

1985-2015

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# EUROPEAN HISTORIC HOUSES

*30<sup>th</sup> Anniversary*



## Activity Report

2014 - 2015



# Contents

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<b>Foreword</b> .....	<b>4</b>
-----------------------	----------

<b>Chapter 1: Main issues</b> .....	<b>6</b>
-------------------------------------	----------

European Alliance 3.3 .....	7
European taxation related to historic houses – Comparison of EU countries .....	9
Environmental and energy issues .....	14
EU projects - H2020 & Petite Loire .....	18

<b>Chapter 2: Events</b> .....	<b>20</b>
--------------------------------	-----------

Council of Europe participation .....	21
General Assembly in Lisbon (2014) .....	22
Successful management of private movable heritage .....	24
Involving the younger generation: First Next Gen Conference .....	26

<b>Chapter 3: Communication</b> .....	<b>28</b>
---------------------------------------	-----------

<b>Channels</b> .....	<b>29</b>
Facebook .....	29
Website .....	29
Newsletter .....	29
Leaflet .....	29
<b>Press</b> .....	<b>30</b>
Articles .....	30
<b>Upcoming events</b> .....	<b>31</b>
<b>Welcoming Estates</b> .....	<b>32</b>

<b>Chapter 4: Members</b> .....	<b>34</b>
---------------------------------	-----------

Our members .....	35
Our observers .....	40

## Pictures on the cover:

**Top-left:** 'Quinta do Convento do Carmo – Portugal'

**Top-right:** 'Vêves Castle – Belgium'

**Bottom-left:** 'Beloeil Castle – Belgium'

**Bottom-right:** 'Pädaste Manor – Estonia'

# Foreword

As the European Historic Houses Association celebrates its 30<sup>th</sup> year of existence, we are presented with a unique opportunity to consider the state of Europe's private cultural heritage. Much has changed over these years and the influence of the European institutions can no longer be overlooked in discussions on topics as diverse as tax legislation, environment and illicit trafficking of cultural goods. Our Association has grown accordingly; today we have 23 national member associations, uniting over 50.000 European historic houses. Despite their different histories, the owners of these houses all face similar challenges and united representation is an invaluable way to address them.



This is why, on this momentous occasion, I would like to start by paying tribute to those who had the foresight to create and develop an organization defending the common interests of private owners to the European institutions, as well as facilitating exchange between the national member associations. Special recognition is due to Mr. Heike Kamerlingh Onnes, who founded our Association in 1985. I would also like to thank my predecessor, Ghislain d'Ursel, and Delphine Dupeux, our long standing Senior Policy Officer, as well as all the interns who put their dynamism and skills to use for the preservation of Europe's unique cultural heritage.

Our mission to promote and protect the cultural value of European historic houses is as important as ever. Many historic houses are falling into ruins and even greater numbers are financially unsustainable for their owners. This is particularly sad when keeping in mind that the recent report "Cultural Heritage Counts for Europe"<sup>1</sup> has shown that the full economic and social potential of Europe's unique cultural heritage is enormous. Historic houses are an invaluable part of people's identity and civic pride, contributing to their quality of life, as well as providing unique economic

opportunities in the fields of artisanal construction and tourism.

Already, according to figures from 2010, 9 million jobs in the European Union depend directly or indirectly on cultural heritage tourism and historic houses are often the jewels of a region's cultural heritage<sup>2</sup>.

The European institutions have been increasingly taking into account these facts. Following the constructive conclusions of the Council of the European Union on cultural heritage, we saw the publication by the Commission of the ground breaking Communication "towards an integrated approach to cultural heritage for Europe". The European Parliament welcomed this Communication, which emphasizes the complementarity of national and European initiatives to protect cultural heritage, and endorse it in a plenary vote in September 2015.

In this, we are greatly helped by the recent publication of the report 'Cultural Heritage Counts for Europe', in which, for the first time, all the available factual information regarding Europe's historic heritage has been compiled. With this report in hand, we have more credibility in the eyes of the European institutions

than ever before and I have no doubt that this report will contribute to increasing the awareness of the specific challenges faced by private owners of cultural heritage. However, this report has also shown that we need to continue to push, together with our partners, for complementary research on the topic of the preservation of private cultural heritage.

In fact, despite growing awareness and political goodwill, private owners continue to face tangible challenges in running their estates. One challenge that has had our specific attention over the past year is the issue of illicit trafficking and the protection of private movable heritage in general. On this matter, we have followed closely the recent initiatives of the European Commission, the European Parliament and beyond that those of Interpol. The topic of illicit trafficking will also be dealt with at our annual General Assembly, which this year we have the pleasure of organizing in Belgium. As a country on the crossroads of different European cultures, its castles and manors provide a hotbed for innovative projects that will certainly be of great interest to our members.

An anniversary is, however, not only an opportunity to look to the past, so allow me to say a word about the future of our Associa-

tion and Europe's private historic houses. This future is perhaps best exemplified by our recent project to set up a trans-European network of young heirs and owners, the NextGen Group. We believe that the young generation represents a new way forward and that we cannot fail to involve the new generation that will one day take over the management and protection of historic houses across Europe. Giving Young Governors a seat in our General Assembly is one important first step in this sense. The creation of pan-European networks of young heirs and owners across our members' regions will support our aim of smoothing succession and preparing the next generation in their role as future guardians of Europe's private heritage. These structures are vital to the exchange of information and experiences between dynamic and innovative entrepreneurs from all over Europe.

Rodolphe de Looz-Corswarem



<sup>1</sup> [http://www.encatc.org/culturalheritagecountsforeurope/wp-content/uploads/2015/06/CHCFE\\_FULL-REPORT\\_v2.pdf](http://www.encatc.org/culturalheritagecountsforeurope/wp-content/uploads/2015/06/CHCFE_FULL-REPORT_v2.pdf)

<sup>2</sup> Council of the European Union, Council Conclusions (14976/10), Brussels, 14 October 2010

# Chapter 1: Main Issues



## European Alliance 3.3

The European Historic Houses Association is one of the founding members of the European Heritage Alliance 3.3, Europe's major heritage network. Its members bring together Europe's civil society organisations, historic cities and villages, museums, heritage professionals and volunteers, (private) owners of collections of artefacts, historic buildings and cultural landscapes, educators, town planners, etc.

This alliance, launched on the occasion of Europa Nostra's European Heritage Congress 2011, unites 32 European and international networks and organisations in the field of cultural heritage. The name of the Alliance refers to the article 3.3 of the consolidated version of the Lisbon Treaty of the European Union, which stipulates that "[The Union] shall respect its rich cultural and linguistic diversity, and shall ensure that Europe's cultural heritage is safeguarded and enhanced."

United, its members have a stronger and more credible voice on issues relating to Europe's untapped cultural, natural, movable and immovable heritage, the Alliance meets biannually. The last meeting took place in February 2015 and provided an occasion to discuss the numerous projects running on the European level.

A first issue of consideration during this meeting was the decision of the new European Commission and the on-going "own-initiative" report of European Parliament on cultural heritage adopted in 2014 and 2015. The first signs show a strong personal commitment from both the new Commissioner and Members of the European Parliament to the cause of cultural heritage preservation. This commitment is clear in the continuation of the 'New Narrative for Europe'<sup>1</sup> initiative that has a strong cultural heritage dimension and in the growing support for a European Year of Cultural Heritage.

Furthermore, the Alliance discussed a drive to establish a permanent data collection system on cultural heritage in cooperation with EUROSTAT, the European Union's statistical bureau. Such a system would greatly benefit the sector, by allowing the European Commission and the other actors in the field to identify the main challenges facing Europe's heritage and design targeted programmes to address these issues. This aspect was discussed in relation to the ground breaking study "Cultural Heritage Counts for Europe"<sup>2</sup>.

This study emerged from a long-term research project that was set in motion following the Alliance 3.3's 2012 report "Towards an EU Strategy for

<sup>1</sup> <http://www.europeanheritagealliance.eu/>

<sup>2</sup> [http://ec.europa.eu/culture/policy/new-narrative/index\\_en.htm](http://ec.europa.eu/culture/policy/new-narrative/index_en.htm)

Cultural Heritage – the Case for Research.” The “Cultural Heritage Counts for Europe” study, published in June 2015, aims to assess the social, cultural and economic value of cultural heritage by collecting and analysing the plethora of available data. It is the first time such a comprehensive overview of the cultural heritage sector has been produced, and as such, it is an extremely valuable resource for anyone working in the field of heritage preservation. We are hopeful that, with the evidence provided by this report in hand, we will more than ever be able to highlight the importance of private cultural heritage to European officials and decision-makers alike. As the European Heritage Alliance 3.3 keeps growing in effectiveness and influence, the European Historic Houses Association will continue to highlight the interests of the private owners of Historic Houses. Cooperation with our bigger partners provides a unique opportunity to bring this often-overlooked niche of cultural heritage to the attention of prime policy makers on the European level.

## The Capacity Building Days

In April 2015, Europa Nostra organised the “Capacity Building Days”, an intense three-day pro-

gramme aimed at strengthening the capacity of its Member Organisations. The event gathered the Executive Officers of Heritage NGO’s (or their representatives) and was also attended by the European Historic Houses Association and the European Landowners’ Organization. During these three days, we had the opportunity to discuss with several important European officials and politicians. The European Historic Houses Association did, for example exchange views with Michel Magnier, the director for Education and Culture at the European Commission, on the latest policy developments on cultural heritage at the European Commission. Furthermore, we had the chance to meet with Zoltan Krasznai, who works at the Commission’s Directorate General for Research and Innovation, to discuss the role of cultural heritage in the Horizon 2020 strategy and Miltiades Kyrkos, a Member of the European Parliament, to speak about cultural heritage tourism.

As these days were a great success, Europa Nostra will organize them again in 2016. This time, the days will focus on the opportunities of digital technologies.

Learn more at:

<http://www.europeanheritagealliance.eu/>



## European taxation related to historic houses – Comparison of EU countries

	Income tax		Property tax	Wealth tax	Capital gains tax	Death duties	VAT
	Rates	Deductions					
Austria	Up to 50%	All expenses in connection with the rental income may be deducted. Not regular maintenance costs may be distributed over 10 years. Interest on loans deductible. Rental Loss cannot be carried forward. (Only rental income if overall profit expected – otherwise private activity)	Real estate transfer tax 3, 5% resp 2% (transfer to relatives). Real property tax is not considerable.	No	25% for capital gains on buildings acquired after 31-3-2002	Real estate transfer tax on heritage. Preferential real estate tax base if heir is close relative	10% on rental of flats; 0% or optional 20% on renting of business real estate
Belgium	25-50%  General “tax shift” foreseen for end of 2015	Regional matters since 01/07/2014 => no more federal deduction on income tax for owners in case of renovation or maintenance of a protected monument. Only regional subsidies granted on request for transformation and maintenance of protected monuments. Interest on loans deductible under conditions.  Income tax reduction for sponsorship (40€) on listed projects in a legal foundation.	Regional taxes from 1.25%-2.5% on rateable value.	No	16,5% if sold within 5 years 33% in case of proved speculation	Regional matter min. 3 % to max. 30 % (direct heirs), (up to 80% non-family)  Since 2015, the surviving spouse is partially exempted of inheritance tax on family housing in the 3 regions	General rate: 21%  6% house repairs and maintenance on private buildings older than 5 years  From 01/01/2016, the rate of 6% will be applied only for constructions older than 10 years.
Czech Republic	15% flat rate	100% in case of maintenance of rented property	CZK 6.00/m2 + CZK 0.75/ m2 for every floor above the ground floor. Listed monuments exempt, in case they are open to public based on an agreement with Ministry of Culture	4% transfer tax in case of sale to be paid by seller.	15% as income tax.	Exempt in direct and secondary line.  15% in indirect line	Base rate: 21% Reduced rate: 15% For maintenance of listed monuments reduced rate is applicable, in case they are open to public based on an agreement with Ministry of Culture

	Income tax		Property tax	Wealth tax	Capital gains tax	Death duties	VAT
	Rates	Deductions					
Denmark	40-60%	Approximately 30% of maintenance and renovation (indoor + outdoor)	Listed buildings can avoid property tax if special declaration is registered.	No	40-52% None if the owner has inhabited the property.	0% between spouses, children 15%, from grandparents 36,25%	25%
Estonia	21%	Deductions for sport, health and education; for house loan  NOT for maintenance and/or restoration of historic houses	Not for property;  land tax rate is variable depending on local county decision, max is fixed	No	No	No	20%; 9% for cultural events and accommodation
Finland	0-50 %	Mortgage interest	General property tax 0,8-1,55% residential building 0,37-0,8% other buildings and sites 0,8-1,55%	No	30-33% 0% own home if used and owned longer than 2 years	8-36% according to amount + relationship	24% 14% agricultural goods + food 10% accommodation, entrance fee (cultural events)
France	Rate = 0% if income < 9 690 €  Rates =14 % if income ≥ 9 690 € & < 26 764€  Rate =30% if income ≥ 26 764 € & < 71 754 €  Rate = 41% if income ≥ 71 754 € & < 151 956€  Rate = 45% if income > 151.956 €	For listed buildings owned directly or through a family or approved civil real estate corporation: - 50% of charges if house closed, - 100% if house opened to the public  Income tax reduction for restoration work on listed movables that can be seen by the public: 18% of expenditure  Income tax reduction for sponsorship -66% of the amount can be deductible under conditions	Land Tax and Council Taxes. Different rates according to regions, towns and department  Depends on the city infrastructures  Application of the legal doctrine called "exceptional houses", that take into consideration specific features of historical buildings	Exempted under 1.300.000 € net taxable hereditament  If hereditament > 1 300 000€, wealth tax due as follows: - From 800 000€ to ≤1. 300.000€ Rate = 0,5% - From 1.300.000€ to ≤2.570.000€ rate = 0,7% - From 2.570.000€ to ≤ 5.000.000€ rate =1% - From 5.000.000€ to ≤10.000.000€ rate =1,25% - Over 10.000.000€ rate is 1, 50%.  - works of art and antiquities exempted  - forest taxed at 25% of value  - Wealth tax can be partly given to sponsorship	Capital gain taxes on building: Exempted for principal residence  Otherwise: Capital gain on building is taxed following the income tax rate Deduction for income tax (effective January 1st 2014): -6% every years from the 6th year to the 21st year  -4% every year from the 22nd year. Exempted after 22 years of property  Deduction for social taxes: -1.65% every years from the 6th year to the 21st year. -1.60% for the 22nd year, -9% every year from the 23rd year. Exempted after 30 years of detention	From 5% to 45% depending on the family relationship  - If not family relationship 60% from the 1st €  If special agreement with indefinite time has been signed with ministries, historical buildings can be exempted. The owner has to open the building from 60 to 80 days per year, commitment during his life and cannot sale it.	- 10% houses older 2 years if the work does not lead to the construction of a new building (from January 1st, 2014)  - Normal rate: 20% (from January 1st 2014)
Germany	14,0% - 45,0% plus solidarity surcharge 5,5% of the calculated income tax.  (Total: 14,77% - 47,48%)	Tax deduction spread over 10 years for restoration works.  Prior approval required.	0,8 - 1,8 % of the rateable value (Grundsteuer). A change of the existing law is in progress.	No	Exempt (own home) if used longer than 2 years otherwise 10 years same rates as income tax	Generally from 7% to 50% depending on the size and relationship. But historic houses: - exemption > 60% - total exemption if open to public.	19% (7% for agricultural goods, food and print products)

	Income tax		Property tax	Wealth tax	Capital gains tax	Death duties	VAT
	Rates	Deductions					
Greece	0-45%	Mortgage interest if house smaller than 35 m2 pp (up to two), 25 m2 for every child	Communal tax 0,025 - 0,035%	No	No	0-60% depending on amount relationship children max 25%	18%
Ireland	22-44%	Maintenance deduction providing certificate of importance by public works + open to public	No	3% probate tax on death 6-9% stamp duty on house purchase	Yes, purchase price + index deducted from sale value. Exemption if re invested within 2 yrs rate 20%	20/40% allowance £ 188.000 + contents exempt if displayed in suitable house 60 days a year for six years + lived in permanently by decujus	- 20% - 12,5% private dwellings for repairs + maintenance if labour content > 60%
Netherlands	Owner occupied dwellings: 1.85%-52% income tax on net rental value. Investments: 1,2% of market value	80% of the maintenance costs of listed monuments is tax deductible.  Interest on loans for owner occupied dwellings deductible.	Communal property tax for user + owner varies from town to town. Indication: 0.5% of value.	No	No	Listed country estates under Nature Preservation Act 1928 exempt if estate opens to public. If not open, 50% exempt. Conditional upon continuation of listing for 25 yrs.	21% 6% : Painting and plastering services for the renovation and repairing of private dwellings more than 15 years old
Italy	19 / 43% for leased historical houses taxable income is 65% of rents. Unrented historical houses pay only IMU	- 19% of maintenance of listed buildings if prior approved - 50% spread over 10 years + 1/2 of 19% immediately= 59,5%; max € 96.000 - 19% of mortgage interest if owner occupied	- IMU (Communal tax n.1): - 0,2% -10,6% of half cadastral value -TASI (Communal tax n.2) : 0,8% of half cadastral value - Land tax: 1% - Mortgage duties: 2%	9% stamp duty on real estate transactions	Only if profit result of change in character or legal status	None for listed monuments and mobile goods (archives, statues, paintings etc.)	- 22% - 10% for restoration + maintenance of private dwellings (only for a maximum of € 96.000 per year)
Portugal	14,5-56%	15% of interest on mortgages for purchase of restoration of houses, up to the limit of 296€	Exemptions for entirely listed estates. The exemptions also apply in case of property transfer tax.	No	Yes, same rate as income tax over 50% of capital gain. No reduction for time owned No tax if sale home reinvested	Exemption for listed monuments. Replaced by stamp duties from 2004 on. No exemptions foreseen in case of listed monuments, but tax does not apply in case of direct heirs.	23%

	Income tax		Property tax	Wealth tax	Capital gains tax	Death duties	VAT
	Rates	Deductions					
Spain	It is estimated that in 2015 the tax will be reduced to 20% and 47% and in 2016 to 19% and 47%	15% of maintenance + restoration costs of listed buildings. Not more than 10% of owners taxable revenue	Exemption for Grade 1 listed houses and gardens. Historic buildings with an economic exploitation are not exempted.	Yes, exemption for listed houses  The non exempted buildings normally have the following taxes: 0,20 – 2,5% But the tax is determined by the Regions (Comunidades Autónomas) some examples: - Andalucía: 0'24-3'03 % Galicia: 0'24-3'03% Catalonia : 0,21-0,2750	The gain/patrimonial increase became a part of the tax basis of the Income Tax.  Prayed exemption: the transfer of real estate of urban nature members of the Historical, declared individually "cultural interest" or included in the scope of a "historical-artistic whole" and are protected by the urban planning with the highest level of protection provided during the tax period, have been conducted in the same rehabilitation, conservation or improvement, by their owners or holders of real rights.	7,65–34% depending on kinship and wealth recipient 95% reduction for all listed houses and gardens  The Regions (Comunidades Autónomas) can approve other percentages. For example, Catalonia: 7-32% depending on kinship and wealth recipient.	- 21% - 10% bricklaying repairs private dwellings
Sweden	Earned income 31% council, 25% state. Income from capital 30%. Income tax at an income over 620 000 SEK can totally be up to 57% Part of income from private business taxed as capital 30%.	Interest 100% deductible. Maintenance, repairs, restoration costs deductible. 50% of labor costs up to SEK 100.000 deductible against tax paid.  <b>Benefit value tax</b> Owner using the house for his home gets a value of the benefit added to his taxable income.	0, 75% of 75% of market value on habitable houses maximum SEK 6.362/ house.  No other property tax.	No	30%	No	25% 12% food, restaurants, hotels and camping 6% books, entrance fees museums
Switzerland	Federal around 10% Canton higher commune	Maintenance costs can be deducted	No	Commune + canton variable	Only canton Rates reduced, long possession. Variable	None between spouses and in direct line	7,5%

	Income tax		Property tax	Wealth tax	Capital gains tax	Death duties	VAT
	Rates	Deductions					
United Kingdom	20-50% (45% from April 2013)	No deductions or allowances except where house is run as a business and taxed as such (but the ability to set house business losses against other income will be severely reduced from April 2013)	Local Council Tax charges varying by regions according to use	No, but an Annual Charge on high value houses (>£2m) owned by companies is proposed from April 2013, but houses open for 28 days are expected to be exempt	18% (28% for top rate income tax payers) but principal private residence + grounds exempt. Other reliefs also available for certain categories	40% above £325,000. Lifetime transfers exempt if donor lives more than 7 years. Exemptions for pre-eminent houses + contents if open to public. Transfers between spouses also exempt. Agricultural land and some family owned business may be exempt if certain conditions are met.	20%, including on listed building repairs. Extension of 20% VAT on improvements to or alterations of dwellings from 1 Oct 2012



# Environmental and energy issues

## Nature Protection

Historic houses are usually the centrepiece of estates and territories with rich gardens, landscapes, nature, and biodiversity. Private owners are guardians, and sometimes have been for centuries, of this rich environment, which they have preserved because of their passion, and awareness of climate change and resource scarcity. Indeed, private individuals are more and more aware of their responsibility vis à vis the society at large, conscious that they are managing common goods which hold the roots of EU cultural heritage.

The European Historic Houses Association is involved in environmental issues mostly through its collaboration with the European Landowners' Organization (ELO) and promotes and participates to several projects as the Wildlife Estates Label, the Pollinator Network initiative, the Hercules Project, and the European Tree of the Year.



## The Wildlife Estates Label (WE)

The WE Label promotes exemplary management in EU territories for the conservation of biodiversity mostly looking at the preservation of fauna and flora and their habitats. The project focuses on the holistic approach of sites taking into account different rural activities like agriculture, forest, hunting and fishing. Also valued are criteria based on the enhancement of cultural heritage and the communication and education on the estate towards the general public.

There are two levels to be completed by any participant before they can qualify for the WE Label: **Level 1:** signing the WE Label Charter and **Level 2:** completing the WE Label Questionnaire.

Successful applicants will receive the WE Label, which will be reassessed after 5 years.

If you like to apply for the WE label, please contact [wildlife@elo.org](mailto:wildlife@elo.org) and visit the website [www.wildlife-estates.eu](http://www.wildlife-estates.eu)



## Pollinator Network initiative (PNi)

PNi is a network of farmers and land managers acting for biodiversity willing to use field margins as a "bed" of plants, rendering them particularly adapt for pollinators such as bees and butterflies. This is a joint initiative that promotes a model of economically viable, highly productive and resource-efficient agriculture in terms of land use demonstrating that modern farming and environmental management can coexist on the same field.

The Pollinator Network initiative's ambition is to provide training support for farmers, land managers and agronomists about the benefits of having field borders such as buffer strips, hedges that are designed for increasing biodiversity on their field.

It is also designed to create a forum for knowledge-sharing on sustainable agriculture practices

for biodiversity all around Europe and enhance the harmonization of our current agricultural system within the European landscapes.

If you would like to receive more information or participate in the program please contact Julianna Nagy: [greening@elo.org](mailto:greening@elo.org)



## European Tree of the Year

The European Tree of the Year contest originated in 2011. It was inspired by the popular Tree of the Year contest, which has been organised in the Czech Republic by the Czech Environmental Partnership Foundation for many years. The European round is a finale consisting of the winners of the national rounds.

The purpose of the European Tree of the Year is to highlight the significance of old trees in the natural and cultural heritage that deserves our care and protection. Unlike other contests, the European Tree of the Year does not focus on beauty, size or age but rather on the tree's story and its connection to people.

During the whole month of February, every individual had the possibility to vote for his or her favorite tree online at [www.treeoftheyear.org](http://www.treeoftheyear.org)



## Hercules Project

European cultural landscapes are valued as everyday living environment, countryside, heritage, scenery with aesthetic and recreational qualities and unique biodiversity and as a source of ecosystem services that they provide to society. Cultural landscapes, however, are undergoing rapid and fundamental transformations across Europe, mainly as a result of an on-going polarisation of land-use, with abandonment and rural exodus on the one hand, and intensification and urbanisation or peri-urbanisation on the other. Although the specific drivers and outcomes of these processes vary across Europe, a central tendency is the fundamental decoupling of the social and ecological subsystems in cultural landscapes: linkages between people and nature, in many parts of Europe often tightly linked historically, disperse increasingly. This leads to the degradation of biodiversity and cultural heritage values, and renders the future of many of these landscapes highly uncertain.

The HERCULES project strives for the empowerment of public and private actors to protect, manage and plan for sustainable cultural landscapes at local, national and pan-European scales. HERCULES has the goal to increase understanding of drivers, patterns and social-ecological values of European cultural landscapes and to use this knowledge to develop, test and demonstrate strategies for their protection, management and planning.

For more information visit [www.hercules-landscapes.eu](http://www.hercules-landscapes.eu) or contact Julianna Nagy at [julianna.nagy@elo.org](mailto:julianna.nagy@elo.org)





## Energy issues and building sector challenges

The EU energy efficiency agenda has been packed in 2015. The main aspect of our work and mainly our coalition<sup>3</sup> was focus on the revision of the Energy Performance of Building Directive (EPBD). This Directive affects directly the life of private owners and tenants. In the impact of this Directive, there is a clear distinction between offices, shopping centres, hotels and logistical properties owned and managed by property companies and everything else: offices, shops and housing owner-occupied or rented out by small proprietors.

Through active discussions with EU institutions, the coalition tried to make sure that the EPBD has built-in safeguards to ensure that the scale of the energy efficiency renovation stays within the owner's comfort zone: the renovation can be limited to part of the building and must be cost-optimal. These safeguards must be preserved. We are convinced that the only way to further foster renovation is to incentivise the interested parties, but it is necessary to do so thoughtfully. We are perfectly aware that public finance is scarce. Nonetheless, we would like to stress that our long-standing experience and direct contact with owners demonstrate that in order to trigger the decision to do energy efficiency renovation it is crucial to blend incentives by mixing loans with grants or tax rebates.

We are convinced that the nature of private ownership requires special consideration by the Commission at the earliest stage of the legislative process. In particular, we believe that it is important to learn from the difficulties encountered in implementing the existing directives to ensure that further legislation does not cause EU energy efficiency policy to be a source of public frustration and rejection of the European Union.

Our concern was to address in the first phase of the legislative process when the Commission en-

visaged the consultant's terms of engagement and during the impact assessment. We intended to contribute by reviewing certain challenges that we foresee concerning review of the EPBD's provisions on measures to ensure minimum energy performance requirements. Especially the scale and cost of renovations, possible financial incentives, opportunities for certification and the relation with the Commission's Energy Efficiency Directive and Renewables Directive had our attention. The Coalition's previous writings and meeting with Commissioner Oettinger already gave good arguments.

Energy efficiency is such a complex challenge with so many local components that the first step in any new EU legislative surge needs to be to get a realistic handle on how far EU regulation can usefully and cost-effectively go. It is striking to see that Impact Assessments on EPBD, etc. focus on the positive impacts in terms of job creation and benefits for the construction sector and less on the real estate sector (owners, investors, and landlords). In our view, the Impact Assessment should also address the impact of the very unequal degree of energy efficiency development across the Union and the Energy performance certificates issues.

In principle these requirements related to EPBD are applied to historic buildings as well, but there are exceptions. Except for the system inspections, Member States may decide not to apply the requirements listed above to (among other things) "buildings officially protected as part of a designated environment or because of their special architectural or historical merit, in so far as compliance with certain mini-

mum energy performance requirements would unacceptably alter their character or appearance" and "buildings used as places of worship and for religious activities". The European Historic Houses Association will be primarily vigilant on maintaining the exception for listed buildings in the Directive but will pursue with the coalition the efforts toward pragmatic energy efficient measures for private owners.

The temptation of the EU is to expand energy efficiency to the sustainable buildings concept. Last year, the European Historic Houses replied to the EU consultation on this matter. In 2015, we will make sure to avoid any new paradigm that could underpin the private built sector. This is linked to several own initiative reports that were adopted in the Parliament related to Resource efficiency and more recently on Energy Union.

## Real estate related activities

The European Historic Houses together with its partners is involved in the European Semester work related to rent control regulation. The coalition sent a paper on the situation in France. It was the 2nd paper of this kind prepared by our united organisations, following the previous one on the impact of Danish rent control. This paper provides an analysis of the French rental legislation, focusing mainly on the initial consequences and estimated expected impact of the French ALUR Act (Loi pour l'Accès au Logement et un Urbanisme Rénové) of March 2014 preceded by the 2012 "Duflo Decree".

We are also following the activities of the URBAN Intergroup at the European Parliament which since 2004 ensures that urban and housing related issues are reflected in European Parliament's discussions. Although the European Union does not have a mandate to take action on housing issues, EU policies are not housing neutral. Hence, the strong support of Europe's housing actors for the continuation of URBAN was successful as the intergroup was renewed for the 2014 - 2019 terms.

<sup>3</sup> Coalition of real estate organisations : European Historic Houses Association; European Landowners' Organization; European Property Federation; International Union of Property Owners; The European Group of Valuers' Associations



# EU projects - H2020 & Petite Loire

## Horizon 2020

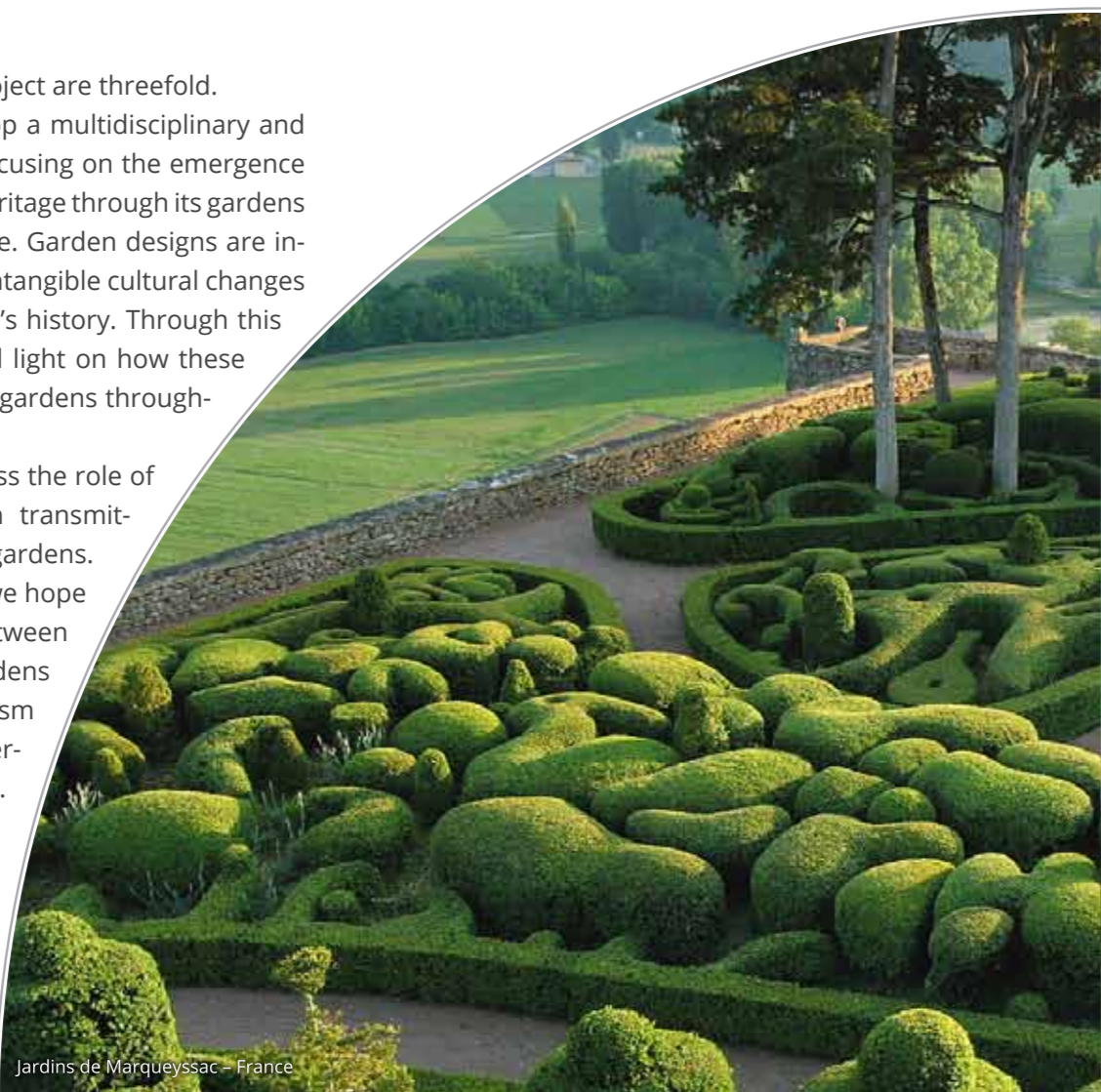
In 2014, the European Commission launched a six-year, 80€ billion research and investment programme called Horizon 2020. To capitalize on this opportunity, the European Historic Houses Association cooperated with a consortium, including, among others, the Università degli Studi di Roma la Sapienza and the European Landowners' Organization, to propose a project for European funding. This project, that is currently being studied by the European Commission, focuses on the heritage value of Europe's Historic Gardens. We believe that the gardens surrounding Historic Houses play a pivotal role in the preservation of Europe's tangible and intangible cultural heritage. They have the potential to promote cultural diversity from an environmental perspective and document the intangible cultural heritage of both the past and the present in cross-cultural adaptation of plants and landscape architecture.

The objectives of this project are threefold. Firstly, it seeks to develop a multidisciplinary and comparative research focusing on the emergence of a European cultural heritage through its gardens in a historical perspective. Garden designs are influenced heavily by the intangible cultural changes that characterize Europe's history. Through this project, it hopes to shed light on how these changes are reflected in gardens throughout Europe.

Secondly, it aims to assess the role of modern technologies in transmitting cultural heritage of gardens. Lastly, with this project we hope to establish a link between the valorisation of gardens and education and tourism developments, with a perspective of Europeanisation.

In this project, the European Historic Houses Association provided input through its specific expertise regarding Europe's Historic Houses and their traditional centuries old gardens. Together with the European Landowners' Organization, we wrote part of the submission, focusing on the engagement of stakeholders and citizens in the preservation of historic gardens. Local communities often have strong links to the historic houses and gardens and their support can be extremely valuable to the protection of private heritage.

For more information on the Horizon 2020 programme, please visit <http://ec.europa.eu/programmes/horizon2020/>



Jardins de Marqueyssac - France



## De Kleine Loire / La Petite Loire

Together with its partners, the European Historic Houses Association participates in an innovative tourism project that seeks to promote the rich cultural heritage of the Scheldt river valley. This trans-regional and trans-national valley boast more than 63 castles, gardens and domains. However, as of now, the administrative fragmentation of the region hinders the promotion of this incredibly rich cultural heritage. Tourists visiting castles are often unaware of the context of a region stretching more than 150 kilometers, across national and linguistic borders. That is why, through cooperation between the different stakeholders, this project aims to construct a unified programme for tourists visiting the region.

Currently, this venture is still in preparation, but we are hopeful that, once all actors have given their approval, we can take this proposal to the

European Commission as an example of cultural cooperation across borders, emphasizing the European dimension of the challenges facing Historic Houses.

More information on the project can be found at <http://dekleineloire.be/>



Attre Castle - Belgium

## Chapter 2: Events

### Council of Europe participation

*“Cultural heritage in the 21<sup>st</sup> century for living better together towards a common strategy for Europe”*

On the 23<sup>rd</sup> and 24<sup>th</sup> of April, the European Historic Houses Association was invited to the Meeting of the Ministers of Cultural Heritage of the Council of Europe. For this event, 38 national delegations and 25 international organizations, including, for the first time, civil society, gathered in Namur to talk about the future of Cultural Heritage in Europe.

This was a unique opportunity for the European Historic Houses Association to, for the first time, interact with policy-makers at this high-level conference. We used this occasion to stress the importance of private cultural heritage in Europe to a new audience.

In addressing this conference, Rodolphe de Loos-Corswarem recalled how much private cultural heritage contributes to Europe’s economies, as well as to the development and social cohesion of its regions through the creation of jobs for

local craftsmen. As a vector for Europe’s young entrepreneurs and an opportunity for personal accomplishments, it is an important driving force of the sustainable growth of the countryside.

Our president also underlined the importance of partnerships between the different actors involved, such as the Europa Nostra led Alliance 3.3 of which the European Historic Houses Association is an active member. Furthermore, he cautioned the participating politicians not to transpose blindly every European and international Convention and regulation concerning cultural heritage, urging them to consider the contributions of the owners of private historic houses before adding complex and costly regulation.

Finally, in accordance with the purpose of the meeting and the other interventions, he invited the participants to look to the future. Technology, environment and landscapes, as well as involving families, including the younger generations, in the preservation of these goods are all key to the future of Europe’s unique heritage.

During the last session, the Council of Europe adopted the ‘Declaration of Namur’, which lays the foundations for a common strategy of awareness and recognition of the European cultural heritage. Furthermore, the ministers issued the ‘Namur Call’, calling on all countries of the world to protect their endangered cultural heritage, notably in response to the recent news from Iraq.

More information at:

[http://www.coe.int/t/dg4/cultureheritage/heritage/6thConfCulturalHeritage/newsroom\\_en.asp](http://www.coe.int/t/dg4/cultureheritage/heritage/6thConfCulturalHeritage/newsroom_en.asp)



## General Assembly in Lisbon (2014)

In October 2014, the European Historic Houses Association had the pleasure of organizing its Annual General Assembly in Lisbon, where we were generously welcomed by our Portuguese member Association, the Associação Portuguesa das Casas Antigas and its dynamic president Hugo O'Neill. The programme of this four-day event included the General Assembly, uniting the Governors and representatives of our member Associations as well as our observers, a high level conference on the cultural importance of heritage preservation, and two days of visits to castles and historic houses in the Lisboa region. It proved to be an excellent occasion to discuss the opportunities and challenges to European cultural heritage in the light of the aims and priorities of our Association, as well as to hear about innovative approaches to the preservation of cultural heritage all across Europe.

The General Assembly itself took place in the Palácio Porto Covo, the erstwhile British embassy and current Lisbon headquarters of the Lusitania Seguros group. Here the President of the European Historic Houses Association, Comte Rodolphe de Looz-Corswarem, had the opportunity to assess with the Governors, the main actions that were undertaken by the Association since the last General

Assembly and to set out a roadmap to continue working towards the recognition of the issues facing historic houses by policy makers on the European level.

On the occasion, we were also honoured to have three new member Associations, from Greece, Norway and Latvia, be formally accepted into the Association. Furthermore, for the first time Young Governors were welcomed during the General Assembly, signalling a landmark in our project to involve the young generation in our activities.

During the conference a keynote speech Mr. Jorge Barreto Xavier, the Portuguese Secretary of State for Culture, set the stage for a high-level round table discussion between speakers of very diverse backgrounds and occupations, including the Secretary of State for Tourism and a chairman of the board of Portugal's National Centre for Culture. This conference was the perfect opportunity to learn more about the preservation of cultural heritage and its relation to civic pride and the quality of life. The speakers emphasised the importance of a shared responsibility between the government and the owners of the historic houses for the preservation of the cultural heritage these houses represent and discussed extensively on the opportunities, as well as the challenges, tourism poses to the owners of historic houses. Every attendee of this

conference gained a better understanding of how private building patrimony can reaffirm national identity and civic pride.

This day full of interesting and rewarding discussions ended with a Gala Dinner at the prestigious Palácio dos Marqueses de Fronteira. During this memorable evening, we took the occasion to honour the Convento de Santa Ana da Ordem do Carmo by awarding Mr. Thorne the European Historic Houses Award for his impressive restoration of the building that was done with respect for the original architecture, while adding a high value for society through the employment of local artisans.

The last days of programme were dedicated to visits of several of the most exquisite historic houses in the Lisboa Region. First, the guests were welcomed by the passionate owners of the Quinta da Penha Verde near Sintra for a tour of the property. Here they admired, among others, the renowned dining hall and beautiful gardens. Next, the guests were provided with lunch at the charming Quinta do Bomjardim in Belas, before being hosted by Mr. Frederic Coustols at the Palácio Belmonte for a tour and a port wine tasting while enjoying the magnificent view from the terrace.

The last evening, the Count and Countess Sao

Lourenço hosted the guests for dinner in the charming Palácio dos Marqueses de Sabugosa.

On the last day of the programme, the guests visited the historic city of Sevilha, where they could admire the architecture and culture of the old town and visit two of the most important historic monuments in Portugal. Namely, the impressive Forte de São Filipe and the monumental Convento de Jesus, which is unfortunately one of the seven most endangered monuments in Europe according to Europa Nostra.

As everyone commenced their voyage back to their respective home countries, they could look back on days filled with innovative examples of good management of cultural heritage and extensive discussions on the importance of historic houses for a country's national identity and civic pride.



# Successful management of private movable heritage

## DOROTHEUM SEIT 1707

On Wednesday, March 18, 2015, Dorotheum, the European Historic Houses Association and the Belgian Royal Historic Houses Association organized their second joint conference at the Cercle de Lorraine on the “Successful management of private movable heritage”.

During this conference, renowned speakers presented their point of view as art experts and experts on succession legislation. Rodolphe de Looz-Corswarem and Bernard de Gerlache, President of the European and Belgian Royal Historic Houses and Gardens Associations, introduced the conference with a pledge to preserve in good shape Europe’s fragile Historic Houses and their gardens, as well as the cultural goods they contain.

Then Mr. de Wilde, lawyer, lecturer, author and specialist on patrimonial law and inheritance tax systems opened the conference with a lecture entitled “From maximum enjoyment to tax-free transmission”. He developed his presentation around several scenarios in the frame of a succession to come. All of these, from reconstituted families and “ideal scenarios” to collector fathers, showed that the sharing of inheritance should not be too problematic when it concerns goods.

Indeed, the tax administration does not have a great deal of control and cannot force the owners to open their house to visitors. Nevertheless, the administration can obtain information under some circumstances. For

example, when the owner insures his furniture, sells his goods publically or goes to court over family conflict regarding the sharing of inheritance. Even in these cases, the owner has several solutions within easy reach. For example, performing a donation with usufruct through a Dutch notary, creating a civil company of common law, or putting in place a private foundation.

After this very instructive intervention from Mr. de Wilde, Ms. Sabine Taevernier, member of the Topstukkenraad, end 19th-20th century art expert, and President of Ensor Advisory Committee, spoke on how to deal with the Flemish Topstukkendecreet and export charges. Notably, Mrs. Taevernier insisted that the filling system in Flanders is a classification by list and not by category and

cerns only the good that is exceptional, rare and useful to the Community. This filling system was elaborated in order to avoid the flight of exceptional goods from Flanders and to supervise the restoration of classified objects.

Mrs. Ryckbost, specialist in public and administrative law, expropriation and immovable heritage, then took the floor. She works with the Belgian Association on the new Flemish Decree on Monuments and Sites and its implication for private owners. She underlined the many discrepancies in the text that mixes the Convention of UNESCO and the Convention of Granada. She showed to the assembly that the new decree consisted

in a property right’s limitation –giving access to houses containing cultural goods-, without any consultation of the

owner and any compensatory measures.

Around 120 participants followed the conference, which ended by a round table allowing the participants to ask their questions to the different speakers. A cocktail and exhibition was organized at Dorotheum to expose the spring acquisitions.



# Involving the younger generation: First Next Gen Conference

The question of “transmission” is the cornerstone of the European Historic Houses’ existence and deserves a durable and strong engagement. That is why we aim to include the young generation of heirs and castle owners in the running of the Association. In 2010, our members gave a real impulse to this ambition when they chose to allow the participation of young delegates in its General Assembly. Furthermore, they gave the green light for the creation of a Next Generation group, coordinated by the dynamic William Cartwright-Hignett.

The first European Historic Houses’ NextGen Annual Conference took place on March 20-22, 2015, in the historic house of Aynhoe Park, near Oxford, UK. These three productive busy days were an opportunity to bring together young entrepreneurs from across Europe for cultural visits, a day of Conference sessions and social gatherings.

In his opening speech, Rodolphe de Looz-Corswarem, Executive President of the European Historic Houses Association, reminded the audience that Cultural Heritage is of major importance to Europe due to its spill-over effects into other sectors. For instance, the tourism sector, heavily dependent on cultural heritage, is estimated to contribute €415 billion to the EU GDP, with Europe’s 3.4 million tourism enterprises accounting for 15.2 million jobs. As such, it provides invaluable opportunities for innovative entrepreneurs, many of whom belong to the younger generation of owners.

William Cartwright-Hignett, Coordinator of the NextGen Group, underlined that it is a privilege as well as an enormous responsibility to own and live in a historic house. The next generation has the additional pressure of managing inheritance, es-

pecially if one does not live on the property. He further noted that succession can undoubtedly create complex family dynamics. It is vital that heirs learn lessons from the past and continue innovation in order to keep a property relevant in the modern days, without destroying its unique historic – and often fragile – essence. He explained that this is where the NextGen Group Coordinator can provide its assistance: by supporting and facilitating the organisation of national groups and creating a common platform for learning.

The Conference’s first session was dedicated to the development of Next Generation Groups in each country, with the aim of creating a network to assist national and international lobbying efforts by National groups and the European Historic Houses Association. It was confirmed that several groups have already been constituted in Italy, UK, Spain (both Madrid and Barcelona) and Portugal, with several others on their way. The second session aimed at identifying what should be the research focus for 2015-2016. Chaired by James Hervey-Bathurst, Vice-President of the European Association, the session revolved around several issues relating to management of succession planning. Speakers, including Ms. Clarissa Vallat (Director of Tax & Heritage at Sotheby’s) and Ms. Patricia Sykes (Partner at Hunters Solicitors), underlined the unique requirements of solutions offered to each family, but also the importance of communication and planning ahead to ensure a stress-free inter-generational transition. The second Panel – “Making it Pay: diversification for the ‘modern’ historic house” – dealt with practical stories of mixing the running of an estate with working in the outside world. Viscount Raynham, Chairman of the UK HHA Next Generation, and Ms. Annie Gondras, a French writ-

er and expert in heritage development, showed examples of both active (e.g. weddings) and passive projects (e.g. renewable energy), insisting on the necessity of finding a balance between opening the house to the public and the risks lying behind – including a loss of privacy, openness to thefts, etc. The key to remaining ahead of the game, the panel agreed, was to adapt to the competitive changing market. Mr. James Perkins, businessman, collector and owner of Aynhoe Park, added that owners should not be afraid to show their personality in their house and to find innovative ways to market the property through a long-term vision.

Finally, the keynote speaker Mr. Michael Farrant, Partner and Head of Private Clients at Project Associates, spoke about “Reputation and Privacy in an online world”. He warned the audience about the risks of public exposure. Nowadays, more than ever before, a person’s social footprint quickly spreads internationally. He stated that the ideal is to find a good balance between transparency and privacy, because creative fiction can quickly rush in to fill a vacuum of information online, so to say nothing may be worse than saying something.

The next day was devoted to leisurely activities. Most notably, several visits to Historic Houses in the region and a ball in the evening. This provided the young owners with a perfect opportunity to exchange their experiences in running or inheriting a Historic House and to bond with their peers from all over Europe.

Eleven countries were represented at this first conference. This showed both the desire and the need for greater representation by the young actors in the national associations as well as for a better promotion of what young representatives can do for their associations. The European Historic Houses Association and its coordinator seek to meet these needs. That is why we will continue the building of the groups ahead of the 2016 Conference, which will take place near Paris, France.



<sup>4</sup>[ec.europa.eu/public\\_opinion/flash/fl\\_328\\_en.pdf](http://ec.europa.eu/public_opinion/flash/fl_328_en.pdf)EUROBAROMETER

# Chapter 3: Communication

## Channels

Communication with our members and other interested parties remains at the core of our work. This year we have paid particular attention to communicating our core message to the new members of the European Parliament and the new European Commission. At the same time, we have continued to engage with our regular audience through our traditional channels.



### Facebook

On our Facebook page we regularly bring our own work and interesting developments in the field of cultural heritage to the attention of our followers. We believe that the direct access this provides is an invaluable tool to engage the friends of Europe's historic houses.

<https://www.facebook.com/pages/European-Historic-Houses-Association/426588480691622?fref=ts>



### Website

Our website presents all information related to our Association in an organised manner. Anyone interested can find information on our activities and all our recent publications. It is also a way to keep track of our events. As such it is the go-to place for everyone with an interest in our work.

<http://www.europeanhistorichouses.eu/>



### Manifesto

As the end of 2014 saw the influx of a large number of new politicians in Europe, we decided to publish a manifesto in which we clearly summarize our positions on issues relating to historic houses. This is an invaluable tool in bringing our work to the attention of policy-makers in Brussels.



### Newsletter

The Newsletter provides an accessible overview of our ongoing activities and is published between 2 and 4 times per year.

Articles



**EHHA General Assembly: "Heritage: Use It or Lose It"**

The European Historic Houses Association organized its 20th General Assembly from the 2nd to the 5th of October in Dublin. The conference entitled "Heritage: Use It or Lose It". The cultural importance of heritage preservation, city pride and quality of life took place in the public Parks and gathered together among others, the Secretary of State for Culture Jerg BARRAKAT, SECRETARY and Adolfo ARRIQUETA, SECRETARY, the Secretary of State for Tourism.

The conference tackled the importance of the cultural heritage in the wealth and quality of life of the EU citizens. Heritage is not just a relic of the past, it is a living part of our lives. It is the soul of a city, the heart of a nation. It is the story of our people, of our struggles, of our triumphs. It is the memory of our ancestors, the wisdom of our forefathers. It is the foundation of our identity, the source of our pride. We must protect it, we must cherish it, we must use it. For if we lose it, we lose ourselves.

**All The Importance of Heritage?**  
The human being lives in time and has an acute consciousness of that fact. Everything we experience, but feel or think is within a time sequence. The fact is a present, which has a past and a future, we are mortal creatures and we are probably aware of it. To act in the future we need to have our feet well rooted in the past, we have to be well aware of the world around us, and to be focused on the future. Following G. G. Galilei, we believe that all thought is the critical ordering of a past thought. Therefore, without heritage there is no new production of culture. It is not Philosophy, we believe, we believe nothing new.



**Heritage: Use It or Lose It**

Delphine DUPEUX, EHHA General Assembly Country Side 153, September-October, p.4-5

**The "European Heritage Alliance 3.3": Resources for Cultural Heritage**

Juliette POLIZZI, Country Side 155, January-February, p.14



**The "European Heritage Alliance 3.3": Resources for Cultural Heritage**

The European Heritage Alliance 3.3, an informal European platform composed of 32 European and international networks and organisations active in the wider field of cultural heritage, was launched in June 2015 on the occasion of the European Heritage Congress 2015, organised by Europa Nostra in Amsterdam.

The title of this Alliance refers to the article 3.3 of the Lisbon Treaty of the European Union which states that "The Union shall support the cultural and linguistic diversity in Europe and shall ensure that Europe's cultural heritage is safeguarded and enhanced".



The Alliance meets twice a year in a city which is chosen to be the host of the next meeting. These meetings are essential as they allow knowledge from the various fields of cultural heritage to be shared and the need for more resources to be identified. The Alliance 3.3 is a platform for the European Historic Houses Association which is particularly active in the cultural heritage field. The Alliance 3.3 is a platform for the European Council under the leadership of the European Council under the leadership of the Commission of the European Communities. It is a platform for the European Council under the leadership of the Commission of the European Communities.



Juliette POLIZZI, EHHA



**La première conférence annuelle Next|Gen**

Considérant de plus en plus que la jeune génération joue dans la préservation et la reconnaissance du patrimoine bâti, l'Association européenne des demeures historiques (AEDH) a été un grand plaisir en organisant en 2015 de nombreuses heures dédiées à son Assemblée générale et à la décision de créer un groupe « Next Generation » en 2014, consacré par le document intitulé « CASÉRIENNE 2015 » à la question de la transmission et à la jeune génération de l'architecture.

La première conférence annuelle Next|Gen s'est tenue le 20 et 21 mars 2015, dans le domaine historique d'Herbe Park près de Clouffe au Royaume-Uni, sous la présidence de l'Association européenne des demeures historiques. Ces deux jours d'intenses discussions ont permis l'échange de connaissances et l'élaboration de nouvelles idées et projets communs.

La seconde session avait pour but d'établir des liens entre les membres de la jeune génération et les membres de l'Association européenne des demeures historiques. Les participants ont discuté de la transmission de l'architecture et de la reconnaissance du patrimoine bâti.

La première session de la conférence a été consacrée au développement des jeunes. Les participants ont discuté de la transmission de l'architecture et de la reconnaissance du patrimoine bâti.

**Next Generation Group's first Annual Conference**

Juliette POLIZZI, Country Side 157, May-June, p. 14

OCTOBER 2015

**Kleine Loire: Meeting stuurgroep-comité**  
Egmontkasteel, Zottegem, Belgium



**Association of Castle Owners in Czech Republic: "The Royal Music" to celebrate the 20th anniversary of the Association**  
Panny Marie pod řetězem, Prague



**Queen Elizabeth II Conference HHA: Annual General Meeting**  
Centre, London



**European Commission: The EU's Tourism Education & Training Offer - a mapping exercise and performance check**  
Square Meeting Center, Brussels



**Meeting of the Alliance 3.3**  
Brussels Offices Europa Nostra, Brussels



NOVEMBER 2015

**Europa Nostra: Council meeting**  
Luxembourg



DECEMBER 2015

**ELO: The European Biodiversity Conference**  
European Parliament Brussels



MARCH 2016

**ELO: Forum for the Future of Agriculture**  
Square Meeting Center, Brussels








# Chapter 4: Members

## Our members

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