigns, and other actions aimed at reaching the campaign's goals.

5. **Monitoring and Evaluation.** After the activities are implemented, their effectiveness and results are monitored and evaluated. This stage allows for the identification of successes, as well as any problems or shortcomings, and informs further refinement of the advocacy strategy.

In this way, advocacy plays a vital role in shaping cultural heritage governance policies within territorial communities. It fosters sustainable awareness and enables the effective use of cultural resources for the benefit of society.

7.3. Objects, Actors, and Methods of Advocacy for Local Cultural Heritage

Advocacy targets are those actors who are subject to legitimate influence – namely, representatives of state authorities or local self-government bodies endowed with decision-making powers and bearing responsibility for the outcomes of those decisions. Advocacy agents, in turn, are organized interest groups – associations that share common views on specific public issues and are established with the aim of advancing and protecting collective interests [12].

The main groups of tools used in advocacy campaigns include legal instruments, public diplomacy, public actions, methods provided for by the Law on Local Self-Government, work with mass media, and digital tools [13]. Among the most used advocacy methods are those typically classified as “defensive.” However, active, open, and proactive approaches to advocacy remain relatively rare and require further development.

When selecting appropriate advocacy methods for a particular campaign, it is essential to consider cultural traditions, local mentality, and the specific characteristics of the target audience [14].

The key advocacy methods and strategies that can be applied to improve the governance of local cultural heritage, as well as their respective features, are presented in Table 7.1.

Table 7.1
Advocacy Methods and Strategies in the Governance of
Local Cultural Heritage

Advocacy Method or Strategy	Description	Expected Outcome
Lobbying	Active engagement with policymakers, public officials, and other influential stakeholders	Influence over legislative changes, development and implementation of new programs, or revision of existing local heritage governance policies
Public Campaigns and Petitions	Organization of awareness-raising campaigns and submission of petitions	Drawing public attention to local heritage issues and increasing pressure on authorities to initiate change
Public Events and Educational Activities	Organization of lectures, seminars, exhibitions, and other public events	Raising public awareness about the importance of preserving and using local heritage, strengthening community cohesion, and enhancing transparency
Network and Partnership Building	Engaging other organizations, community groups, businesses, and local leaders in joint activities	Increasing the impact and effectiveness of advocacy efforts
Media Campaigns	Use of diverse media platforms, including social networks, television, radio, and newspapers	Dissemination of information on local heritage governance and drawing public attention to related issues

Advocacy Method or Strategy	Description	Expected Outcome
Expert Support	Involvement of heritage experts to provide consultation	Development of policy recommendations for decision-makers and public authorities

Source: Compiled by the authors.

Lobbying and Public Campaigns in Local Heritage Preservation. Lobbying is a targeted activity aimed at influencing policymakers, public officials, and other key decision-makers to promote outcomes favorable to specific interests. In the context of local heritage preservation, lobbying can serve as a powerful tool to influence legislation, program development, and policy reform.

For instance, lobbying may facilitate the adoption of new laws or amendments to existing ones to enhance the protection and conservation of local heritage. This includes legislation related to heritage conservation, heritage funding, spatial planning, and sustainable development.

Moreover, lobbying can stimulate the design and implementation of new programs, such as those supporting restoration efforts, educational initiatives, or research in the field of cultural heritage. It also enables the reform of existing policy frameworks – particularly those related to heritage identification, valuation, decision-making processes, and funding mechanisms – to ensure more effective and equitable heritage governance.

It is essential, however, that lobbying is conducted ethically and transparently. This means that all interactions and advocacy efforts must be open and honest, with all stakeholders being informed and given the opportunity to express their opinions. Though lobbying can be complex, it is an effective tool for safeguarding local heritage when based on clear objectives, thorough preparation, and strategic communication.

Public campaigns and petitions are also powerful instruments that raise awareness of the importance of local heritage and the challenges it faces. These tools mobilize public action and encourage greater civic participation in heritage governance. Petitions with substantial public support can pressure authorities to enact changes or take protective measures. By engaging citizens directly, campaigns and petitions foster transparency and accountability in heritage-related decision-making processes, while also promoting dialogue between the government and communities.

Public campaigns also build solidarity among individuals who share common values and seek to preserve their local heritage. This fosters a sense of collective responsibility and ownership over cultural resources. Such campaigns may also be used to defend community rights to heritage and to prevent the destruction or degradation of historically or culturally significant sites.

Examples of civic campaigns and petitions include:

- A campaign to save a historic building slated for demolition, involving petitions, media coverage, and public protests to influence government bodies and developers.
- A petition to preserve a green heritage zone under threat of urban development, submitted to local councils to highlight its value for both the community and the environment.

With active civic engagement and clearly defined goals, public campaigns and petitions can effectively contribute to the preservation of cultural assets for future generations.

Public events and educational activities further support these efforts by raising awareness, fostering community involvement, and garnering support for preservation projects.

These tools communicate the value and significance of local heritage, helping residents to understand and appreciate their cultural environment. Encouraging public participation nurtures a sense of responsibility and motivates community members to act.

Additionally, such activities can increase mobilized resources – such as funding, volunteer contributions, and partnerships – for heritage preservation.

Preserving and promoting local heritage also strengthens a community's cultural identity and sense of unity, particularly in areas affected by conflict, transition, or the erosion of traditions. Public events and educational efforts can take various forms, such as:

- Lectures and seminars featuring experts in history, architecture, and archaeology
- Exhibitions and festivals showcasing artifacts, photos, and archival documents related to local heritage
- Guided tours of historical landmarks and heritage sites
- Educational programs in schools focused on local heritage
- Awareness campaigns through media, social networks, and other communication channels.

These approaches help embed cultural heritage in the daily life of communities and reinforce its role in social cohesion and long-term development (see Fig. 7.4).

Public events and educational outreach represent essential components of a comprehensive strategy for local heritage preservation. Through active community engagement and well-designed educational programs, these tools help safeguard cultural assets and foster supportive conditions for their protection.

Lectures and Seminars	Inviting experts from history, architecture, archaeology, and other fields to give lectures and seminars on heritage-related topics.
Exhibitions	Organizing exhibitions showcasing artifacts, artifacts, photographs, and other heritage-related materials.
Festivals	Hosting festivals that include demonstrations of traditional crafts, historical sites.
Tours and Excursions	Organizing heritage-related excursions and tours of historical sites.
Information Campaigns	Developing and implementing educational programs for schools to teach students about their local heritage.

Fig. 7.4. Examples of Public Events and Educational Activities in the Field of Local Cultural Heritage Protection

Source: Compiled by the authors.

One key instrument in this context is "**Building Networks and Partnerships**", which contributes to heritage advocacy through:

- **Enhancing impact:** Collaborating with other organizations, community groups, businesses, and local leaders strengthens the influence of advocacy efforts aimed at preserving local heritage. This joint action enables the mobilization of broader public support, resources, and participation.

- **Increasing efficiency:** Partnering with diverse stakeholders boosts the efficiency of advocacy work by combining different areas of expertise, resources, and strategic knowledge to achieve better outcomes.

- **Expanding opportunities:** Network-building opens access to new opportunities and resources that may not be available to individual actors – such as funding mechanisms, expert consultations, privileged access to data, and influential networks.

- **Fostering knowledge exchange and learning:** Cooperation within networks facilitates the sharing of knowledge and experience among different stakeholders. This contributes to mutual learning, the development of best practices, and the adoption of innovative approaches to heritage preservation.

- **Supporting diversity and inclusion:** Engaging with a wide range of organizations and community groups ensures a more inclusive and representative approach to heritage

governance, where multiple perspectives and community needs are acknowledged in decision-making processes.

Concrete examples of networking and partnership practices are presented in Fig. 7.5.

Examples	Description
Coalition Building	Uniting various organizations and groups to form a coalition dedicated to advocating for local heritage preservation
Network Participation	Joining existing networks and associations related to heritage preservaryon at nationaal or international levels
Collaboration with Local Leaders	Collaborating with local leaders to support preservation efforts and promote local heritage as a tourism
Partnership with Educational Institutions	Working with educational institutions to develop educational programs, and research projects related to local heritage

Fig. 7.5. Examples of Networking and Partnerships in Local Cultural Heritage Preservation

Source: Compiled by the authors.

The creation of networks and partnerships is a vital component of an effective strategy for preserving local heritage. Collaborative efforts involving various stakeholders enhance the impact, efficiency, and sustainability of advocacy initiatives in this field.

Media campaigns play a crucial role by utilizing diverse media platforms – including social networks, television, radio, and print media – to disseminate information about cultural heritage management issues and to engage public attention and support. Equally important is expert support, which involves engaging cultural heritage professionals to provide advice and formulate recommendations for policymakers and public officials.

These methods and strategies can be used independently or in combination to achieve improvements in local heritage governance. Strategic partnerships across sectors (e.g., between municipalities, NGOs, cultural institutions, and academia) facilitate knowledge exchange, resource mobilization, and the scaling of best practices in heritage protection.

7.4. Public and Institutional Engagement in Policymaking

Ensuring democratic legitimacy, effectiveness, and transparency in decision-making at all levels of governance requires the meaningful inclusion of the public in these processes. First, the public holds a direct interest in many matters that affect their lives, communities, and surrounding environment. Involving citizens in decision-making allows for a broader consideration of diverse perspectives, needs, and

interests, contributing to more informed and justified decisions. Second, public participation enhances the legitimacy and social acceptance of adopted decisions. When people are granted opportunities to contribute to policy processes, they feel more engaged in shaping their communities and become more likely to support the outcomes. Moreover, the involvement of a wide array of stakeholders helps identify and integrate different viewpoints, contributing to more responsible governance.

In the context of cultural heritage, public participation is critically important for the effective preservation and use of heritage assets. Cultural heritage is not only a legacy of the past but also a vital component of identity, belonging, and social cohesion. Involving the public in decision-making ensures that the community's interests, values, and needs are reflected in heritage preservation strategies and policies. Furthermore, communities possess invaluable local knowledge, experiences, and resources that can contribute significantly to improving heritage management. A diversity of stakeholders enriches project design and implementation with innovative ideas, alternative approaches, and practical expertise.

Active participation also enhances accountability and local ownership, helping to build effective and sustainable strategies for managing cultural heritage. Citizen engagement in this area is not merely a normative requirement of democratic governance, but also a strategic imperative for building an inclusive, transparent, and resilient society. Public involvement fosters trust between citizens and authorities, supports open and

participatory governance structures, and contributes to long-term sustainable development.

Mechanisms for public engagement in cultural heritage governance encompass a range of tools and practices aimed at fostering community involvement in both decision-making and project implementation. These include public hearings, consultations, working groups with community representatives, heritage advisory councils and committees, and the development of cooperation programs between local authorities and civil society. In addition, information and educational campaigns are essential tools for raising awareness of the value and importance of heritage preservation.

Such mechanisms not only encourage citizen participation but also reinforce democratic principles and improve the quality of governance in the heritage sector. Table 7.2 provides an overview of key mechanisms for public participation in the management of local cultural heritage.

Table 7.2
Mechanisms of Public Involvement in Local Cultural Heritage Governance

Mechanism	Description
Public Hearings and Consultations	Organized meetings where citizens can express opinions on heritage-related policies and projects before decisions are made.
Community Advisory Councils and Committees	Permanent or temporary bodies composed of representatives of local communities, NGOs,

Mechanism	Description
	and experts who provide recommendations on heritage issues.
Working Groups and Stakeholder Panels	Collaborative forums that bring together public officials, activists, and professionals to co-design policies and monitor their implementation.
Participatory Budgeting Initiatives	Mechanisms through which residents can propose and vote on heritage-related projects funded by local budgets.
Online Platforms and Digital Feedback Tools	Web-based platforms that allow community members to provide input, comment on drafts, or report issues concerning local heritage sites.
Educational and Awareness Campaigns	Outreach activities aimed at raising public understanding of the value of heritage and the importance of community engagement in its preservation.
Civic Volunteering and Local Heritage Events	Community-led actions such as heritage clean-up days, guided tours, or cultural festivals that encourage local involvement and foster a sense of ownership.
Co-management and Partnership Models	Institutionalized forms of cooperation where local authorities and civil society organizations jointly manage heritage sites or implement projects.
Feedback and Reporting Mechanisms	Tools for monitoring heritage governance performance, including surveys, complaint hotlines, and public reports with community input on project outcomes.

Source: author's elaboration.

In addition to the above, public involvement in cultural heritage governance can be fostered through the organization of open dialogues and consultations with community representatives, the development of digital platforms for idea exchange, and the active participation of civil society organizations, local activists, and experts in the design and implementation of heritage conservation and development projects. These mechanisms ensure greater citizen engagement in decision-making and implementation processes related to their cultural heritage.

Equally important is the establishment of reporting mechanisms that allow public authorities responsible for cultural heritage to provide feedback to the community, take citizens' opinions and suggestions into account, and adapt policies accordingly. The widespread use of such participatory tools enhances transparency and accountability in governance, strengthens community ownership, and increases the overall effectiveness of heritage preservation and development efforts.

The development and implementation of monitoring and evaluation mechanisms for cultural heritage governance policy in a territorial community involves several key steps that facilitate the systematic measurement and analysis of outcomes (see Figure 7.6).

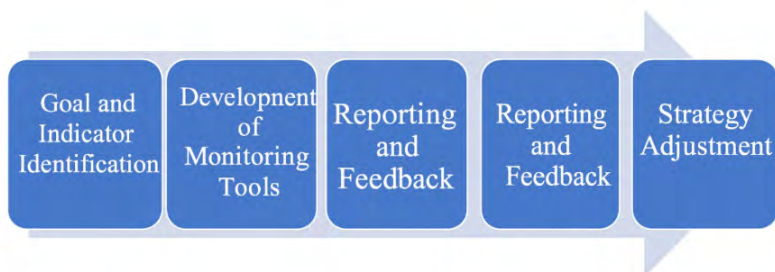


Fig. 7.6. The Process of Developing and Implementing Monitoring and Evaluation Mechanisms for Cultural Heritage Governance Policy in a Territorial Community

Source: Compiled by the authors.

Let us examine the key elements of this process in a territorial community:

1. Defining goals and indicators.

The first step is to establish specific goals that the cultural heritage governance policy aims to achieve, along with selecting appropriate indicators to measure progress. These may include the number of visitors to cultural sites, the volume of investments in heritage conservation, levels of community satisfaction, and others.

2. Developing monitoring tools.

The next step involves creating mechanisms for collecting, analyzing, and visualizing data related to the selected indicators. This may include developing databases, designing questionnaires, conducting audits, and other relevant activities.

3. Data collection and analysis.

Once the tools are in place, regular data collection and analysis must be conducted. This allows stakeholders to identify trends, detect potential issues, and make informed decisions based on empirical evidence.

4. Reporting and feedback.

A crucial stage of the process is the publication of monitoring and evaluation results to ensure transparency and accountability. It is equally important to engage the community by encouraging feedback, comments, and suggestions for further action.

5. Adjusting the strategy.

Based on the findings of the monitoring and evaluation, specific measures can be developed to improve the strategy. This may involve revising the original goals, introducing new programs, or modifying the implementation approach of existing projects.

In conclusion, the development and implementation of monitoring and evaluation mechanisms for cultural heritage governance in a territorial community is a key step toward ensuring sustainable development in this field. A well-designed system of indicators enables objective assessment of results, while efficient data collection and analysis ensure timely responses. Engaging the public and expert community helps address diverse needs and ensures a more transparent, responsive, and effective policy. This approach fosters continuous oversight of heritage-related tasks and allows for the timely adjustment of strategies in response to evolving circumstances and priorities.

7.5. Advocacy Practices

One of the successful examples of heritage management practices in Ukraine is the **“Stare Misto” (Old Town) initiative in Lviv**. This project applies a comprehensive approach to the preservation and revitalization of the city’s historic center, encompassing building restoration, improvement of public squares and streets, and the organization of cultural events and guided tours. The initiative actively engages residents and the broader public in the planning and implementation of projects, fostering a sense of ownership and civic responsibility for cultural heritage [15].

Equally notable is the work of the **Public Council on Cultural Heritage Protection and Use**, which operates under the Lviv City Mayor’s Office. The Council plays an active role in the development and implementation of strategies for the preservation and sustainable use of cultural heritage in Lviv. It conducts public consultations, provides expert recommendations to local authorities, and monitors the execution of adopted policies and decisions [15].

In other countries, a prominent example of successful advocacy and policy development in local heritage management is found in **Kraków, Poland**. The city has made significant efforts to involve the public in decision-making processes concerning the protection and use of its cultural assets. The **Kraków Heritage Trust** serves as an active advocate for the preservation of the city’s historic landmarks and engages

citizens in restoration programs and broader cultural heritage initiatives [16].

Another illustrative case is the **“City of Wind” initiative in Riga, Latvia**. This program aims to utilize cultural heritage as a driver for urban development and the enhancement of community well-being. Through participatory governance, the city administration – together with local organizations – has developed and implemented a series of projects focused on the preservation and adaptive use of historic sites throughout the city [17].

7.6. Barriers and Challenges in Cultural Policy Formation

Political, economic, and socio-cultural factors present significant challenges and barriers to improving the management of local cultural heritage in Ukraine (see Figure 7.7). Among them, political and institutional factors are particularly critical obstacles to the effective development and preservation of local heritage. A lack of political attention to this field, inadequate funding, and the absence of efficient institutional mechanisms can greatly hinder progress in cultural heritage governance.

Insufficient financial resources and cumbersome bureaucratic procedures complicate the implementation of

restoration works, conservation activities, and cultural events. Limited funding often leads to project delays and poses risks to the preservation of historic monuments and sites.

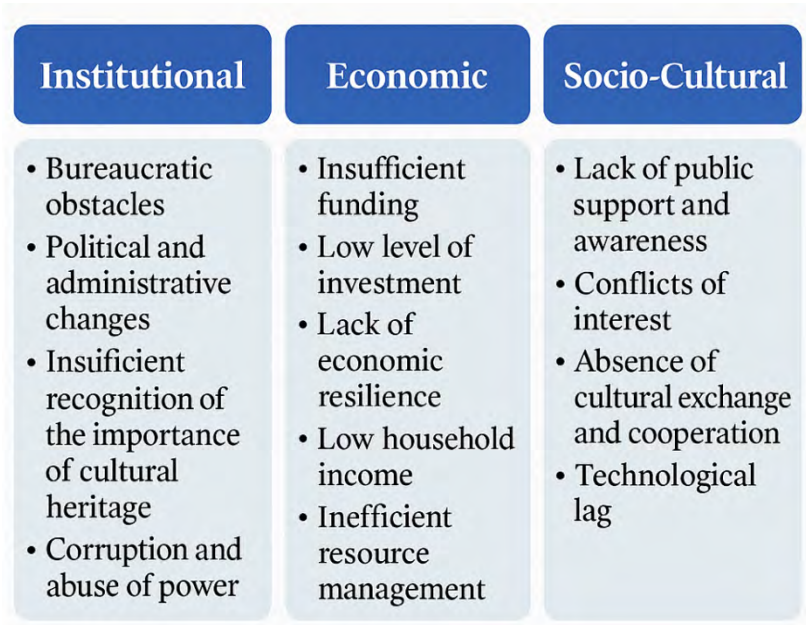


Fig. 7.7. Limiting Factors in Local Cultural Heritage Management in Ukraine

Source: Compiled by the authors.

Frequent changes in government leadership and administrative structures result in discontinuity in heritage management efforts and shifting cultural policy priorities. Moreover, political instability contributes to inconsistent

financial support and reduced state commitment to long-term cultural projects.

These issues emphasize the urgent need for institutional continuity, stable public financing, and the integration of cultural heritage into the broader agenda of local and national development.

The management of cultural heritage often depends on the activities of various national, local, and civil society actors. Lack of coordination among these stakeholders can result in overlapping efforts, competency conflicts, and inefficient use of resources. In some cases, cultural heritage is undervalued or not considered a policy priority by authorities. This can lead to insufficient attention to the preservation of historic sites and limit opportunities for their development. Moreover, misuse of public funds, corruption, and political interference pose significant threats to the effective management of local cultural heritage, resulting in the loss of valuable historic sites and the devaluation of cultural assets.

Economic constraints also present serious challenges to improving local heritage governance. Insufficient funding at both national and local levels can limit access to the resources needed for the preservation and development of heritage assets. One of the most pressing challenges is the underfunding of conservation, restoration, and development projects for historic buildings and cultural spaces. Budgetary limitations may restrict the implementation of conservation measures, cultural programming, and the provision of supporting infrastructure. A

lack of investment in cultural heritage impedes the implementation of large-scale projects, while inadequate funding hampers essential repair and restoration work.

Economic instability further exacerbates the situation, as it leads to cuts in public spending on culture and heritage. During periods of crisis, investments in heritage restoration are often frozen. The low-income levels among the population limit the capacity of communities and local governments to mobilize resources for heritage-related initiatives. Without sufficient financial support and public backing, the implementation of restoration and development projects becomes exceedingly difficult. Additionally, poor allocation and management of available funds reduce the overall effectiveness of heritage management programs.

Socio-cultural barriers also complicate the management process. A lack of community interest, as well as low levels of public awareness regarding the importance and value of heritage, hinder preservation and development efforts. The absence of public support can prevent the successful realization of heritage projects. Without active civic engagement, significant improvements in heritage management remain elusive.

The presence of multiple social and cultural groups with competing interests often creates conflicts in setting heritage priorities. For example, infrastructure development plans may contradict the goals of historic preservation. The lack of mechanisms for cultural exchange and cooperation among communities and regions also limits opportunities for mutual

learning and joint development of cultural heritage. Furthermore, the limited use of modern technologies in heritage preservation may hinder documentation, research, and promotion. Inadequate access to digital tools and online resources restricts the ability to work with archives and other critical information sources.

Thus, socio-cultural obstacles can become major challenges on the path toward improved local heritage management. It is crucial to promote public involvement and foster a positive public attitude toward heritage to overcome these barriers.

The outlined factors significantly constrain the effective preservation, development, and governance of cultural heritage at the level of territorial communities. They underscore the need for a comprehensive approach and systemic changes in policy, the economy, and society.

7.7. Policy Recommendations for Stakeholders

The challenges of managing local heritage in Ukraine require active advocacy and systematic engagement from the public, professional associations, and cultural sector organizations. Advocacy helps raise public awareness about the importance of preserving and developing cultural heritage, attracts additional resources, and garners government support for implementing necessary projects and programs. This approach strengthens dialogue between civil society, authorities,

and the expert community, contributing to improved heritage management and safeguarding its values for future generations.

Advocacy contributes to raising public consciousness, mobilizing resources, and creating favorable conditions for addressing issues in this field, ensuring the preservation of cultural heritage for the future. Following the evaluation of the effectiveness and impact of implemented measures in local heritage management, various opportunities for further action may emerge policy improvement, expansion of advocacy efforts, dissemination of information and educational outreach, cooperation with international partners, and the engagement of new stakeholders. Overall, the process of advocacy and local heritage management is dynamic, requiring continuous monitoring, strategy updates, and the active involvement of diverse stakeholders to achieve meaningful progress.

Effective advocacy for local cultural heritage requires a coordinated effort among stakeholders at multiple levels. The following **policy recommendations** aim to enhance the protection, promotion, and sustainable management of heritage assets through inclusive and strategic engagement.

1. **Strengthen Legal and Institutional Frameworks.** National and local authorities should ensure that cultural heritage is integrated into relevant legal and policy documents, including spatial planning, education, tourism, and environmental policies. Clear mandates and responsibilities for heritage management must be established across sectors and governance levels.

2. **Foster Multi-Stakeholder Collaboration.** Public authorities, civil society organizations, academic institutions, local communities, and the private sector should be encouraged to collaborate on advocacy campaigns and policy dialogues. Creating formal mechanisms for consultation and joint decision-making can help align priorities and leverage shared resources.

3. **Empower Local Communities.** Communities should be recognized as key custodians of heritage. Policies should promote community participation in decision-making, support traditional knowledge, and enable access to funding for grassroots initiatives. Capacity-building programs for local advocates and cultural leaders are essential for long-term impact.

4. **Promote Awareness and Education.** Advocacy efforts should be underpinned by public awareness campaigns and educational programs that highlight the value of cultural heritage for identity, cohesion, and sustainable development. Schools, museums, and media outlets play a crucial role in shaping perceptions and mobilizing support.

5. **Ensure Transparency and Accountability.** Transparent decision-making, inclusive policy formulation, and accessible reporting mechanisms are essential to maintain public trust and legitimacy in heritage governance. Stakeholders should advocate for open data on heritage sites, funding, and conservation actions.

6. **Align with International Standards and Best Practices.** Stakeholders should advocate for the alignment of national and local policies with international conventions and frameworks,

such as the UNESCO Convention on the Protection of the World Cultural and Natural Heritage. Cross-border cooperation and exchange of good practices should be promoted.

By implementing these recommendations, stakeholders can enhance the effectiveness of advocacy efforts and ensure that cultural heritage remains a dynamic and inclusive resource for present and future generations.

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Conclusions

This book has explored the multifaceted nature of managing local cultural heritage through the lenses of policy, practice, and innovation. Drawing on international frameworks, national contexts, and local case studies, it has demonstrated that effective heritage governance requires a balanced interplay between regulatory instruments, participatory approaches, and adaptive innovation. Cultural heritage is not merely an object of preservation but a dynamic resource for identity-building, sustainable development, social cohesion, and resilience – particularly in times of crisis and transition.

The chapters have underscored the importance of integrative strategies that align heritage policies with broader agendas such as climate action, digital transformation, regional development, and inclusive governance. Innovations in digital heritage, public-private partnerships, and community-led initiatives have shown promising pathways toward more responsive and democratic heritage management.

At the same time, challenges remain. The fragmentation of policy frameworks, the lack of long-term funding, capacity gaps at the local level, and unresolved tensions between development and conservation continue to hinder progress. Addressing these issues requires coordinated efforts across sectors, improved institutional capacities, and context-sensitive solutions.

Future research directions may include:

- Developing robust methodologies for evaluating the socio-economic impact of heritage-led regeneration.
- Investigating the role of heritage in post-conflict recovery and reconciliation processes.
- Exploring ethical dimensions of digital heritage, including access, ownership, and representation.
- Studying resilience mechanisms of heritage institutions in the face of war, climate disasters, or displacement.
- Advancing participatory models for co-creating heritage strategies with marginalized communities.

Ultimately, managing local cultural heritage in the 21st century demands a forward-looking, interdisciplinary, and inclusive approach – one that embraces both tradition and innovation, and is grounded in shared values, sustainability, and human dignity.

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Managing Local Cultural Heritage: Policies, Projects and Innovations

This book explores contemporary approaches to the management of local cultural heritage through the lens of public policy, innovative practices, and community-based projects. Drawing on Ukrainian and international experiences, it addresses how heritage can be a resource for sustainable development, local identity, and post-crisis recovery. Topics covered include participatory governance, heritage digitization, tourism, advocacy, and strategic planning. Special attention is given to the challenges of heritage management in wartime and post-war contexts.

Combining theoretical insights with practical case studies, the book is intended for researchers, policymakers, cultural managers, and community leaders engaged in heritage development and preservation.

About the Authors

The editorial team brings together scholars and practitioners with expertise in public administration, cultural policy, innovation, and project management. They have collaborated with national institutions, international organizations, and local communities to support heritage-based development initiatives in Ukraine and beyond.



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