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OLTENIA'S SUBCARPATHIANS – METHODS AND TECHNIQUES FOR CULTURAL HERITAGE VALUATION

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Oltenia's Subcarpathians - methods and techniques for cultural heritage valuation

Tatiana Ivana

Les Subcarpates d'Olténie - méthodes et techniques pour l'évaluation du patrimoine culturel. Les Subcarpates d'Olténie disposent de nombreux éléments du patrimoine culturel-historiques, qui offrent à la région une grande valeur touristique et qui, dans le même temps, peuvent représenter les prémisses pour le développement économique. Dans cette étude on désire analyser l'attractivité touristique du patrimoine culturel de la région, afin de déterminer les prochaines stratégies de développement. Donc, d'une part ils ont été analysés les objectifs touristiques du patrimoine culturel, selon des critères bien établis (l'attractivité, l'intérêt, la complexité, le grade de connaissance, l'accessibilité, l'équipement touristiques) et d'un autre part ils ont été analysés les localités dans lesquelles ces objectifs sont situés, considérant la valeur touristiques des objectifs, le nombre d'objectifs d'intérêt national et international, l'infrastructure et la distance jusqu'à les grandes concentrations humaines.

Mots clés. patrimoine culturel, attractivité touristique, critères d'évaluation, localité touristique.

Subcarpații Olteniei - metode și tehnici pentru evaluarea patrimoniului cultural. Subcarpații Olteniei prezintă numeroase elemente de patrimoniu cultural-istoric, care dau o valoare remarcabilă zonei din punct de vedere turistic și pot constitui premise ale dezvoltării economice. Prin prezentul studiu se dorește realizarea unei analize cât mai detaliate a atractivității turistice a zonei prin prisma patrimoniului cultural de care dispune, în vederea stabilirii unor posibile direcții de urmat în vederea dezvoltării. În acest sens, pe de o parte au fost evaluate obiectivele turistice aparținând patrimoniului cultural din arealul de studiu, pe baza unor criterii bine stabilite (atractivitate, interes, complexitate, cunoaștere, accesibilitate, dotări), iar pe de altă parte au fost evaluate localitățile pe teritoriul cărora se află aceste obiective, ținându-se cont de valoarea obiectivelor turistice, de numărul obiectivelor de interes național și internațional, de infrastructura de care dispun, de distanța față de marile concentrații umane.

Cuvinte cheie. patrimoniu cultural, atractivitate turistică, criterii de evaluare, localitate turistică.

1. GENERAL CONSIDERATIONS

Cultural heritage knew many definitions along the time; at origin this term means public goods, inherited from ancestors, and changed its sense during last centuries [1]. Cultural heritage consists in all monuments and groups of buildings which are of an outstanding universal value from the point of view of history, art or science and also all sites which are of an outstanding universal value from the historical, aesthetic, ethnological or anthropological point of view [2]. It represents all elements resulting from the interaction between humans and environment, like a proof and an expression of values, faiths and traditions evolution. North Oltenia generally and Oltenia's Subcarpathians particularly has many elements of cultural heritage, who offer an outstanding value to the area, and can represent the prerequisites for local economic development.

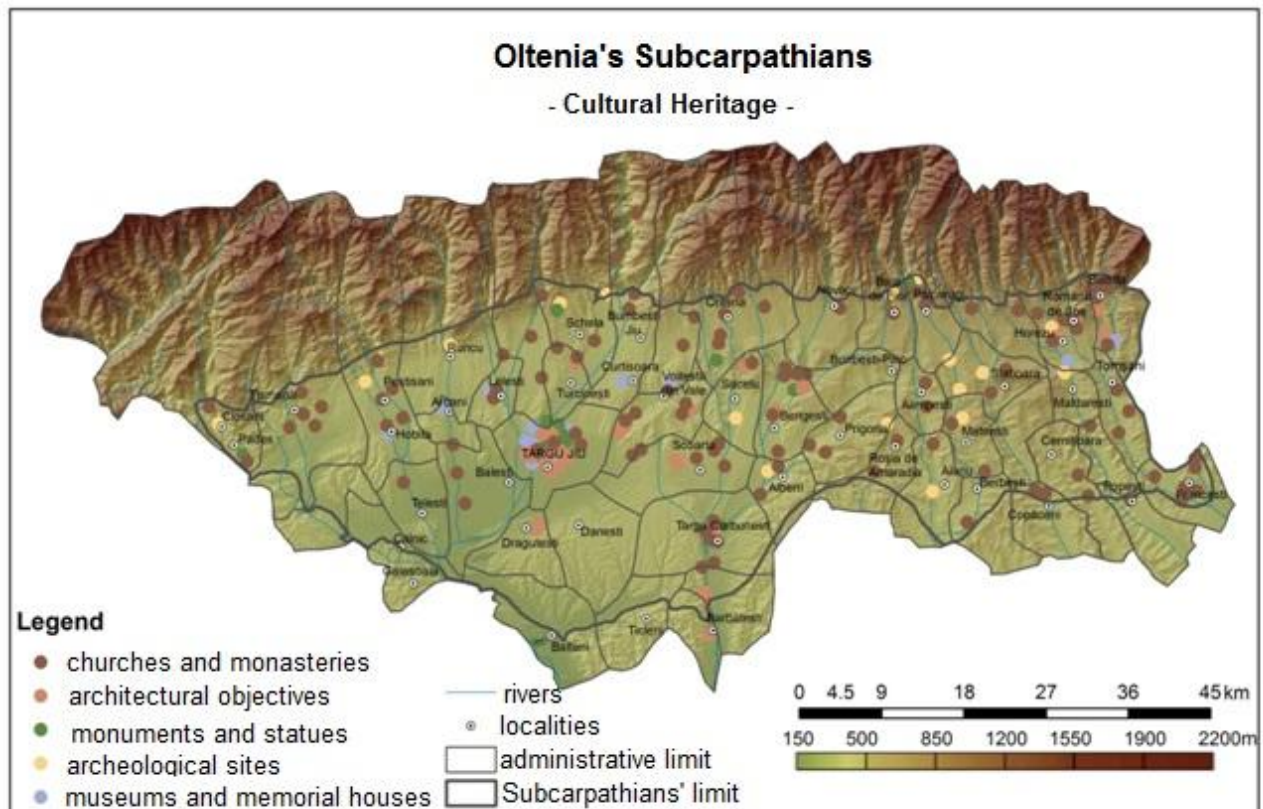


Figure 1: Oltenia's Subcarpathians Cultural Heritage

Oltenia's Subcarpathians are a complex touristic zone, situated between Motru and Bistrița Valleys, having both natural and cultural heritage elements. For our study, the great importance is presented by many archeological, historical and architectural objectives and also by many museums, statues and ethnological objectives, registered on the Historical Monuments List [3], completed with some buildings that not represent cultural heritage

elements itself, but which contain mobile heritage stuff. The most important attractions (Figure 1) are churches and monasteries (for example Tismana Monastery, Hurezi Monastery, Polovragi Monastery, many wooden churches – the oldest is St. Paraschiva from Marița Village etc), traditional houses, civic constructions especially in urban areas, but also statues and monuments (the well-know sculptural ensemble of Constantin Brâncuși: The Table of Silence – The Gate of the Kiss – The Endless Column). It is necessary to mention that some constructions are in different conservations degrees, so many of them needs be protected.

2. METHODOLOGY

For the purpose of the present study, we considered two levels of analyze: first, we calculated the touristic value of each cultural heritage attraction; second, we calculated the touristic value of Oltenia's Subcarpathians localities.

For the first part of our study, the touristic value of cultural heritage, although there are many valuation methods (Șandru, I. 1970 [4]; Iordan, I., Nicolescu, E. 1971 [5]; Ciangă, N. 1998 [6]; Cocean, P. 1999 [7]) , some of them considering qualitative criteria, other quantitative criteria, there are many weakness if we want apply a method or another. This is why, in this paper, we analyzed cultural heritage value considering two different methods: on the one hand we applied tourism potential criteria [8], completed and adjusted; on the other hand we use contingent valuation method [9], consisting in heritage valuation based on questionnaires (Table 1) applied in the study area (totally, we applied almost 300 questionnaires, in Târgu Jiu, Horezu, Polovragi and Tismana, during March and April 2012). As costumer's profile, we interviewed both, men and women, aged 18 to 60 and various occupations: students, employees and retirees. Respondents had to choose a single answer for question number 1, 3 and 4; they had to name all touristic attractions they knew for second question. To the last question they could choose more answers, between those listed, or they could propose other answers.

Finally, the both methods were combined and we obtained the touristic value for each attraction, based on attraction, interest, complexity, knowledge degree, accessibility, infrastructure, preservation degree.

Table 1. Principal items of field questionnaires

	Question	Answer
1	Do you travel for tourism purposes?	a) yes b) no
2	Do you know any anthropic tourism attraction in this area? Which of them?
3	How do you appreciate the attractiveness of (<i>touristic objective name</i>)....., considering its touristic value?	a) very high attraction b) high attraction c) medium attraction d) low attraction
4	Do you think that(<i>touristic objective name</i>)..... has:	a) international importance b) national importance c) county importance d) local importance
5	For what reasons do you think it worth to visit (<i>touristic objective name</i>).....?	a) for its architecture b) for its religious importance c) for its scientific value d) for its historical value e) for its ethnographical value f) for relax reasons g) others:

First, basing on observation sheets, we applied a set of evaluation criteria, like the attraction, the interest, the accessibility and the infrastructure, each of them with four value levels, and also the preservation, with three value levels. Each element received a specific score, according their characteristics. Second, after questionnaires processing, each elements received a score for their attraction, interest, complexity and knowledge degree. The last, each element received the final score, as a result of direct observation (for accessibility, infrastructure and preservation degree), or after questionnaires processing (complexity and knowledge degree) or both direct observation and questionnaires processing (attraction and interest).

For the second part the touristic value of Oltenia's Subcarpathians localities, basically we considered valuation criteria proposed by Ielenicz M. and Comănescu Laura (2009): national and international interest objective's number index, accessibility index, distance to the great towns index, touristic services quality index, but for objectives attraction, we considered more appropriate to calculate the average between touristic values of cultural heritage attractions. Finally, the touristic value of localities was calculated as a sum of indices above listed.

3. RESULTS AND DISCUSSIONS

Cultural heritage touristic value

As we have shown previously, Oltenia's Subcarpathians area has a large and varied range of cultural heritage elements, which can become touristic objectives, if they are well exploited and promoted. In the study area we identified 184 cultural heritage objectives, belonging to all cultural heritage objectives categories, but in this paper, were analyzed the most important from each one, considering the criteria proposed by Ielenicz M. and Comănescu L., 2009 (Table 2).

Attraction degree was calculated considering the score from observation sheets and also the field questionnaires' score (Table 3). The final score was calculated using the formula:

$$Atr. = \frac{Sos + \frac{S1+S2+...+Sn}{n}}{2} : Atr. - \text{attraction degree}$$

Sos. – observation sheet score

S1, S2... Sn – questionnaire score

n – number of applied questionnaire

We gave 1 to 5 points for each element: 5 points for very high attraction, 3 points for high attraction, 2 points for medium attraction and 1 point for low attraction. For a clear distinction between high and very high attraction we eliminated from value scale 4 points value. For example, Sculptural Ensemble of Constantin Brâncuși finally obtained maximal score due to the 5 points from observation sheet and 4.20 points from field questionnaires (4.60 points average). Constantin Brâncuși Memorial House obtained 3 points from observation sheet and 3.30 from field questionnaires (3.15 points average). A great difference between field observation and field questionnaires we remark analyzing the Traditional Architecture Museum from Curtișoara (including Cornoiu Cula). It obtained 5 points from observation sheet, but only 2.60 points from questionnaires, result an average of 3.80 points, so high attraction.

Objective	Attraction				Interest				Complexity				Knowledge				Accessibility				Preservation				Infrastructure				T				
	A	B	C	D	A	B	C	D	A	B	C	D	A	B	C	D	A	B	C	D	A	B	C	D	A	B	C	D					
Sculptural Ensemble of Constantin Brâncuși, Târgu Jiu	5				5				3				5				5				5				5								33
Wooden Church St. Paraschiva, Marița	5				3				3							1			2		5								1	20			
Constantin Brâncuși Memorial House, Hobița		3			3				3				3							1	5							2	20				
Măldărești Museum Complex, Măldărești	5				5				3				3						3		5							2	26				
Tudor Vladimirescu High School Building, Târgu Jiu		3			3						2				2		5				5						3		23				
One Oak Monastery, Frâncești		3			3				3				3						2		5						2		21				
Hurezi Monastery, Horezu	5				5				3				5							1	5						3		27				
Lainici Monastery, Bumbești-Jiu	5				5				3				5				5				5						3		31				
Polovragi Monastery, Polovragi	5				5				3				5							1	5						3		27				
Tismana Monastery, Tismana	5				5				3				5						2		5						3		28				
Traditional Architecture Museum, Curtișoara		3			3				5				3				5				5						3		27				
Women Cave Archeological Site, Baia de Fier		3			3				3				3							1	3						2		18				

Table 2: Cultural heritage valuation criteria

Interest degree was calculated in the same way, as an average between direct observations score and field questionnaires score. Also, the objectives received 1 to 5 points, in this way: 5 points for international interest, 3 points for national interest, 2 points for county interest, 1 point for local interest. Mostly, observation sheet score accorded with field questionnaires score, so some cultural heritage elements like Sculptural Ensemble of Constantin Brâncuși, Wooden Church St. Paraschiva, Măldărești Museum Complex, Hurezi Monastery, Lainici Monastery, Tismana Monastery, Polovragi Monastery received 5 points (international interest objectives) and other cultural heritage elements like Constantin Brâncuși Memorial House, Traditional Architecture Museum, Tudor Vladimirescu High School Building or One Oak Monastery received 3 points, being considered national interest objectives.

For tourism *complexity*, we gave 5 points for more than 3 types of tourism, 3 points for 3 types of tourism, 2 points for 2 types of tourism and 1 point for 1 single type of tourism. This evaluation criterion was based only on field questionnaires applied to

tourists. The results shows that generally they are performed 3 types of tourism for the majority of cultural heritage objectives, so they received 3 points, excepting the Traditional Architecture Museum from Curtișoara, which received 5 points and Tudor Vladimirescu High School Building, which received 2 points.

Table 3. The answers at questionnaire principal items

	Atraction (%)				Interest (%)				Complexity (%)*						
	very high	high	med	low	international	national	county	local	arch. value	relig. value	scient. value	historic value	etnogr. value	relax reason	other
Sculptural Ensemble of Constantin Brâncuși, Târgu Jiu	65	26	9	0	66	34	0	0	98	0	0	0	0	15	12
Wooden Church St. Paraschiva, Marița	52	38	8	2	12	54	29	5	88	78	0	0	0	0	12
Constantin Brâncuși Memorial House, Hobița	31	37	27	5	13	62	21	4	11	0	0	0	19	0	21
Măldărești Museum Complex, Măldărești	53	31	16	0	56	26	17	1	79	0	0	0	21	20	0
Tudor Vladimirescu High School Building, Târgu Jiu	12	63	19	6	4	49	26	21	45	0	0	0	0	0	11
One Oak Monastery, Frâncești	23	57	17	3	21	63	13	3	70	80	0	0	10	0	0
Hurezi Monastery, Horezu	58	42	0	0	56	41	3	0	80	80	0	0	70	0	15
Lainici Monastery, Bumbesti Jiu	54	40	6	0	49	46	5	0	73	82	0	0	0	0	18
Polovragi Monastery, Polovragi	54	39	7	0	52	43	5	0	84	79	0	0	0	0	11
Tismana Monastery, Tismana	57	41	2	0	48	48	4	0	81	81	0	0	53	0	9
Traditional Architecture Museum, Curtișoara	11	38	40	11	12	43	31	14	70	0	0	12	82	28	5
Women Cave Archeological Site, Baia de Fier	23	63	11	3	21	58	18	3	0	0	85	29	0	19	0

* at the complexity item respondents could choose more answers

The *knowledge degree* of cultural heritage elements was also quantified after field questionnaires were applied; the results show that many objectives, like Sculptural Ensemble of Constantin Brâncuși or Women Cave are well known, but they are many objectives less known (Wooden Church St. Paraschiva and others).

For accessibility index, we considerate necessary to rate the objectives considering the road class they are situated on, so we gave 5 points for those objectives which have

access or are situated nearby European Roads, 3 points for those nearby National Roads, 2 point for county road and 1 point for communal road. For our particular examples of cultural heritage objectives they received 5 points those situated in Târgu Jiu City (Tudor Vladimirescu High School Building, Sculptural Ensemble of Constantin Brâncuși) and also Traditional Architecture Museum from Curtișoara and Lainici Monastery, due to their position on European Road E79. In the same time, Constantin Brâncuși Memorial House, Hurezi and Polovragi Monasteries, Women Cave Archeological Site received only 1 point because they are situated on communal roads.

Preservation is a criterion that we considered very important for an impartial valuation of cultural heritage. The score awarded was 5 points for those elements very well preserved, 3 points for those well preserved and 1 point for a weak preservation. For our specific cultural heritage elements, the score was maximal due their very well preservation degree, observed during fieldwork.

The last valuation criteria is about general infrastructure and other touristic facilities, not only for cultural heritage objective itself, but for entire area in which it is situated. We considered here the accommodation, food and beverage units, entertainment units and also shopping centers and tourism information points. In this case, Sculptural Ensemble of Constantin Brâncuși received the maximal score due to its position in Târgu Jiu City, with many touristic facilities.

After partial valuating cultural heritage, they have been calculated final touristic value of cultural heritage objectives, using the formula:

$$Tv = Atr. + Int. + Compl. + Know. + Acces. + Pres. + Facil. :$$

Tv – touristic value of cultural heritage elements

Atr. – attraction degree

Int. – interest degree

Compl. – complexity, according the number of tourism types

Know. – knowledge degree

Acces. – accessibility

Pres. – preservation degree

Facil. – infrastructure and touristic facilities

For our particular examples, touristic value varies between 18 points (Women Cave Archeological Site) and 33 points (Sculptural Ensemble of Constantin Brâncuși). However, in all Oltenia's Subcarpathians area, the touristic values are very various, beginning with 7

points (Fortified settlement from Polovragi), the lowest values being those of archeological site, especially because they are not known enough and they are not attractively for lot of people.

If we analyze the touristic value of Oltenia's Subcarpathians cultural heritage map (figure 2) we will see a large spread of medium touristic value objectives, 10 to 20 points, generally churches, both wooden churches and outside painted churches, but also traditional houses from the 19th and 20th centuries. High touristic value have many objectives from Târgu Jiu, Traditional Architecture Museum from Curtișoara, Măldărești Museum Complex, but also the well known monasteries from Tismana, Horezu, Lainici, Polovragi.

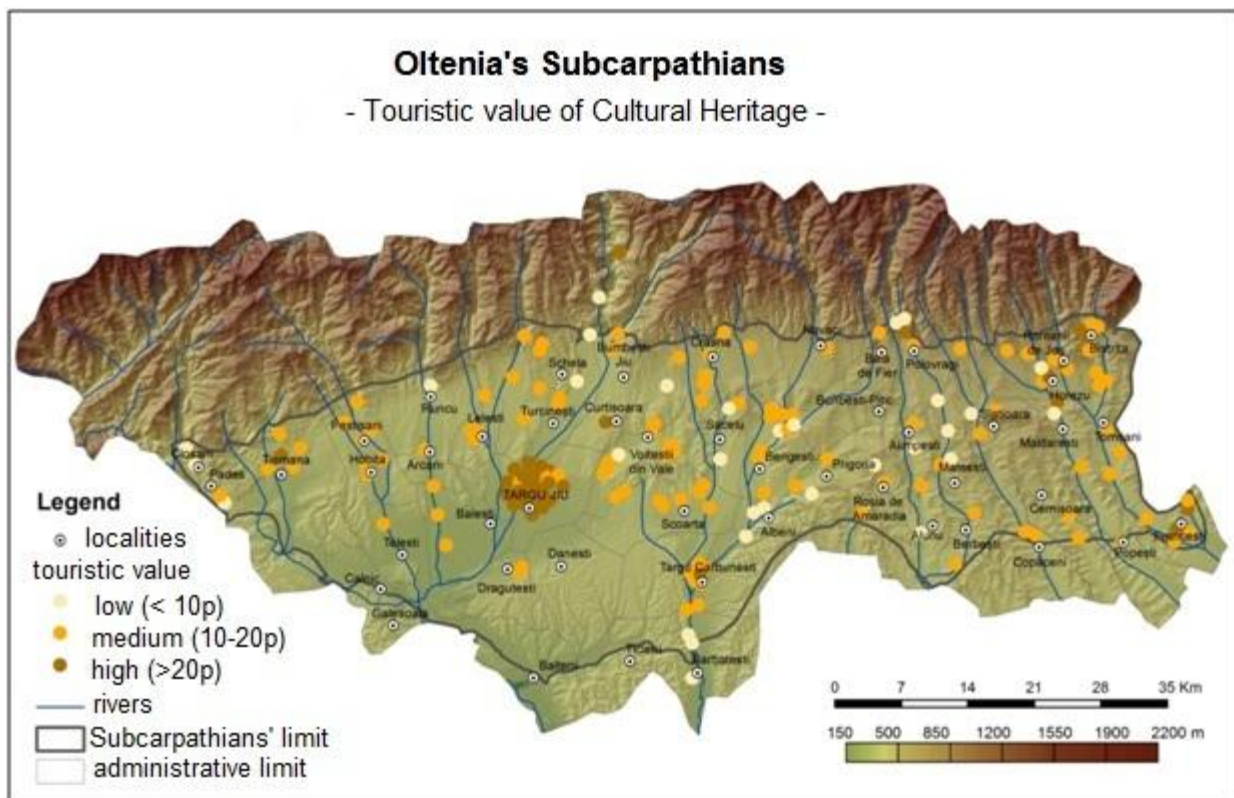


Figure 2. Touristic value of Oltenia's Subcarpathians Cultural Heritage

Tourism attractiveness of Oltenia's Subcarpathians localities, considering cultural heritage

For a better assessment of cultural heritage, it is not important an individual valuation of each element, but a valuation of entire area in which they are, so it is necessary a complex valuation of tourism attractiveness, considering many indexes, such as distance

to great cities, tourism services quality, and also touristic value of cultural heritage. In this case we estimated the touristic attractiveness of localities, using the formula¹:

$$Ta = Tva + In + Iacc + Id + If :$$

Ta – tourism attractiveness of Oltenia’s Subcarpathians localities

Tva – touristic value average

In – national and international interest objective’s number index

Iacc – accessibility index

Id – distance to the great cities index

If – tourism facilities quality index

In Oltenia’s Subcarpathians there are 51 administrative units, cities and villages, the first of them, considering tourism attractiveness value being presented in the table 4. As we mentioned, for tourism attractiveness we considered as first index, the average of cultural heritage touristic value; the highest score in this case was obtained by Târgu Jiu thanks to its numerous cultural heritage objectives with a great touristic value. High values for this index were obtained also by some localities, which have few cultural heritage objectives but they have very high touristic importance (Horezu, Măldărești, Bumbești-Jiu).

For national and international interest objective’s number index, the maximal score was 5 points for more than 15 national and international interest objectives, next 3 points for 10 to 15 national and international interest objectives, 2 points for 5 to 10 objectives, 1 point for less than 5 objectives and 0 for no national and international objectives. The only locality which obtained the maximal score was Târgu Jiu, thanks its 18 objectives appreciated as national and international interest; Horezu town obtained 2 points and the other localities obtained 1 or 0 points.

For accessibility index, we offered 5 points for localities with crossed by international roads, 3 points for those crossed by national roads, 2 points for those crossed by county roads 1 point localities crossed by local roads. The highest score was obtained by Târgu Jiu and Bumbești-Jiu, due to their situation on E79 Road, while the other localities received fewer points, because they have access at national or county and communal roads.

¹ Adjusted from Ielenicz, M., Comănescu, Laura, 2009,

Table 4. Tourism attractiveness valuation criteria for localities considering cultural heritage

<i>No.</i>	<i>Localities</i>	<i>Tva</i>	<i>In</i>	<i>Iacc</i>	<i>Id</i>	<i>Is</i>	<i>Total</i>
1	Târgu Jiu	22.6	5	5	2	5	39.6
2	Horezu	19.14	2	3	3	2	29.1
3	Bumbești - Jiu	18.3	1	5	2	2	28.3
4	Tismana	17.83	1	3	2	2	25.8
5	Măldărești	17.5	1	3	3	0	24.5
6	Costești	16.3	1	3	3	1	24.3
7	Polovragi	13.75	1	3	3	2	22.8
8	Peștișani	14.7	1	3	2	2	22.7
9	Berbești	15.5	1	2	2	2	22.5
10	Frâncesti	16.4	1	2	3	0	22.4
11	Baia de Fier	15	1	2	3	1	22
12	Novaci	15	0	2	2	3	22
13	Oteșani	17	0	3	2	0	22
14	Vaideeni	17	1	2	2	0	22
15	Târgu Cărbunești	16.16	0	3	2	0	21.2

A significant importance has the distance to great cities index; it means great urban areas, with more than 100 000 inhabitants. According this criterion, 5 points receive the localities situated at less than 10 km from this area, 3 points receive the localities situated at 10 to 50 km from, 2 points for localities situated at 50-100 km and 1 point for those situated at more than 100 km from great urban areas. For determine this index, we considered Râmnicu Vâlcea, Craiova and Drobeta Turnu Severin cities, the closest urban area to Oltenia's Subcarpathians. Because none of our localities is situated at less than 10 km from these cities, none of them receive 5 points, but 3 points were obtained by Măldărești, Costești, Baia de Fier, Polovragi, Frâncesti, because they are situated at less than 50 km from Râmnicu Vâlcea.

The quality of tourism facilities offered in each locality was an another criterion for valuation the tourism attractiveness, so we gave 5 points for very good services, 3 points for good services, 2 points for medium quality services, 1 point for poor quality and 0 points for the lack of tourism facilities. Târgu Jiu received 5 points thanks its great numbers of accommodation units of diverse categories and also different entertainment possibilities.

After partial scores were given, and the total scores were calculated, in Oltenia's Subcarpathians area have been established three locality categories (Figure 3). High tourism attractiveness localities are Târgu Jiu, Tismana, Bumbești-Jiu, Novaci, Polovragi,

Horezu, Frâncești, Târgu Cărbunești, especially due their high cultural heritage touristic value and also their good accessibility. Low attractiveness localities are situated in south-west part, at contact with Getic Plateau (Godinești, Călnic, Țicleni, Bălteni, Dănești); this situations is done by the lack of cultural heritage objectives with great touristic importance and also because the lack of touristic facilities. However, the largest category is that of medium tourism attractiveness localities (Padeș, Runcu, Lelești, Arcani, Schela, Mușetești, Slătioara, Alimpești, Tomșani etc), thanks of their great number of touristic objectives with local and county importance, but also due their tourism facilities less good than high category localities.

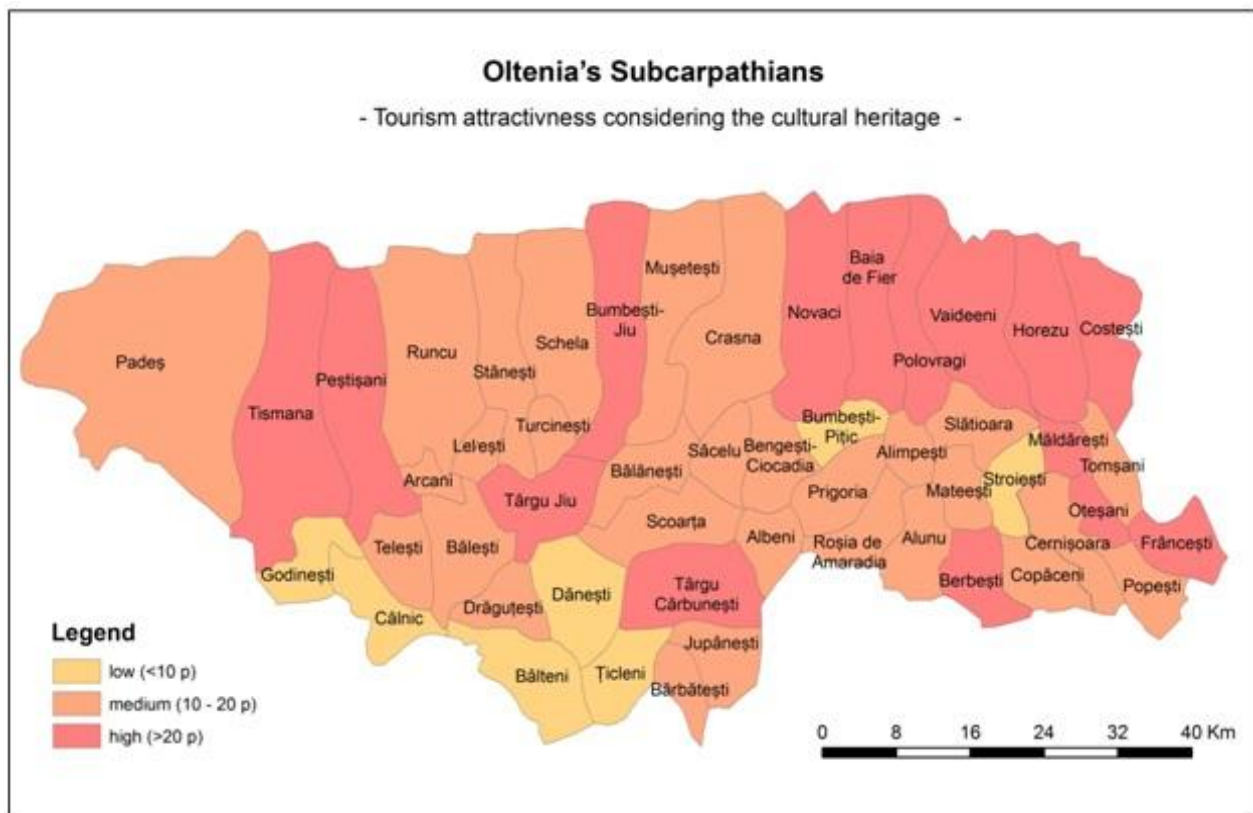


Figure 3. Tourism attractiveness of localities, considering cultural heritage

4. CONCLUSIONS

Oltenia's Subcarpathians area has a wide and varied range of touristic objectives (civic buildings, traditional houses including cula buildings, churches and monasteries, statues and memorial monuments, museums, archeological sites) belonging to the cultural heritage, most of them recognized nationally and internationally. For an area touristic development we have to know the touristic value of those elements, for take the best decision in touristic development strategies. The touristic value of cultural heritage can be determined for each

objective, but the tourism attractiveness of entire localities is strongly recommended. The results show that there are many cultural heritage elements which can be used in tourism development, but their touristic value is reduced because they are not well known and also because the accessibility or the tourism facilities are not enough good. However, the concentration or contrary, the dispersion cultural heritage objectives, the infrastructure and facilities, the accessibility lead to individualization of high or low tourism attractiveness zones.

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