



# The European Experience with an Emphasis on France



# SUMMARY

## Introduction

### Presentation of private historical buildings in Europe

#### ➤ Focus on France

- « La Demeure Historique » private historical buildings owners association
  - creation
  - development
- Find a sustainable economic model: from land ownership to innovative economic entity : what opportunities for private historical monuments?
  - Build the future
    - The next gen program
    - Embody the past to define the future







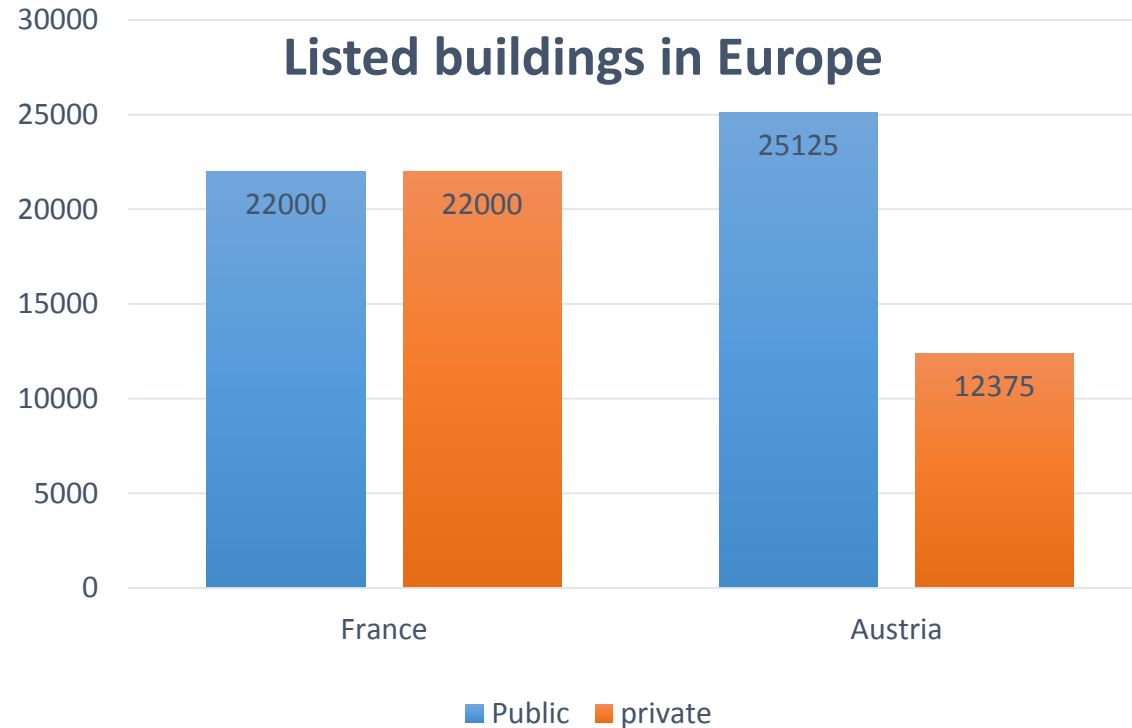
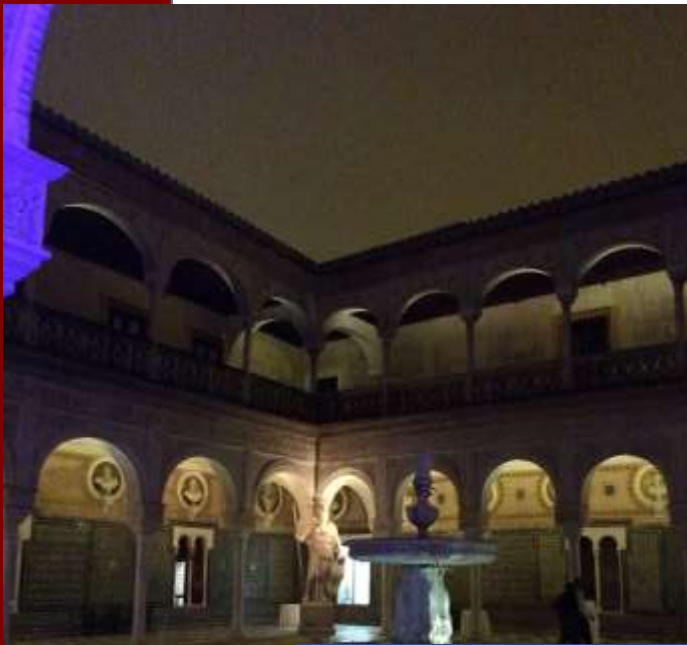
## Between protection and support: the European legislative systems

- An existent legislation for the protection of historic buildings (not standardized)
  - Each country has built his own system
- Three pillars to protect and support private historical buildings:
  - Inventory
  - Protective law (control over the works)
  - Funding (Tax incentives/ Subsidies)
- The protection applies to furniture in some countries

# State of the protection: some key figures

The criterias of listed buildings vary from one member state to another.

Some member state are very vigilant on the protection of movable objects and archaeological remains.





# Financial support



Country	Type of funding
Austria	Optional and partial funding for conservation, restoration and research: Tax benefit Income tax: depreciation of investment
Greece	Subsidies Tax benefits for donations of cultural property or money: <ul style="list-style-type: none"><li>- Tax exemptions from real estate taxation for certain categories of buildings of architectural heritage</li><li>- Beneficiaries are owners of buildings dating more than 100 years and which are classified as monuments by special Acts of the Ministry of Culture and Sports Ibid.</li></ul>
Netherlands	Only for national scheduled monuments: <ul style="list-style-type: none"><li>- Grants for maintenance (€50 million/year) and for redevelopment of disused historic buildings (€2.4 million/year) + others</li><li>- Tax relief: exemption for landowners if estate has been intact for 25 years and opens the grounds to the public for inheritance and transfer</li><li>- deduction of restoration costs for listed buildings and country estates from Income Tax</li><li>- Restoration fund-mortgage from the National Restoration fund with a low rent for monuments</li></ul>

# Action: Europe's Private Heritage week

## Put the difference on the front of the stage!

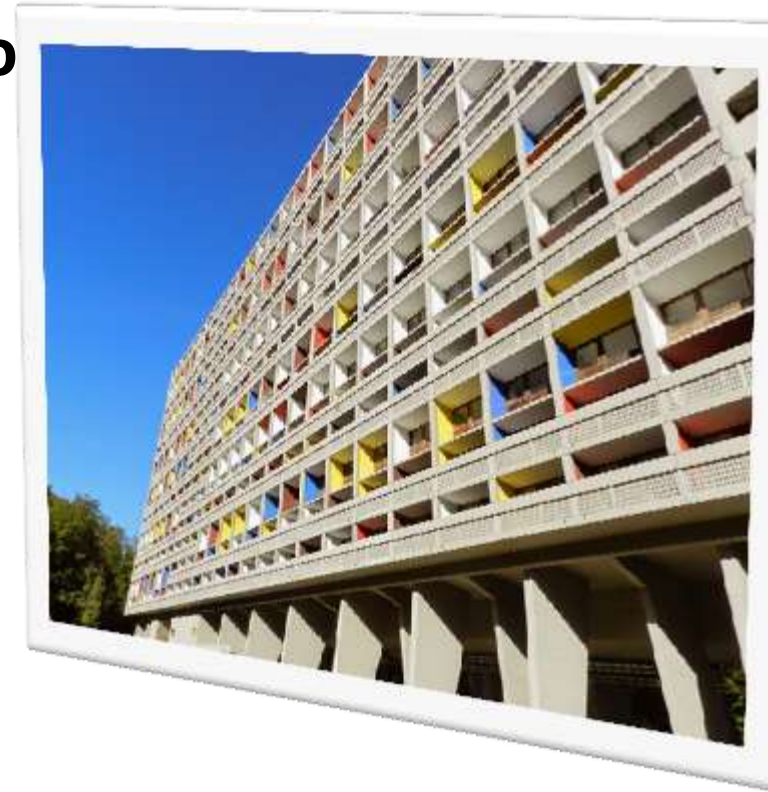
- European initiative to promote the singularity of private historical buildings
- Owners all over Europe organized activities during the week
- One aim: have more political influence in the European Commission





# France

- 50% of listed historical buildings in France belong to private owners
- Private and public historical buildings : one goal but two different languages
- A lot a diversity





## French financial support

- State subsidies for restoration of listed buildings, objects or registered under the name of '*Monuments historiques*'
- Tax deductions (incomes) for work and maintenance by the owners
- Transfer tax exemption in return for opening to the public and no transfer for a fee



# A bit of history...



- Joachin Carvallo and a few castle owners dreaming about sharing their house with the public in the earlier 20's created "La Demeure Historique"





# The Group Demeure Historique

## Demeure Historique

- Association created in 1924
- State-approved in 1965
- Technical advice (legal, social, tax)
- Lobbying

## Foundation of Historic Monuments

- Foundation created in 2008
- Vocation to:
  - ❖ Safeguard and restore public and private listed buildings
  - ❖ Transmit the ancestral artistic know-how by actively supporting students and research in art and heritage fields
- State-approved in 2018

## Employers group

- Association created in 2014
- Pools labour needs
- Open to owners of listed buildings
- Turn-Key solution to facilitate and encourage employment



# Main achievements thanks to the lobbying work

- **1964: Incomes tax incentives**
- **1988: transfer duties convention**
- **1994, 2002, 2004: improvement of the tax incentives system**
- **2006: creation of a device facilitating the division of inheritance**
- **2007: private historical buildings can benefit of philanthropy at certain terms**
- **2011: large-scale economic study**
- **2016: approval as an association for the protection of the environment**



# The main activities

Training program (law, funding, business..)



Legal and technical advice  
(tax labour law, security and accessibility standards, funding....)

Network everywhere  
in France  
-local connections  
-sharing experience  
in the field







## How it works?

- A dream team with lawyers
- A charismatic president
- An energetic lobbying
- A recognized expertise



# NEXT GEN PROGRAM



- Development of the national group
- Part of the european program
- Development of the « young new owner » reward, organized every year by the Foundation of Historic Monuments in partnership with two private sponsors





**Find a sustainable economic  
model:  
from land ownership to  
innovative economic entity :**

**what opportunities for  
private listed buildings?**





# Challenges

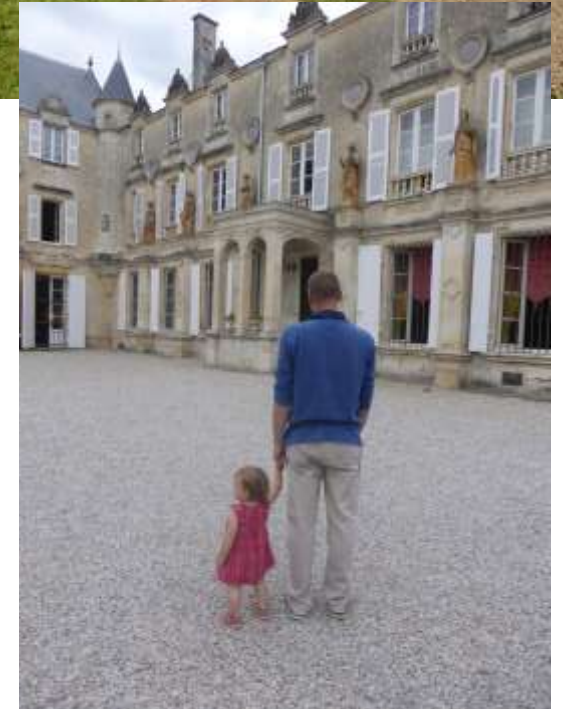
- 1000 historical buildings on sale
- Few viable projects
- Subsidies down
- binding security and accessibility standards
- Landscapes threatened by urbanization or implantation of wind turbines
- Transmission issues





# Transmission Issues

- Increasing difficulties to find new owners and projects
- Search for alternative solutions:
  - Transmission throw a fondation
  - Creation of a professional training dedicated to historic monuments management





## **solutions**

- **Develop private funding**
- **Build new economic models**
- **Anticipate the transmission issues**
- **Being part of the so called “new world”**



# Former economic models are no longer an option

Owners must become entrepreneurs

➤ Funding must come from the monument itself or from private initiatives



# Funding

## New financial tools:

- Crowdfunding
- Philanthropy
- Through **La Demeure Historique**, since 2008 :
  - €5,6 million collected for 145 projects
- Through the **Foundation of Historic Monuments**, since 2009 : €1,2 million distributed for
  - Restauration
  - Accessibility for disabled public
  - Students in art and research
  - From 2009 to 2016 : over 100 monuments and 50 students concerned





# Developing new activities



Challenge koh Lanta







## Adopt the code of an enterprise:

- Innovative offer
- Digital transition
- Corporate governance





# Communication is a key

- Social networks
- A determined offer
- Building dream around the house



## Château de Panloy

5.0 (61 avis) N° 2 sur 4 choses à voir à Port d'Envaux Châteaux, Sites et monuments  
3 domaine de panloy, 17360 Port d'Envaux, France +33 5 46 91 73 23 Site Web Enregistrer

### Points forts des avis

\*Visite décontractée des vieilles pierres et de l'impressionnante continuité malgré les ajouts et les transformations. Très agréable visite où la... lire la suite



sady91 Avis publié il y a 11 jours  
sady91, Longueville, France

\*Visite du château de nuit "soirée château hanté". Nous avons visité le château de nuit. Il est hanté par les fantômes de l'époque... lire la suite



Renee Armande C Avis publié il y a 1 semaine

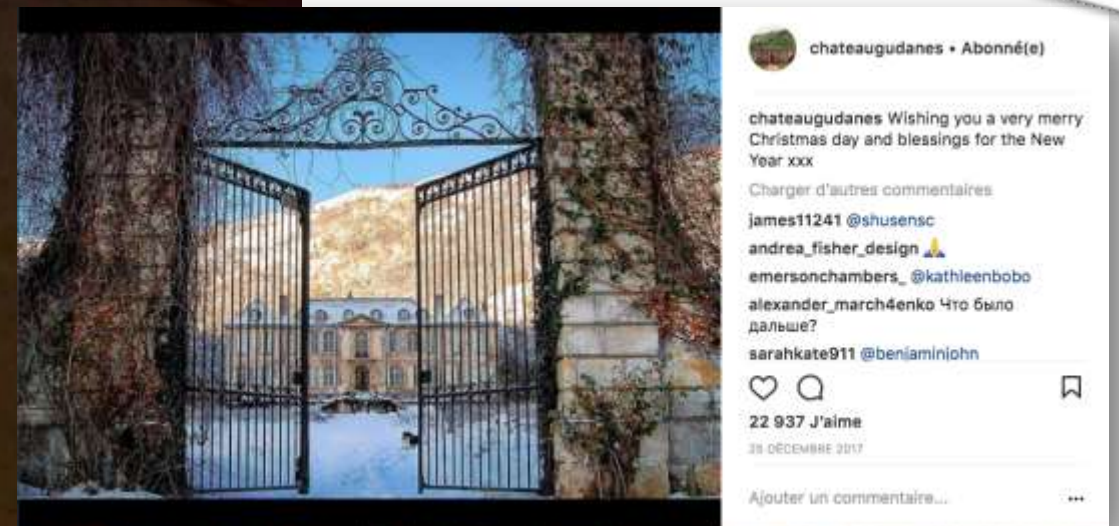
Lire les 61 avis



Toutes les photos (36)







**Build a community around the project**



Create the event!







Create the event!





# Getting Media support



A photograph of a person standing on the left side of a cave, holding a book or tablet, addressing a group of people seated on the right. The cave's interior is dark, while the entrance on the right reveals a bright, sunlit landscape with green hills and a cloudy sky. The text "Put some dream in every aspect of the project!" is overlaid on the right side of the image.

Put some dream in  
every aspect of the  
project!



# CARMEN

21 Juillet  
20H00

Opéra en plein air  
Château de Linières  
Ballée (53)

Direction musicale: Benoît Willmann  
Direction artistique: Julien Ostini

www.linières.org / Château de Linières - LEZ-BO BALLÉE - VAL-DU-MAINE - Route d'Épaignes-de-Aygnon / 48.061.671.051







**Being part of an amazing human  
adventure!**



**Thank you for your attention..**

