



WP 3 Capitalizing and market implementation of fortified heritage for economic growth of cities and regions

Output 3.3.10

Guideline

Effective Monument Financing

and

Fortress Management



This project is implemented by the
CENTRAL EUROPE Programme
co-financed by the ERDF



Content

1. Introduction:

A Case Study of Economy and Funding
of the Bavarian Fortified Heritage 3

2. Main Topics and Results of the Study 5

3. Guidelines and Strategies 8

1. Introduction

A Case Study of Economy and Funding of the Bavarian Fortified Heritage

Basis of this guideline is a case study of economy and funding of the Bavarian fortified heritage which was done within the context of work package 3. In the ongoing process several fortresses outside of Bavaria were incorporated into the study because of lack of data from “The Bavarian Administration of State-owned Palaces, Gardens and Lakes”. Finally eleven monuments in different parts of Germany, in Austria and Hungary were considered:

- Fortress Lichtenau (Bavaria, Germany)
- Fortress Rothenberg near Schnaittach (Bavaria, Germany)
- Plassenburg in Kulmbach (Bavaria, Germany)
- Veste Coburg (Bavaria, Germany)
- Fortress Rosenberg in Kronach (Bavaria, Germany)
- Wülzburg near Weißenburg (Bavaria, Germany)
- Fortress Kufstein (Austria)
- Fortification system Komárom (Hungary)
- Fortress Königstein (Saxony, Germany)
- Fortress Erfurt (Thuringia, Germany)
- Citadel Spandau (Berlin, Germany).

To initiate a study on the economy and funding of fortresses on the one hand and to give a guideline of effective monument financing and monument management on the other hand becomes obvious looking at some of the typical problems of fortified heritage:

- big potential of fortified cultural heritage is not used enough for the economic, cultural and social development of cities and regions;

- nearly all fortified monuments as relicts of empires military history characterize a complex of deficits in monument policy, economy, financing, utilisation, management, marketing or reconstruction and monument protection;
- deficits can be found Europe-wide.

Therefore a systematic knowledge progress was needed to get to new procedures and instruments for an effective strategy. The main instrument to gain knowledge was a questionnaire, but also different documents have been integrated and studied.

2. Main Topics and Results of the Study

To study fortresses in the field of economy and management and to develop an effective strategy one has to be aware of the fact that fortified monuments vary in several ways. They vary in terms of

- ownership
- funding base
- building maintenance and repair
- utilization concept and investment strategy
- administration and management structure
- income and cost situation

These features were first singled out and ranked separately in the following three tables

- table 1: ownership, structural condition, management structure and assessment of management
- table 2: utilization concept – structural maintenance, tourism, events, marketing summarized assessment
- table 3: finances – income generation, cost management, transparency of finances, assessment

In a next step these features and the results of each fortress within were put together again to come to a final result which is (notes: 1 – very good, 2 – good, 3 – satisfied, 4 – sufficient, 5 – bad):

- 1,0: Königstein, Kufstein
- 1,1: Komárom
- 1,9: Spandau
- 2,1: Rosenberg
- 2,2: Veste Coburg
- 2,8: Petersberg
- 2,9: Plassenburg

- 3,6: Wülzburg
- 4,6: Rothenberg

Königstein and Kufstein are at the top of the list for a couple of reasons. Let's have a look at Fortress Königstein (1,0):

- is one of the biggest mountain fortresses;
- characterized by an exceptional topographical situation in the tourist area of Saxon Switzerland;
- is not far away from Dresden, the capital of Saxony, itself a highly attractive tourist center;
- is an important place of Saxonian history;
- since 1955 the fortress is a military historical outdoor museum of high tourist value;
- transportation of visitors is organized with the help of several elevators, one with a panorama view;
- conservation status is very good;
- a total of about 46 million € were invested in the renovation and expansion of the Fortress Königstein between 1991-2010 by the Free State of Saxony;
- on 14 October 2005, the 25 millionth visitor was welcomed since opening 1955;
- each year more than 400.000 guests visit Fortress Königstein;
- marketing und utilization concepts for generating better income were worked out and are running;
- each year several event highlights take place;
- a lot of programs for visitors and guided tours are offered;
- one main feature is the marketing strategy "Fortress Königstein for children and families";
- disabled persons can equally visit the fortress;
- special programs for disabled persons are offered;
- there a special parking lots for busses next to the fortress;
- an ownership and management structure especially for the fortress was created in 2002 as Non-profit Ltd.;
- the state of Saxony is the owner of territory and buildings; i.e., there is no cost for the renovation and preservation of the building;

- the company is only responsible for the management and care of the whole plant with all facilities, all exhibitions, events, the rent, the public relations and bears the current and the investment costs;
- all expenses are paid out of its own revenues,
- the company receives no subsidies (except in some cases grants for staff by the Employment Agency);
- the potential annual surpluses for larger Investments - e.g. new permanent exhibitions – are accrued in reserves.

...vice versa the situation at Fortress Rothenberg (4,6):

- owner is the “The Bavarian Administration of State-owned Palaces, Gardens and Lakes”, a public authority of the Ministry of Finances of the State of Bavaria;
- conservation status is very bad;
- the fort itself is accessible, but the outside area only limited because of danger of collapse;
- only a very limited tourist use is possible;
- 7.000 visitors come to Rothenberg each year;
- an utilization concept for generating better income doesn't exist;
- a fortress management structure doesn't exist;
- a NGO is responsible for maintenance;
- the NGO has neither enough money nor staff;
- interest by the State Authority in cost analyses doesn't exist;
- no parking lots for busses or cars do exist;
- no possibilities for disabled persons to visit the fortress do exist;
- since 2007 no highlight events do exist;
- no tourist shop or restaurant does exist.

These two fortresses represent two contrasting examples of models of funding and managing fortified monuments. The comparison of the two can lead to a number of general guidelines which are presented in the next chapter.

3. Guidelines and Strategies

Fortresses in general have lost their military functions. They represent an important part of history and are of high architectural value. So it does exist a responsibility to preserve and use the fortified heritage also in the 21st century.

To use fortresses for tourist purposes is a main strategy to bring back life to these historical monuments. But the tourist approach does not automatically lead to success. It does exist an active competition within, e.g. between single fortresses, but also castles, gardens and many other cultural tourist destinations have to be taken into account.

One requirement to get into a good position in the tourist market is to clarify a funding and management strategy based on clear political commitment. Political commitment means: the fortified heritage must not be seen as a heavy burden by the State or municipal administration, but as an economic chance for the city or region. And it has to be clear too that in the first place investments in reconstruction and tourist offers have to be financed based on a clear tourist strategy. Then a company should run the business of the fortress and should try to regain all expenditures of running the fortress. There is a wide spectrum of increasing income.

Let's learn from Fortress Königstein:

- develop a coherent management and tourist strategy;
- create tourist offers for the whole family;
- define older and disabled persons as a tourist target group and create specific offers;
- organize highlight events throughout the year;
- build nearby parking lots for cars and busses;
- create a wider tourist infrastructure nearby or in the fortress (restaurant, hotel);
- ease access to the fortress, e.g. via elevator;
- integrate fortress tourism into the regional tourism of the area

An economic approach based on the aim to increase income is at the heart of the strategy. But it is also important to recognize the fact that income in tourism can vary. In other words tourist numbers are changing throughout the years, they can increase, but also decrease. So at the end of the day one has to rely on a clear political commitment to preserve the fortified heritage.

This guideline will close therefore with the summarizing proposition of the study:

Clear regional political statement for the preservation and development of fortification is necessary for a success.