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**Public - Private - People Partnerships in
Mexico: Active citizen engagement for
sustainable cultural heritage
management**

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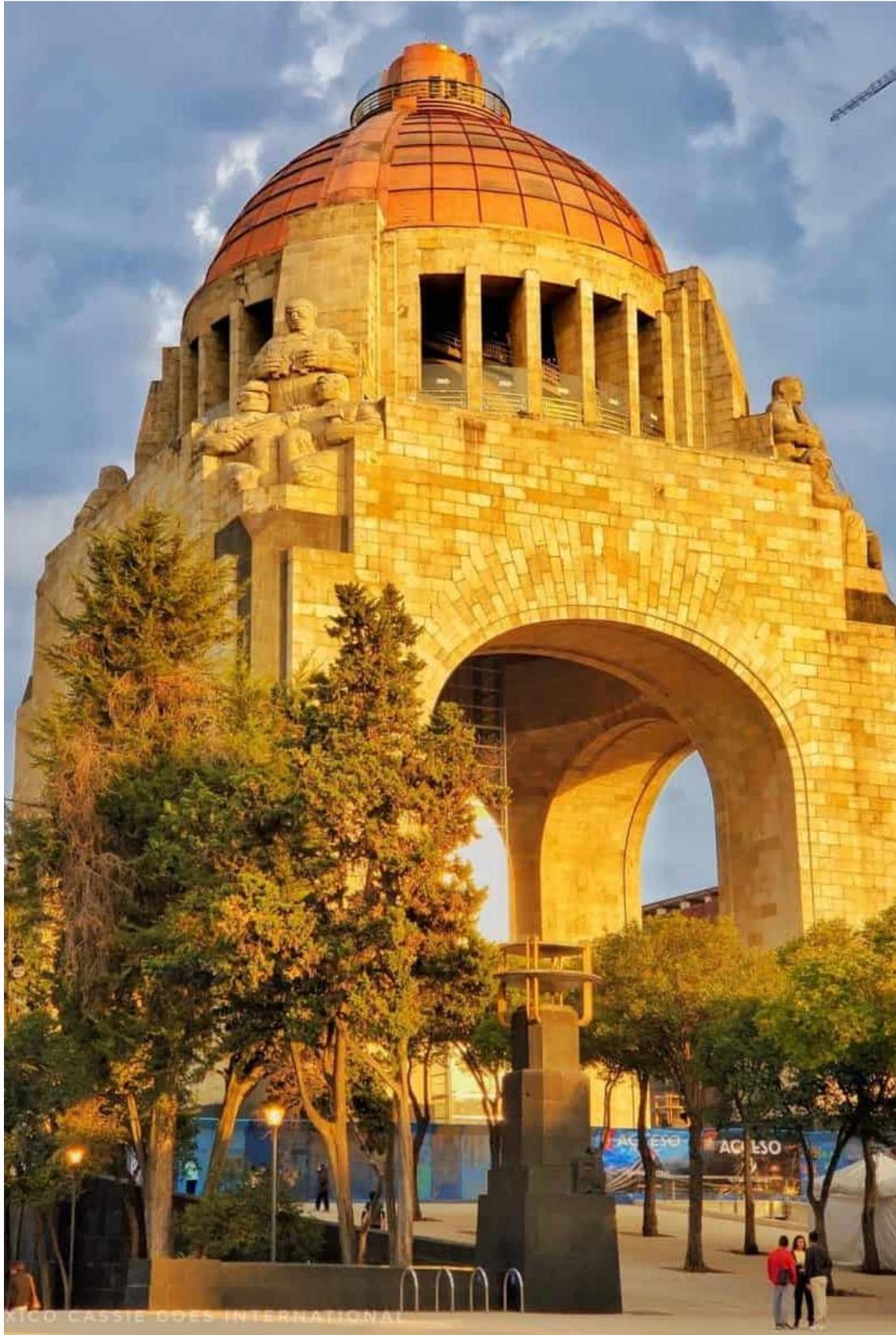
*Figure 1. Bird View of the Palacio de Bellas Artes in Mexico City
(Wilson, 2022)*

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Figure 2. Casa de los Azulejos with a Catrina Chiapaneca
(Unknown, 2020)

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*Figure 3. Monumento a la Revolución, Mexico City
(Unknown, 2020)*

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*Figure 4. People agree on a national reform to attend their social issues
(Mexico, 2019)*

Abstract

This thesis examines the role of Public-Private-People Partnerships (P4) in the sustainable management of cultural heritage properties in Mexico, focusing on active citizen engagement. The study addresses the challenges faced by public administrations in preserving cultural heritage due to limited resources. By exploring the legal and theoretical frameworks, the research highlights the potential of P4 models to integrate cultural, economic, social, and environmental considerations, thereby enhancing the sustainability of heritage management.

The research involves a comprehensive analysis of the current state of public cultural heritage management in Mexico, including the involvement of private and third-sector organizations. It utilizes ten case studies primarily from Oaxaca, presenting both successful and unsuccessful collaborations in cultural heritage projects. The data collection methods include the examination of official documents and interviews with stakeholders such as historians, archaeologists, public officials, community leaders, and non-profit organizations.

Findings suggest that P4 models can effectively mitigate economic risks, improve operational efficiency, and foster community engagement. The study underscores the need for clearer legal frameworks and better coordination among stakeholders to enhance the efficacy of these partnerships. The research contributes to the understanding of how participatory approaches can lead to more sustainable and inclusive management of cultural heritage, offering practical recommendations for policy and practice.

Keywords

public-private-people partnerships; cultural heritage management; sustainable development; citizen engagement; mexico; public administration; case studies; legal frameworks.

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Figure 5. Facade of the temple of Santo Domingo de Guzman
(Victoria, 2020)

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Glossary

Item	Definition
Core Public Services	This concept refers to the services provided by governmental entities to meet the basic need of citizens and ensure the functioning of society. For the purpose of this thesis, we will refer to 9 of them: (1) Public Administration, (2) Defence, (3) Environmental Protection, (4) Justice System, (5) Social Services, (6) Infrastructure, (7) Public Safety, (8) Healthcare, and (9) Education. (Shittu, 2020)
Cultural heritage	The Faro Convention defines cultural heritage as “[...] a group of resources inherited from the past which people identify, independently of ownership, as a reflection and expression of their constantly evolving values, beliefs, knowledge, and traditions. It includes all aspects of the environment resulting from the interaction between people and places throughout time” (Council of Europe, 2005).
End-users	End users are the individuals or groups who ultimately use or benefit from a product, service, or system. They are the final recipients of the end product, distinct from developers, manufacturers, or intermediaries involved in the earlier stages of the production or service delivery process. In the context of software, for example, end users are the people who use the software to perform specific tasks, rather than the people who design, create, or sell the software. (Shittu, 2020)
Faro Convention, 2005	The Faro Convention was an event promoted by the Council of Europe held in Faro, Portugal in 2005. The Council of Europe Portal reports, the convention “[...] emphasizes the important aspects of heritage as they relate to human rights and democracy. It promotes a wider understanding of heritage and its relationship to communities and society. The convention encourages us to recognize that objects and places are not, in themselves, what is important about cultural heritage. They are important because of the meaning and uses that people attach to them and the values they represent”. (Council of Europe, 2023).
Hangzhou Declaration	It is entitled as “Placing Culture at the Heart of Sustainable Development Policies”, and it is the official report of the 2013 UNESCO International Congress, “Culture: key to sustainable development” held in Hangzhou, China. The document “aims to provide international and national policy makers, and development actors at large, with a clear statement on why and how culture is critical for achieving sustainable development.” (UNESCO, 2013).
Management approach, Bottom-up	The European commission defines it as “an approach that allows the local community and local players to express their view and to help define the development course for their area in line with their own views, expectations and plans” (European Commission, 1991).
Management approach, Top-down	It is a management strategy “in which the decision-making process occurs at the highest level and is then communicated to the rest of the team” (Asana, 2024).
Management, Asset	According to ISO 55000:2014, Asset management is the “coordinated activity of an organization to realize value from assets. [...] it will normally involve a balance of costs, risks, opportunities, and performance benefits.” (International Organization for Standardization, 2014).
Management, Facility	As defined by ISO, Facility management is defined as an “organizational function which integrated people, place, and process within the built environment with the purpose of improving the quality of life of people and the productivity of the core business” (Standardization, 2017).
Management, Property	As defined in the EU regulation No. 1042/2013, Article 31. a. (2). (o), “property management, [...], [consists] of the operation of [...] real estate by or on behalf of the owner of the property.” (Council of the European Union, 2013). The Taxation and Customs Union of the European Union later explains in the document titled Explanatory notes on EU VAT place of supply rules on services connected with immovable property that enter into force in 2017, that property management services include “the administrative services provided to ensure the proper running, maintenance, and use of immovable property. Typically, these services consist in coordinating supervision, cleaning, and maintenance of the property, collecting rents, keeping record, and managing payments of on-going expenses, advertising the property, enforcing the terms of the lease, taking contract

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	for the mitigation and resolution of conflicts between the property owner and service suppliers and/or tenants.” (Taxation and Customs Union of the European Union, 2015).
P3	Public - private partnership.
P4	Public - private - people partnership.
Participatory planning	In this paper, participatory planning refers to public planning processes in which people take an active role in the development of the project. Marcus B. Lane explains that in planning, “participation of the [...] community [is] integral to the planning method, but an important goal is to decentralize planning institutions by empowering people to direct and control social processes which determine their welfare” (Lane, 2005, p. 293).
Public Property	As defined by the Legal Information Institute at the Cornell Law School, “public property refers to property owned by the government (or its agency), rather than by a private individual or company. It belongs to the public at large. Examples include many parks, streets, sidewalks, libraries, schools, playgrounds that are used regularly by the general public” (Wex Definitions Team. Legal Information institute, 2022).
Third sector	According to Lester M. Salamon and S. Wojtek Sokolowski, “the third sector consists of private associations and foundations; non-commercial cooperatives, mutuals and social enterprises; and individual activities undertaken without pay or compulsion primarily to benefit society or persons outside of one’s household or next of kin” (Salamon & Sokolowski, 2015).
Engagement	It refers to the active participation and involvement of stakeholders, particularly citizens, in the decision-making processes, management, and implementation of projects related to public cultural heritage. This concept is integral to the Public-Private-People Partnership (P4) model, which emphasizes the collaboration between public authorities, private entities, and the community to achieve sustainable outcomes. (Macey, Schneider, Barbera, & Young, 2009)
Civic Engagement	This involves the involvement of citizens in public life and governance, where they have the opportunity to influence decisions that affect their communities. Civic engagement is characterized by activities such as voting, attending town meetings, participating in public consultations, and being involved in local governance. (Skocpol & Morris, 1999)
Democratic Civic Engagement	It refers to the active participation of citizens in the democratic processes and governance of their communities and societies. It emphasizes the role of individuals in shaping decisions, policies, and initiatives that affect public life, ensuring that governance is inclusive, transparent, and accountable. This form of engagement is rooted in the principles of democracy, where the power and legitimacy of government derive from the participation and consent of the governed. (de Tocqueville, 2002)
Management, Sustainable	It refers to the administration and coordination of resources, practices, and operations in a way that meets current needs without compromising the ability of future generations to meet their own needs. This approach integrates cultural, economic, environmental, and social dimensions to ensure long-term viability and resilience. (Hoffman, 2001)
PREM	Abbr. of Public Real Estate Management. It involves the strategic administration, operation, and oversight of real estate assets owned or controlled by government entities. These assets include a wide range of properties such as government buildings, schools, hospitals, parks, infrastructure, and historical sites. The goal of PREM is to ensure that these assets are used efficiently, maintained properly, and contribute to the public good. (Lizundia, Fernandez-Monge, & Silva-Mendez, 2015)

Abbreviations by category

Abbreviations

P3: Public - Private Partnerships.....	passim
P4: Public - Private - People Partnerships	passim
PA: Public administration	passim

Other Authorities

AMLO: Andres Manuel López Obrador, Mexican president 2018-2024	23
CONACULTA: Consejo Nacional para la Cultura y las Artes de México.....	33
FONADIN: Fondo Nacional de Infraestructura	154
FONATUR: Fondo Nacional de Fomento al Turismo	passim
GPA: U.K. Government Property Agency	15
GSA: U.S General Services Administration	16
ICCROM: International centre for the study of the preservation and restoration of cultural property	passim
ICOM: International Council of Museums	27, 30
ICOMOS.....	27, 29, 30
INBAL: Instituto Nacional de Bellas Artes y Literatura	passim
MLIT: Japan's Ministry of Land, Infrastructure, transport, and tourism	17
NLC: Kenya's National Land Commission	18
PSPC:Public Services and Procurement Canada	16
SEDENA: Secretaria de Defensa Nacional de Mexico	23
SEP: Secretaria de Educación Publica de Mexico	33
SHCP: Secretaria de Hacienda y Credito Público de México	24
UNESCO: United Nations Educational, Scientific and Cultural Organization ...	passim

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Figure 6. Indigenous woman
(Gobierno de Mexico, 2019)



Figure 7. Sketch of indigenous people taking decisions
Elaboration of the author

Chapter 1

1 Introduction

1.1 Background and rationale

In recent years, there have been studies which explore the need of the public administration (PA) to deliver core public services and manage public property, especially cultural heritage. The PA typically struggles to achieve these goals because of the limited resources (financial, economic, human and knowledge resources) with which they operate.

This study explores different approaches to manage public built cultural heritage, with a focus on sustainable management. Specifically, it will be argued that by adopting a Public – Private – People partnership (P4), a more solid strategy can be developed which not only addresses economic factors but also cultural, social and environmental. By engaging in these P4, the PA can transfer economic risks, obtain significant knowledge, operate buildings and projects smoothly, in addition to financing of such projects.

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Regarding Public – Private Partnerships (P3), research conducted in Mexico has found that there are discrepancies in the definition of P3 in the legal context which has led to the regulation of such agreements from different points of view; for example, the first approach to these types of projects surfaced in 1995, called Long-Term Productive Infrastructure Projects (Proyecto de Inversión de Infraestructura Productiva con Registro Diferido en el Gasto Público, PIDIREGAS) mainly operating in the energetic industry. Projects for Service Provision (Proyectos para la Provision de Servicios, PPS) were the following iteration of a public-private agreement surfacing in 2004, being regulated by 3 different legal instruments: (1) "Agreement establishing the rules for the execution of projects for service provision," (2) "Public Sector Procurement, Leasing, and Services Law" (Ley de Adquisiciones, Arrendamientos y Servicios del Sector Público, LAASSP) and (3) the "Federal Budget and Fiscal Responsibility Law" (Ley Federal De Presupuesto Y Responsabilidad Hacendaria, LFPRH) (Acosta Perez, 2019). Today P3 are regulated by the 2012 Law, but there is still ambiguity in terms of pluriannual budgets, the duration of contracts and risks distribution. Furthermore, P3 are only regulated at a federal level and only when they involve federal resources.

When it comes to P3 for the management of cultural heritage, Mexico has no specific law to regulate these projects. Although there are many projects that involve private and non-profit institutions in this sector, they have not been studied at a systematic level as P4.

1.2 Research objectives

The objective of this research is to expose the current situation of how Public Cultural heritage is managed in Mexico, including the support of private and third sector organisations both at a national and international level.

There is a notable gap in the academic and practical literature concerning the implementation and impact of P4s for cultural heritage conservation in Mexico. While various models of public-private collaboration have been explored globally, the specific dynamics involving community engagement, shared governance, and the sustainable management of cultural heritage through P4s in the Mexican context remain under-researched. This lack of literature highlights a critical area for further investigation, particularly given Mexico's rich and diverse cultural heritage.

The research also aims at bringing to the surface programs at a federal level that could facilitate the management of cultural heritage in Mexico by local communities, such as FOREMOBA.

1.3 Research Problems

Effective public real estate management faces several key challenges. These include a lack of detailed information, as many governments struggle with incomplete or outdated data on their assets. Weak institutional coordination among various government entities further complicates management efforts. Additionally, burdensome regulations can restrict efficient management practices.

- **Lack of Detailed Information:** Many governments struggle with incomplete or outdated information about their real estate assets, making it difficult to manage them effectively.
- **Weak Institutional Coordination:** Effective public real estate management requires coordination among various government entities, which is often lacking.
- **Burdensome Regulations:** Complex and restrictive regulations can hinder the efficient management of public properties.
- **Measuring Non-Financial Returns:** Quantifying the social and public interest outcomes of public real estate management remains a challenge.
- **Lack of financial resources for the management of cultural heritage sites:** Although Mexico has many programs to fund the rescue of built cultural heritage many sites across the country still struggle to have enough resources to manage efficiently their buildings.
- **Measuring non-financial returns,** such as social and public interest outcomes, remains difficult, hindering the evaluation of broader impacts

1.4 Research questions

The following questions surfaced before and during the research for this thesis:

How can the inclusion of private entities ensure a more sustainable management of public cultural heritage in Mexico?

What are the implications of establishing or mandating that public cultural heritage projects in Mexico go through a deliberative democratic process?

How to best preserve historical sites while allowing them to remain active parts of community life?

1.5 Research method

The research explores the current national situation of management of public real estate, public cultural heritage, and different engagement types between the public, the private and the third sector in Mexico. Furthermore, it will illustrate the laws and regulations that govern relationships in P3 or P4. The methodology used for this research has the following structure:

Research design and approach.

The research will be divided into 3 sections: (1) a theoretical framework which will focus on the Management of Public Real Estate in Mexico and in selected countries from each continent, the Management of Cultural Heritage at an international and national level, and Sustainable Management of Public Cultural Heritage which will discuss Public – Private Partnerships and Public – Private – People Partnerships (P4); (2) the existing legal framework on Archaeological, Artistic and Historical Monuments, and on Public – Private Partnerships which mainly affect infrastructure projects, and the legislative framework for P4 for Cultural Heritage in Mexico; (3) case studies analysis focusing on nine sites that have gone through P3 or P4 models of management, most of them in the Mexican state of Oaxaca, except for 2 projects. The cases will include sites of the pre-Colombian and Columbian era; in some cases, the collaboration has been successful and in others it has not.

Data collection. The data is collected through the analysis of official documents published through the official websites of the competent authorities, in addition to interviews with historians, Archaeologists, Public officials, community leaders and non-profit organizations.

Scope and limitations. Because this is an *in-media res* case presentation, a limitation is that it is not possible to identify and/or measure all impacts these projects have produced. Therefore, it is suggested to perform the same assessment to identify, categorize and compare the impacts on a yearly basis, in addition to studying how users interact with the property and the property's transformation.

The case studies were selected based on their relevance to the themes of this research and their representation of diverse management approaches. Data was collected through:

Chapter 1 Introduction
Section 1.5 Research method

- **Document Analysis:** Reviewing official documents, reports, and publications from relevant authorities and organizations.
- **Interviews:** Conducting interviews with key stakeholders, including historians, archaeologists, public officials, community leaders, and representatives from non-profit organizations.
- **Site Visits:** Performing site visits to observe the conditions and management practices firsthand.

1.6 Outline of the thesis

Chapter 2 will provide the theoretical framework on how public property and Cultural heritage is managed in the International and Mexican context while looking into different strategies of management of public property, specifically models of engagement between the Public Sector, the Private sector, and People. The first model to be introduced is the *Public - private partnership* (P3), referring to any mutually advantageous agreement between a public administrative organism and private companies for the management of public assets. The second model is the *Public - private - people partnership* (P4), an evolution to the P3 approach, aimed at the involvement of third sector institutions with non-profit aims as one of the main goals to develop sustainable public projects. This idea derives from Deliberative Democratic theory¹, which emphasizes how designing and delivering public services needs to be centred around end-user satisfaction through their inclusion in discussions or *deliberation processes* with decision makers, and not only as mere voters who choose among a set of options (Bächtiger, Dryzek, & Mansbridge, 2018).

Chapter 3 presents the current legal framework on Cultural heritage, where it will be described the definition of the different types of cultural heritage, public organisms in charge of their protection and management, and other provisions. It will also present the current Federal Law on P3 in Mexico, including a brief history since their appearance in the country, as well as a description of the most relevant articles.

Chapter 4 presents some recent projects that give insight into the current situation of P3 and P4 for the management of Cultural heritage in Mexico, but all being collaborations between public, private and third sector entities.

Chapter 5 synthesizes the findings of the thesis, drawing together insights from the theoretical framework, legal analysis, and case studies to provide a comprehensive overview of the effectiveness and potential of Public-Private-People Partnerships (P4) in the sustainable management

¹ A distinction must be made between Deliberative democratic theory and Democratic theory which will be detailed in following chapters.

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Section 1.6 Outline of the thesis

of cultural heritage in Mexico. It concludes that Public-Private-People Partnerships offer a viable and promising approach for the sustainable management of cultural heritage in Mexico. However, their success depends on supportive legal frameworks, effective community engagement, and continuous evaluation and adaptation of strategies.



Figure 8. Indigenous People participating in a community meeting
(Ponce, 2018)

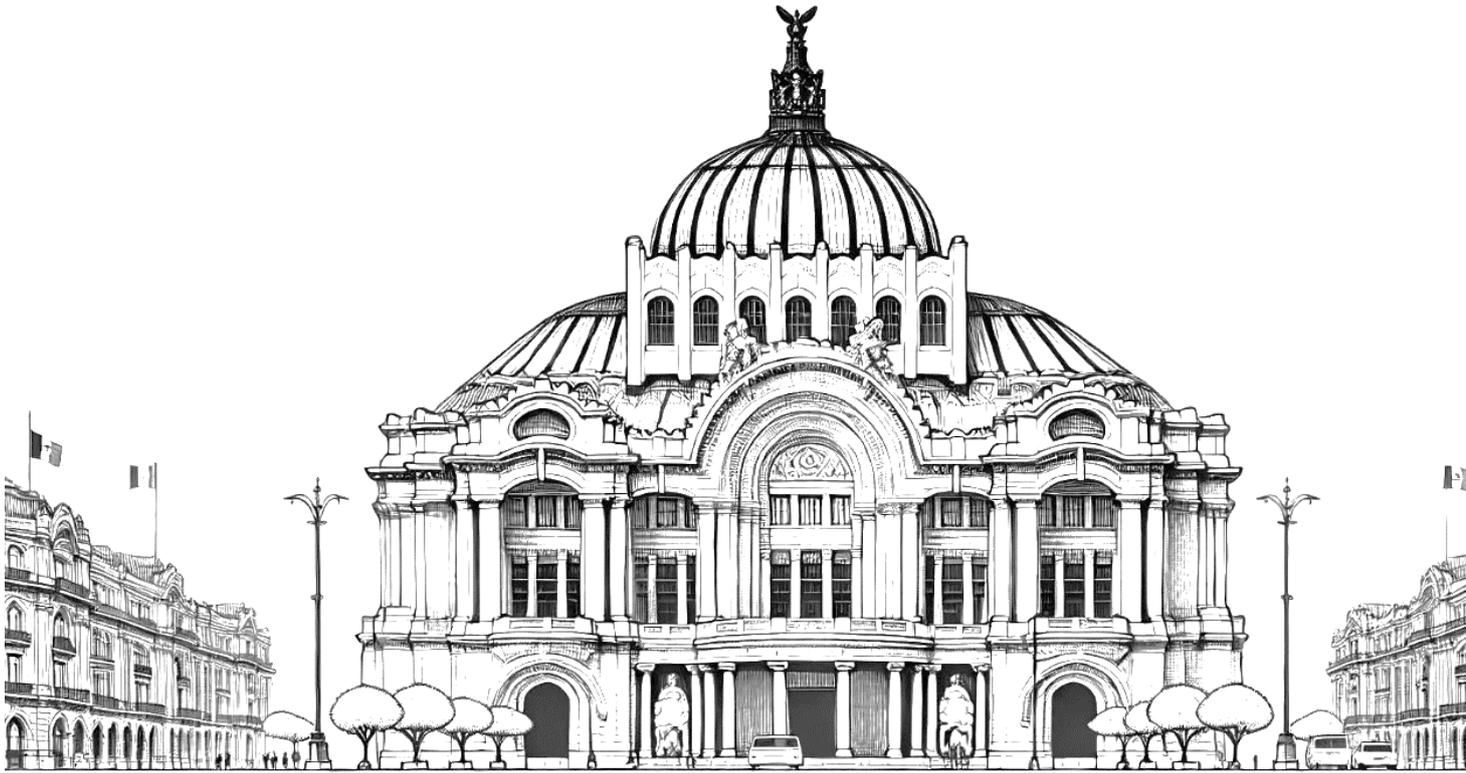


Figure 9. Sketch of an imaginary building
Elaboration of the author

Chapter 2

2 Theoretical framework

The management of public real estate, particularly cultural heritage, presents unique challenges and opportunities. As countries grapple with the dual objectives of preserving cultural heritage and ensuring sustainable development, various strategies have been proposed and implemented. This chapter delves into the theoretical underpinnings of public real estate management and explores the international and Mexican contexts, focusing on the roles of different sectors—public, private, and third sectors—in these efforts.

Public real estate management (PREM) involves the oversight, administration, and optimization of government-owned properties, including lands, buildings, and infrastructure essential for public services. Effective PREM is crucial for ensuring that public assets are used efficiently, sustainably, and in ways that maximize public value.

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This study examines at a superficial level the practices of public real estate management across different countries, highlighting both common challenges and unique approaches.

Cultural heritage management involves preserving and promoting historical and cultural assets. Various international organizations, such as the *International Centre for the Study of the Preservation and Restoration of Cultural Property* (ICCROM) and *International Council on Monuments and Sites* (ICOMOS), play crucial roles in this field. In Mexico, institutions like the *National Institute for Anthropology and History* (Instituto Nacional de Antropología e Historia, INAH) and the *National Institute for Fine Arts* (Instituto Nacional de Bellas Artes y Literatura, INBAL) are responsible for conserving and promoting the nation's archaeological, anthropological, and historical heritage.

Sustainable management of public cultural heritage requires balancing conservation and development. Cultural heritage can significantly contribute to sustainable development by fostering economic growth, social cohesion, and environmental sustainability (Moioli, 2015). This chapter explores different models of engagement, including Public-Private Partnerships (P3) and Public-Private-People Partnerships (P4), which emphasize the importance of involving private entities in the management process.

The theoretical framework presented in this chapter provides a comprehensive understanding of the complexities and strategies involved in managing public real estate and cultural heritage. By examining international practices and the specific context of Mexico, this chapter sets the stage for a deeper exploration of legal frameworks and case studies in subsequent chapters, highlighting the potential of innovative partnerships and sustainable management practices.

2.1 Management of Public Real Estate

Public real estate represents a significant portion of national wealth in many countries. Proper management of these assets is vital for ensuring that they contribute effectively to public service delivery, economic development, and fiscal sustainability. However, the approaches to managing these assets vary widely due to differences in governance structures, economic contexts, and cultural values. This thesis explores these variations and the underlying principles guiding public real estate management in Europe, North America, Asia, Africa, and Latin America.

2.1.1 International Level

2.1.1.1 Europe: Efficiency and Sustainability

In some European countries, public real estate management often emphasizes efficiency, sustainability, and adapting to demographic changes. Germany, for example, has a well-developed system for managing its extensive public real estate portfolio, which includes properties owned by federal and state governments, municipal administrations, and public organizations. The country faces challenges such as digitization, demographic shifts, and the need for climate-friendly practices. KPMG Germany highlights the importance of optimizing real estate portfolios to positively impact the cost and earnings of the administrative budget. This involves a strategic approach that includes active real estate management and modernization of government asset registries (KPMG, n.d.)

Another example is the United Kingdom, where public real estate management is integrated into broader public sector reforms aimed at improving efficiency and reducing costs. The Government Property Agency (GPA) plays a key role in managing the central government's property portfolio, focusing on rationalization and better utilization of space to support public service delivery (Pöll, 2012).

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2.1.1.2 North America: Transparency and Strategic Management

In North America, particularly in the United States, public real estate management is characterized by a focus on transparency, strategic asset management, and leveraging private sector practices. The U.S. General Services Administration (GSA) oversees the federal government's real estate portfolio, which includes office buildings, courthouses, and land. The GSA employs a balance sheet perspective to gain a complete picture of government finances, facilitating better decision-making regarding the acquisition, utilization, and disposal of properties. This approach helps address fiscal constraints by optimizing the use of existing assets without requiring significant new investments (Lizundia, Fernandez-Monge, & Silva-Mendez, 2015).

Canada also follows a strategic approach to managing public real estate, emphasizing sustainability and the efficient use of resources. Public Services and Procurement Canada (PSPC) manages a large portfolio of federal properties, focusing on reducing the environmental impact and improving the efficiency of public buildings through initiatives like the Federal Sustainable Development Strategy (Pöll, 2012).

2.1.1.3 Asia: Rapid Development and Infrastructure Focus

In Asia, public real estate management often aligns with rapid urbanization and infrastructure development needs. China, for instance, has a significant amount of public land and buildings managed by various levels of government. The focus is often on supporting urban development, economic growth, and providing public services such as education and healthcare. The Chinese government actively engages in land leasing and development projects to ensure that public real estate contributes to national economic objectives (Pöll, 2012) (KPMG, n.d.).

Japan, facing an aging population and limited land resources, emphasizes the efficient use of urban space. The Ministry of Land, Infrastructure, Transport and Tourism (MLIT) plays a crucial role in managing public real estate, focusing on urban redevelopment and optimizing the use of public lands to support sustainable city planning and disaster resilience (KPMG, n.d.).

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**2.1.1.4 Africa: Addressing Informality and
Enhancing Governance**

In Africa, public real estate management is often challenged by issues such as informal settlements, rapid urbanization, and weak institutional frameworks. Countries like Kenya and South Africa are working to improve their public real estate management systems to better support urban development and public service delivery.

In Kenya, the National Land Commission (NLC) is responsible for managing public lands, addressing issues related to land tenure, and ensuring that public real estate is used effectively to support national development goals. Efforts are being made to enhance transparency, strengthen land registries, and address historical land injustices (Lizundia, Fernandez-Monge, & Silva-Mendez, 2015).

South Africa's approach includes a focus on redistributing land to address historical inequalities and ensuring that public real estate assets are used to promote social and economic development. The Department of Public Works and Infrastructure oversees the management of government properties, aiming to optimize their use and contribute to the country's development objectives (KPMG, n.d.).

2.1.1.5 Latin America: Integrating Public Asset Management with Governance

In Latin America, public real estate management is increasingly being integrated into broader governance and public financial management reforms. Countries like Brazil and Colombia have started to adopt comprehensive strategies to manage their public real estate assets more effectively.

In Brazil, initiatives in states like Rio de Janeiro focus on improving the management of public properties to support fiscal sustainability and public service delivery. This includes better asset registration, valuation, and strategic planning to ensure that public real estate contributes to overall governance goals (Lizundia, Fernandez-Monge, & Silva-Mendez, 2015).

Colombia has also made strides in enhancing public real estate management through reforms aimed at improving institutional coordination and transparency. By strengthening the legal and regulatory framework, the country aims to optimize the use of public assets and ensure they contribute to national development objectives (Lizundia, Fernandez-Monge, & Silva-Mendez, 2015).

2.1.1.6 Common Challenges and Best Practices

Despite the differences in context and approach, several common challenges and best practices emerge from the study of public real estate management across different continents. Common challenges include:

- **Lack of Detailed Information:** Many governments struggle with incomplete or outdated information about their real estate assets, making it difficult to manage them effectively.
- **Weak Institutional Coordination:** Effective public real estate management requires coordination among various government entities, which is often lacking.
- **Burdensome Regulations:** Complex and restrictive regulations can hinder the efficient management of public properties.
- **Measuring Non-Financial Returns:** Quantifying the social and public interest outcomes of public real estate management remains a challenge.

To address these challenges, several best practices can be identified:

1. **Developing Comprehensive Strategies:** Governments should define clear public real estate management strategies that outline vision, objectives, and implementation plans.
2. **Strengthening Institutional Frameworks:** Clarifying roles and responsibilities and enhancing coordination among government entities is crucial for effective management.
3. **Improving Productivity:** Adopting private sector practices such as active demand management and strategic policy for buying, selling, and managing assets can enhance productivity.
4. **Enhancing Transparency:** Modernizing and professionalizing asset registries, valuations, and management practices can improve transparency and ensure that the true value of public assets is realized.

Public real estate management is a critical component of good governance and public financial management. While the approaches and challenges vary across different countries and continents, the underlying principles of efficiency, transparency, and strategic management are universally applicable. By adopting best practices and addressing common challenges, governments can ensure that their public real estate assets contribute effectively to national development goals and public service delivery.

2.1.2 National Level

2.1.2.1 Mexican system for the administration of public property

The administration of assets in Mexico is a multidimensional endeavor, involving various levels of governance, including federal, state, and municipal authorities, each tasked with managing real estate assets. However, until the early 21st century, obtaining accurate and comprehensive data regarding the total number of properties under the purview of each governmental department and entity at the federal level posed significant challenges. Factors such as geographical location, utilization, and specific characteristics of these assets were often obscure and fragmented.

The establishment of the Institute for the Administration and Valuation of National Goods (INDAABIN) in 2004, marked a pivotal moment in enhancing transparency and efficiency in asset management within the Mexican governmental framework. A subsidiary of the Ministry of Public Function, INDAABIN was created to address the shortcomings in asset management and valuation practices prevalent at the time (Victoria-Marin & Soto-Alva, 2015).

INDAABIN's institutional objectives underscore its pivotal role in the management of real estate assets at the federal and parastatal levels. These objectives include:

1. Providing legal certainty to federal and parastatal real estate assets.
2. Promoting the efficient control and utilization of these assets.
3. Ensuring the continuous updating of regulatory frameworks governing real estate policies.
4. Issuing timely and transparent appraisal reports.
5. Strengthening institutional capacities in alignment with the principles of republican austerity (INDAABIN, 2022).

Central to INDAABIN's mandate is the management of the Federal and Parastatal Real Estate Inventory System (SIPIFP), as mandated by Article 32 of the General Law of National Goods (LGBN). This system serves as a comprehensive registry, cataloging all real estate properties owned by the federation and parastatal institutions. Over the years, the data captured by this system has revealed a consistent trend of growth in the total quantity of properties, underscoring the dynamic nature of

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governmental asset portfolios. This can be observed in *Figure 10. Total quantity of assets registered in the INDAABIN.*

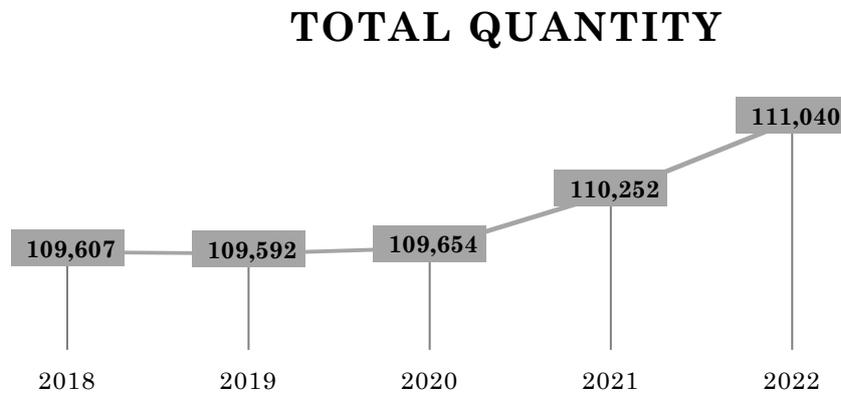


Figure 10. Total quantity of assets registered in the INDAABIN
With information from (INDAABIN, 2022)

Analysis of the data further reveals interesting insights into the utilization patterns of these properties. Among the myriad uses identified, religious purposes emerge as the most prevalent across the five-year period under consideration, as observed in *Figure 11. Assets registered in the INDAABIN, classified by use.* This trend highlights the diverse range of functions that government-owned real estate assets serve within the societal fabric, reflecting the intricate interplay between governance, culture, and community needs (INDAABIN, 2022).

The significance of INDAABIN's efforts extends beyond mere administrative functions. By fostering transparency, efficiency, and accountability in the management of real estate assets, INDAABIN plays a pivotal role in promoting good governance practices and fostering public trust in governmental institutions. Moreover, the institution's emphasis on capacity-building ensures that stakeholders are equipped with the necessary skills and knowledge to navigate the complexities of asset management in an ever-evolving landscape (INDAABIN, 2022).

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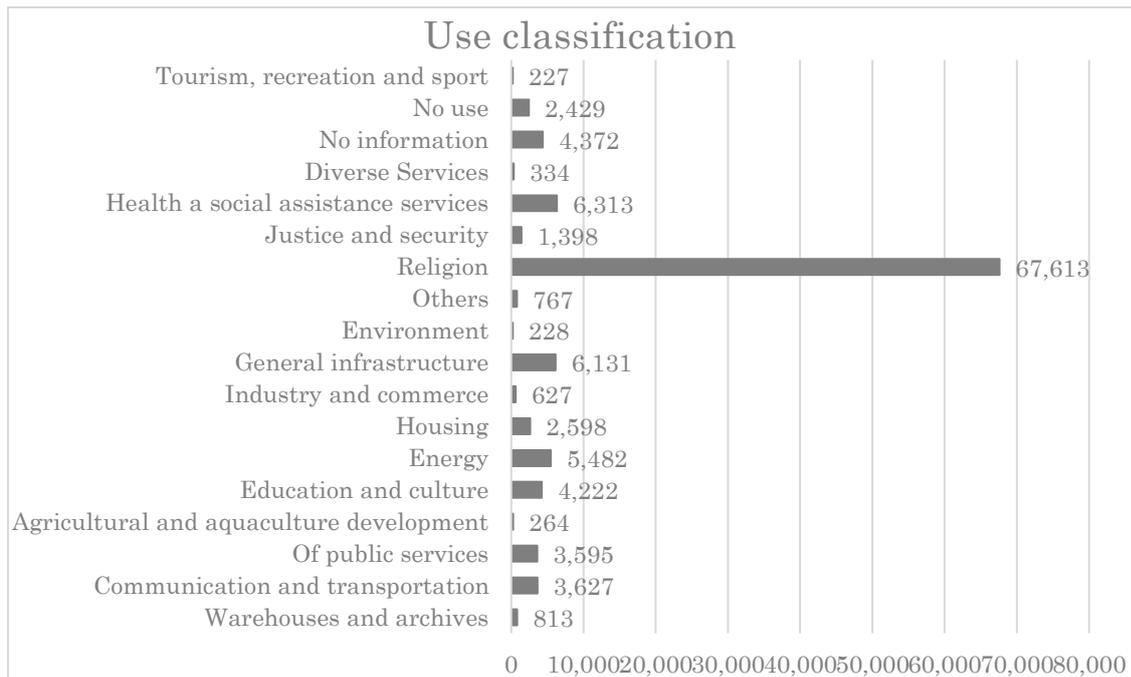


Figure 11. Assets registered in the INDAABIN, classified by use.

With information from (INDAABIN, 2022)

As is it seen in Figure 10. Total quantity of assets registered in the INDAABIN, a great portion of the assets are related to religion, of which, a good portion of them were built during the colonial period, which makes it a promising asset for cultural heritage tourism projects.

Recent investigations (Escalante, 2023) have shown that there are information disparities between the PA’s institutions that manage property. For example, the Universities for the Wellbeing Benito Juarez (Universidad para el Bienestar Benito Juarez), a public university founded and promoted by Mexican President Andres Manuel Lopez Obrador (AMLO), has said that they will have approximately 200 campuses by the end of the AMLO government (December 2024); but according to public information, this university does not have in their ownership one single real estate asset. Another example is the “Banco del Bienestar”, who in their website reported that they only administer 20 assets, but the National Defence Ministry (SEDENA) reports the bank has 2,749 branches.

In the performance audit 12-0-27A00-07-0322, the authority determined that in 2012 INDAABIN did not maintain their databases up to date and pointed out that only 20% were registered in the Public Registry of Federal Property (RFPP), meaning that 82,118 (80%) properties were not registered. It also identified that the historical backlog revealed that in

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2012, the SIPIFP was not reconcilable with the Government Accounting System (SCG) of the Ministry of Finance and Public Credit (SHCP). According to (Victoria-Marin & Soto-Alva, 2015) the “lack of systematization and linkage of data in the Federal and Para-state Real Estate information system has led to the absence of updated inventories of federal properties and their proper reconciliation with accounting goods”.

In the state of Oaxaca, the Direction of heritage (Dirección de patrimonio, in spanish) in the Ministry of Administration is in charge of having a register and managing the real estate assets. In their last report made in 2019 a total of 346 were registered in their catalogue, being composed of 320 regular real estate properties, 18 catalogued as artistical, historical or archaeological, and 8 being property of the Federation but destined to a public service managed by the government of the state of Oaxaca (Gobierno del Estado de Oaxaca, 2021).

In a 2021 report of their financial situation, the municipality of Villa de Etla (Oaxaca) had a real estate portfolio value at 25,899,045.33 MXN (Organo Superior de Fiscalizacion del Estado de Oaxaca, 2021). Although there is a dedicated website to the transparency of the municipalities of this state, with a section dedicated to the inventory of the real estate assets, this particular municipality has never uploaded a file containing the number of properties in their possession, not to mention characteristics such as geographic location and area (OGAIPO, n.d.). This is information that should be available to the public and updated at least every 6 months, according to the current law.

2.2 Management of Cultural Heritage

The management of cultural heritage encompasses the protection, preservation, and promotion of cultural assets that hold historical, artistic, and social significance. This section delves into the diverse approaches and strategies employed to manage cultural heritage at various levels, emphasizing the roles of the public sector, private sector, and third sector. By exploring international practices and the specific context of Mexico, this section aims to highlight the complexities and best practices in the sustainable management of cultural heritage.

Effective cultural heritage management is not only about safeguarding the past but also about leveraging these assets for contemporary social, economic, and environmental benefits. This section examines the interplay between conservation efforts and development goals, illustrating how cultural heritage can contribute to broader sustainable development objectives. Through a comprehensive analysis of management frameworks and models, this section provides insights into the innovative approaches that can enhance the preservation and utilization of cultural heritage.

2.2.1 International level

2.2.1.1 International organizations

ICCROM: International centre for the study of the preservation and restoration of cultural property

ICCROM emerged as a consequential response to the aftermath of the Second World War, characterized by extensive cultural devastation and the imperative to reconstruct and safeguard cultural heritage. This pivotal development unfolded during the 9th Session of the UNESCO General Conference in New Delhi in 1956, where a proposal advocating for the creation of an intergovernmental center dedicated to the study and enhancement of restoration methodologies gained traction and was subsequently endorsed. (ICCROM, 2024)

Following a formal agreement with the Italian government, ICCROM was officially founded in Rome in 1959. Dr. H.J. Plenderleith, distinguished for his extensive tenure as the Keeper of the Research Laboratory at the British Museum in London, assumed the inaugural role of Director. The Centre swiftly initiated the establishment of a global network comprising experts and specialized institutions focused on the conservation and restoration of diverse forms of cultural heritage. Operating in close collaboration with UNESCO, ICCROM actively engaged in international initiatives and spearheaded scientific missions aimed at assisting Member States. Noteworthy early endeavors included initiatives such as the preservation of ancient tombs in the Nile Valley, restoration of mural paintings in Moldovan churches, establishment of a national conservation research center in India, and provision of assistance for safeguarding cultural heritage in the wake of natural disasters such as floods or earthquakes in Guatemala, Italy, and Montenegro. (ICCROM, 2024)

During the early 1960s, ICCROM embarked on its pioneering efforts in education by organizing its initial courses focusing on the conservation of historic towns and structures, conducted in partnership with the University of Rome. Subsequently, the Centre introduced a series of annual courses covering various aspects of conservation, including mural paintings (in collaboration with the Istituto Centrale del Restauro in Rome, commencing in 1968), scientific principles of object and material

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conservation (1974), and preventive conservation of museum collections (1975). Additionally, ICCROM established an international library and documentation center, which has since evolved into a cornerstone resource supporting research and educational endeavors in the field. (ICCROM, 2024)

By the conclusion of Plenderleith's tenure in 1971, ICCROM had garnered membership from fifty-five states, a number that has steadily increased to encompass 137 nations. Moreover, in 1978, the Center's cumbersome title was abbreviated to ICCROM, a streamlined designation that has persisted over the years, underscoring its enduring commitment to the preservation and restoration of cultural heritage worldwide. (ICCROM, 2024)

Guided by the principles enshrined in the 2001 UNESCO Universal Declaration on Cultural Diversity, which emphasizes the pivotal role of cultural respect, dialogue, and cooperation in fostering international peace and security, ICCROM remains steadfast in its mission. (ICCROM, 2024)

With a rich legacy spanning over six decades, ICCROM has forged robust partnerships with Member States, extending invaluable support in the preservation of heritage both within their national boundaries and beyond. Operating at the nexus of international and governmental spheres, alongside grassroots institutions and practitioners, ICCROM imparts knowledge and cultivates a new generation of heritage stewards and enthusiasts. Leveraging its extensive network of conservation experts, it fosters formal institutional collaborations with esteemed entities such as UNESCO, including its Headquarters, Regional Offices, and World Heritage Committee, where ICCROM serves as an Advisory Body. Furthermore, partnerships with non-governmental organizations like ICOMOS, ICOM, ICA, and IIC, along with scientific institutes and universities in Member States, fortify its multifaceted approach to heritage preservation. (ICCROM, 2024)

Renowned professionals across various domains of heritage conservation, from scientists and conservators to museum curators and archaeologists, rely on ICCROM's exemplary initiatives in conservation training, research, cooperation, and advocacy. ICCROM innovative educational programs, tools, and materials, coupled with its extensive professional training activities worldwide, underscore its commitment to advancing conservation practices since its inception in 1956. (ICCROM, 2024)

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Section 2.2 Management of Cultural Heritage

At the heart of ICCROM's endeavors lies one of the world's preeminent conservation libraries, housing a vast repository of over 120,000 publications and specialized journals in more than seventy languages. Complementing this wealth of knowledge is ICCROM extensive collection of over 200,000 images documenting sites, objects, and training activities over the years. Furthermore, ICCROM online platform serves as a comprehensive resource, offering insights into international events and training opportunities in the field of conservation-restoration. (ICCROM, 2024)

ICCROM assumes a pivotal role in shaping the research agenda of cultural conservation institutions, facilitating knowledge exchange, and fostering collaborative environments conducive to scholarly discourse. Through its concerted efforts, ICCROM promotes international, interregional, and interdisciplinary cooperation, assembling diverse experts and institutions worldwide to provide technical guidance, education, and training, and conduct on-site assessments. (ICCROM, 2024)

Dedicated to raising awareness and garnering support for conservation and restoration efforts across all strata of society, ICCROM extends technical assistance to Member States through the dissemination of teaching materials, information sharing, workshops, and training opportunities. In doing so, ICCROM remains steadfast in its commitment to safeguarding humanity's rich cultural heritage for future generations. (ICCROM, 2024)

ICOMOS: International Council on Monuments and Sites

ICOMOS is an international organization dedicated to the promotion of theory, methodology and scientific techniques for the conservation of architectural and archaeological heritage. It has a wide network of experts around the world that work to increase the standards and techniques for preservation of diverse types of built heritage such as buildings, historic cities, cultural landscapes, and archaeological sites. Founded in 1965, it is currently present in 132 countries/territories, with more than 10,000 members, 248 institutional members, 113 national committees and 30 international scientific committees. It also serves as an advisory body of the World Heritage Committee, reviewing the nominations of cultural world heritage and ensures their conservation. (ICOMOS, 2024)

ICOMOS Mexico was established in 1965 when a select group of experts in the field of conservation in Mexico were summoned by the Secretary of Public Education Jaime Torres Bodet. This meeting took place for the purpose of emitting an opinion on the project to establish international collaboration for the conservation and restoration of monuments and sites, specifically in the dimensions of doctrine, technical, legislative and scientific. Furthermore, it was emphasized during this gathering that the Mexican chapter of ICOMOS would be legally registered as a civil association because of the non-for-profit motivations for its institution. (ICOMOS, 2024)

Today, ICOMOS Mexico stands as one of the main authorities in the subject nation-wide, as an institution whose general objective is the rescue, protection and conservation of the cultural heritage in the national territory, in order to execute the same functions and activities that ICOMOS does at an international level. It has specific goals which include but are not limited to: the creation of a network and databases of professionals specialized in the area to promote dialog and the exchange of ideas; promote the communication between specialists and the civil society through the realisation of assemblies and symposiums; to recuperate, analyse and spread information relative to the studies of the management of cultural heritage, specifically about the criteria, principles, politics and investigation techniques; promote the adoption of international agreements that aid in the management of the cultural heritage; to participate in the creation and management of catalogues,

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inventories, declarations, laws, regulations, develop studies and projects regarding the management of cultural heritage; aid in the identification, register and protection of the cultural heritage proposed or listed in the World Heritage of the UNESCO, specifically those cultural assets that in the Mexican Territory; cooperate with authorities, national and international institutions, and the civil society in the creation of specialized centres for the documentation and conservation of cultural heritage; be part of collegiate bodies, public or private, that offer services of consulting for the protection, conservation and valorisation of cultural heritage; emitting opinions regarding any action of public or private interest that concerns the protection of cultural heritage; to propose to the national and international institutions, the adoption of measures for the protection of cultural heritage in accordance to the Mexican law; promote and collaborate in the spread of campaigns of sensibilization that public or private institutions create regarding the protection of cultural heritage; act as an intermediary and advisor for authorities, institutions and the civil society, at the national and international level, public or private, in matter related to the protection of cultural heritage; create and cooperate in programs of education for specialists and the civil society in matters of protection of cultural heritage; promote ICOMOS Mexico as an authorized organism for the certification of specialists for the management of cultural heritage; offer the technical, analytic and critic capabilities of specialized professionals to the international community; establish and maintain a close relationship with UNESCO, the International Council of Museums (ICOM), ICCROM, national and regional conservation centres of the UNESCO and any other organization (public or private) that pursues the same objectives as ICOMOS Mexico; aid the authorities in the surveillance and reporting actions that can represent damage to cultural heritage and making it of public knowledge when necessary; acquire all types of movable and immovable assets, including industrial and intellectual property; engage in contracts, treaties and operations of any nature that are necessary or convenient for the realization of its goals; and, vary out any legal or material act, allowed by Mexican authorities in order to fulfil their objectives. (ICOMOS, 2024)

Regarding its structure, ICOMOS Mexico is divided in to four bodies: General Assembly, Directive Council, Technical Advisory Council, and Honour Board. In addition to these bodies, the organization also includes scientific committees, each one specialized in a specific field of cultural

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heritage: mortuary architecture and spaces, cultural tourism, historic
cities and towns, built heritage in wood, and non-material heritage.
(ICOMOS, 2024)

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National Trust (United Kingdom)

The national trust in the United Kingdom, founded in 1895, is a non-profit organization in the UK, dedicated to the preservation of the nature, beauty, and history. It is also committed to play a major role in the fight against climate change. Currently it is the biggest charity in Europe dedicated to conservation efforts. (National Trust, n.d.)

It acquires properties by donations from the owners or through the National Land Fund, currently holding more than 250,000 hectares of farmland, more than 780 miles of coastlines, and more than 500 historic properties, gardens, and natural reserves. Most properties are open to the public with a fee charged, while it is free for members of the trust.

Regarding the people involved, it currently has 5.73 million affiliated members and has around 10,000 people as staff and thousands of volunteers.

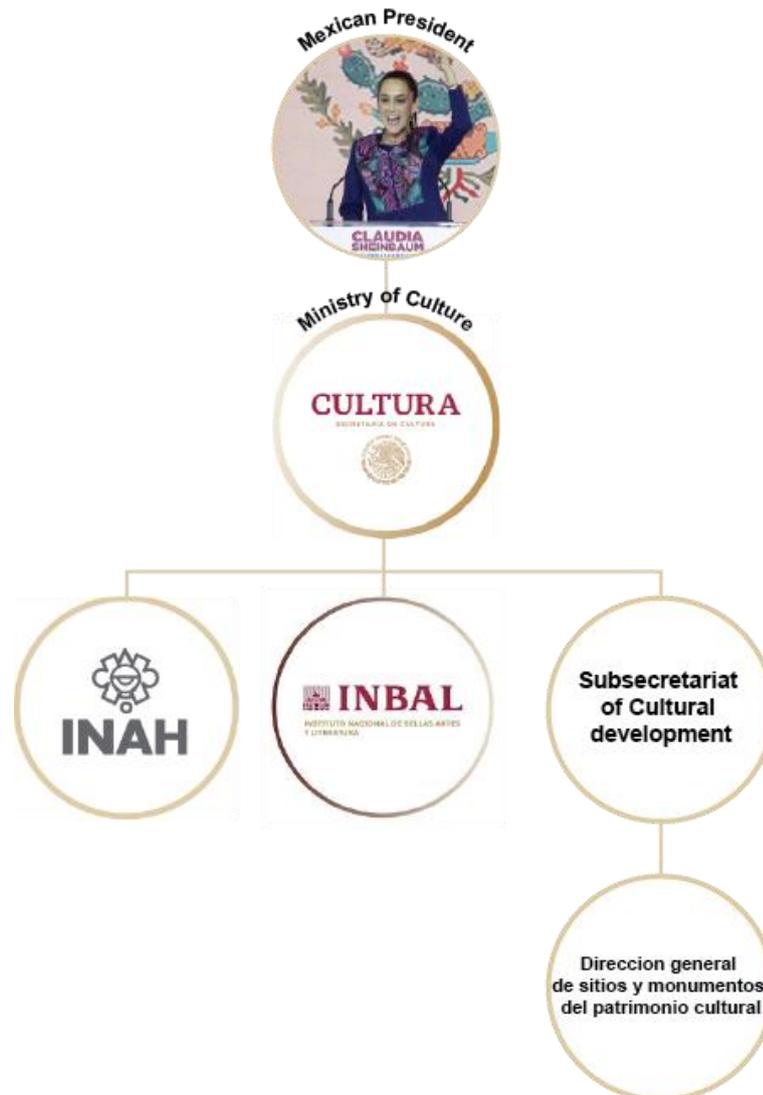
680.95 million pounds were reported as total income at the end of February 2020, receiving most of its income from the membership subscriptions, around 269.7 million pounds. Other sources of income include direct property income (196.9 million pounds), enterprise and renewable energy income (79.3 million pounds), legacies (61.6 million pounds), grants from organizations such as Natural England, the National Lottery Heritage Fund and the Department for Environment, Food, and Rural Affairs.

Based on the 2022-2023 Report (Hill, 2024), the trust reports to have spent a record of 179 million pounds on conservation efforts. This spending allowed for the opening of 'Garden in the ruins' at Nymans (Sussex), a Children's Country house at Sudbury (Derbyshire), and Crook Hall Gardens. It is also reported that the four-year restoration of Glendurgan's historic maze in Cornwall and the 7.4-million-pound conservation project at Seaton Delaval Hall (Northumberland) were completed.

Regarding their efforts to combat climate change, they have partnered with the Government, and charities such as The Royal Society for the Protection of Birds (RSPB), and World Wide Fund for Nature (WWF).

2.3 National level

2.3.1.1 Public sector



Secretaria de Cultura

The first institution in Mexico in charge of the management of culture was the Ministry of Public Education (SEP) founded in 1921, but in 1939 and 1946 this responsibility was delegated to the subdivisions of the INAH and INBAL. It was not until 1988 that both organizations, always under the surveillance of the SEP, became subdivisions of the National Council for Culture and Arts (Consejo Nacional para la Cultura y las Artes, CONACULTA), established by the president Carlos Salinas de Gortari. In 2015 President Enrique Peña Nieto created the Ministry of Culture, substituting CONACULTA and took the responsibilities associated with the protection, promotion and spread of culture and arts.

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Section 2.3 National level

Today, the Ministry of Culture (Secretaría de Cultura) in Mexico is one of the 19 entities that makes up the Public Federal Administration, being responsible of designing, executing, and coordinating public policies regarding art and culture. Specifically, it oversees developing plans, programs and projects linked to the spread, and appreciation of fine arts, culture and popular arts, as well as historical research. The Ministry is divided into the Subsecretary of Cultural Development, the Subsecretary of cultural diversity and reading promotion, and an administrative office.

Mexican public authority for the management of property with cultural heritage significance: INAH and INBAL

INAH is the public organism at the federal level in charge of investigating, conserving, and promoting the archaeological, anthropological, historical and paleoethological heritage in Mexico. Established in 1939, it now has 7 national coordination organisations and 31 regional centres distributed throughout the country, which are responsible for more than 110 thousand monuments built between the XVI and the XIX century. It is different from the National institute for Fine Arts and Literature (INBAL, Acronym in Spanish), since the INBAL is only entrusted with the conservation of artistic cultural heritage. Both organizations are in charge of maintaining a catalogue of buildings called the public register of Archaeological and Historical monuments and Zones; these buildings are deemed of cultural significance by a specialized commission. As of today, the catalogue does not include information of ownership of the assets, thus it is not possible to know the amount of them belonging to the PAs or the private sector. (Instituto Nacional de Antropología e Historia, 2022)

According to the INAH catalogue, Oaxaca occupies the 4th state with the most properties listed as historical monuments, out of which 1216 properties are currently used for religious purposes, while the most common use is for domestic purposes.

Another function of the INAH is the management of 162 museums across the country, divided according to political division of belonging: national, state, local, community, metropolitan, etc.

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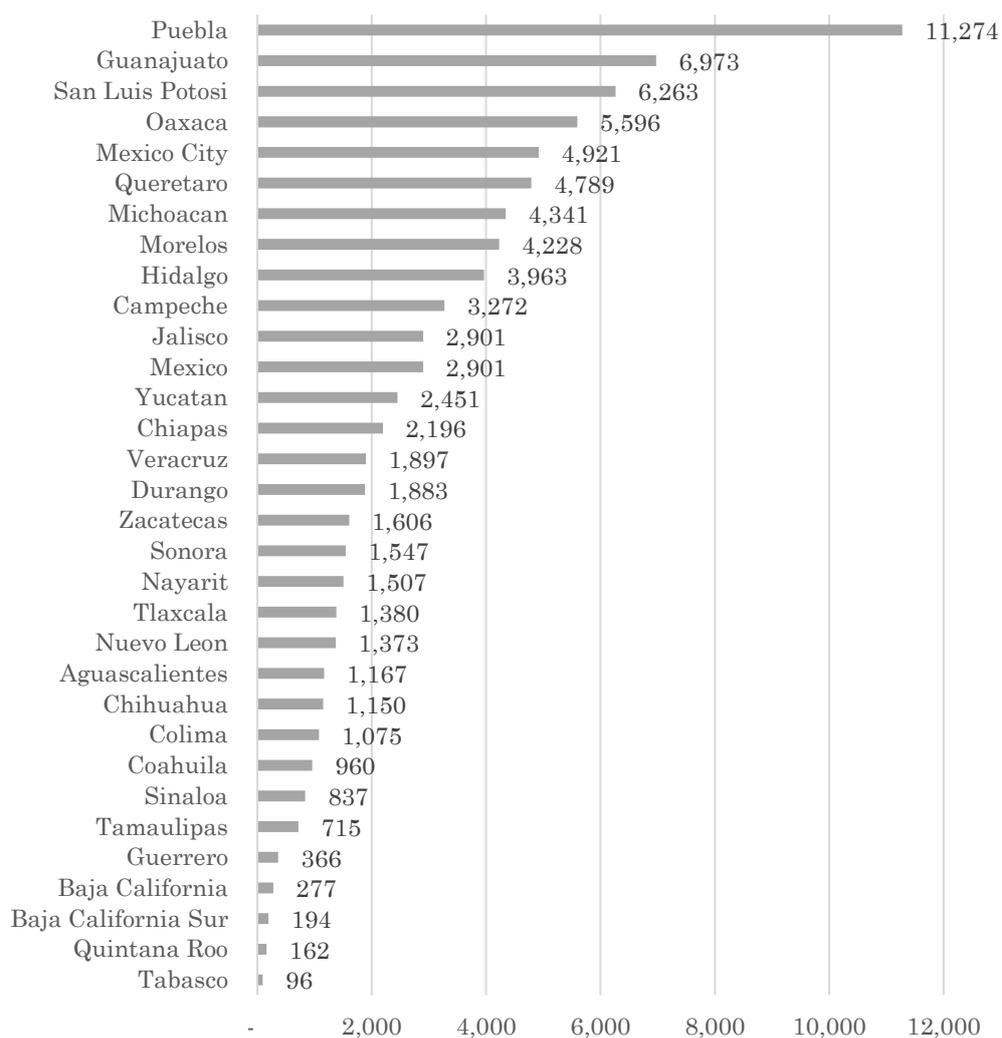


Figure 12. Total amount of listed properties in the INAH catalogue by state

With information from (Instituto nacional de antropologia e historia, 2024)

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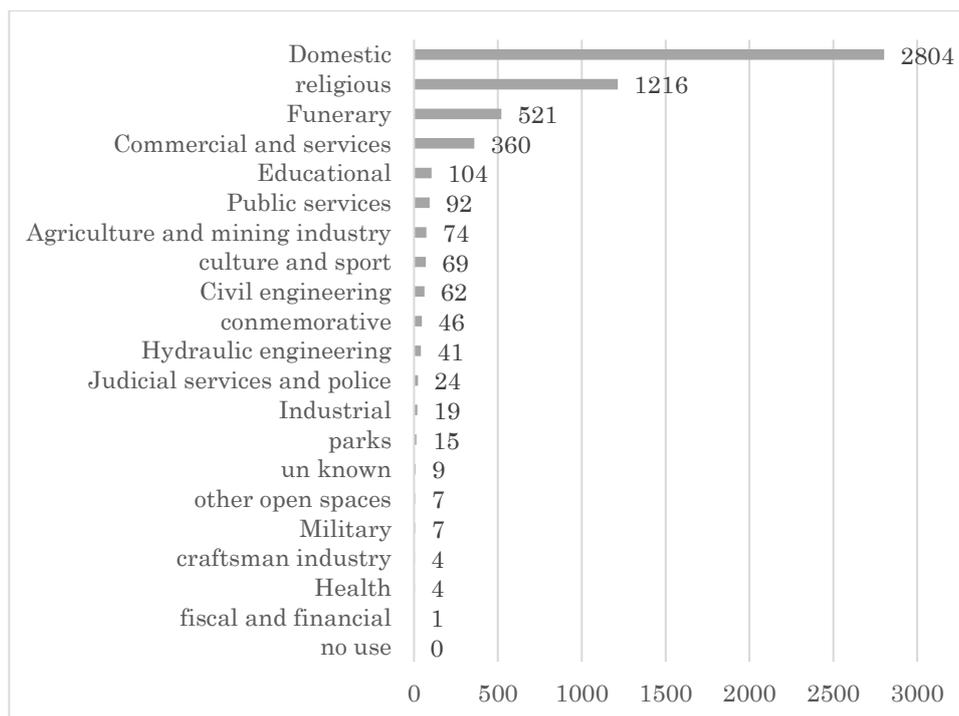


Figure 13. Count of current use of buildings registered in the INAH Catalogue in Oaxaca

With information from (Instituto nacional de antropología e historia, 2024)

Dirección General de Sitios y Monumentos de Patrimonio Cultural

The General Directorate of Sites and Monuments of Cultural Heritage is a governmental entity in Mexico dedicated to the conservation and protection of tangible and intangible assets that constitute Mexico's cultural heritage. This directorate falls under the Ministry of Culture and plays a crucial role in managing the historical and artistic heritage of the country.

Objectives and Functions

The primary objective of the General Directorate of Sites and Monuments of Cultural Heritage is to conserve the values materialized in tangible and intangible assets, consolidating a non-renewable legacy of Mexico for humanity. The specific functions of this directorate include protecting, restoring, conserving, and cataloging federally owned sites and monuments that possess artistic and historical value. This involves establishing general policies for the preservation of these heritage elements and carrying out programs, projects, and works that facilitate

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their conservation and restoration (Dirección General de sitios y monumentos del patrimonio cultural, n.d.) (Secretaria de Cultura, 2016).

History and Evolution

The federal government's responsibility to address national monuments dates back to the Reform Laws of 1860. Initially, the Ministry of Finance was in charge of controlling federal properties destined for public worship. Over time, this function was transferred to different departments, evolving into the current General Directorate of Sites and Monuments of Cultural Heritage.

In 1958, the creation of the Ministry of National Heritage consolidated the preservation functions, and in 1976, the General Directorate of Sites and Monuments of Cultural Heritage became part of the Ministry of Human Settlements and Public Works. Finally, in 1997, this directorate was integrated into the National Council for Culture and the Arts, maintaining its original functions and structure (Dirección General de sitios y monumentos del patrimonio cultural, n.d.).

Programs and Projects

The General Directorate of Sites and Monuments of Cultural Heritage has implemented various operational programs that include specific action lines to ensure heritage conservation. Among these programs are:

- **Priority Projects:** Focused on the restoration and conservation of historically significant monuments.
- **Conservation of Monuments:** Dedicated to the preservation of movable and immovable federally owned assets in various federal entities.
- **Catalog and Inventory of Assets:** A program aimed at having a systematic registry of cultural heritage data, making it accessible to the public.
- **FOREMOBA:** Support for Communities in the Restoration of Monuments and Artistic Assets of Federal Property, facilitating the conservation of historical monuments in rural and urban communities.
- **National Cathedrals Program:** Dedicated to the conservation of historical cathedrals in Mexico (Secretaria de Cultura, 2016) (Dirección General de sitios y monumentos del patrimonio cultural, n.d.).

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Collaboration and Training

The General Directorate of Sites and Monuments of Cultural Heritage also promotes training at all levels, from postgraduate studies to specialized artisanal techniques. Additionally, it provides technical assistance and support to states, municipalities, and communities, fostering local participation in conservation and restoration projects. This collaboration is essential to ensure the proper preservation and maintenance of historical monuments and artistic assets of federal property (Secretaria de Cultura, 2016) .

Leadership and Current Management

Currently, the directorate is led by Arturo Balandrano Campos, who has emphasized the importance of close coordination with other entities of the Ministry of Culture, such as the General Directorate of Popular, Indigenous and Urban Cultures and INBAL. Under his leadership, the directorate seeks to strengthen transversal communication and efforts in conservation, ensuring a collaborative and open-door approach to combine efforts in protecting Mexico's cultural heritage (Secretaria de Cultura, 2016).

In summary, the General Directorate of Sites and Monuments of Cultural Heritage is a key institution for preserving Mexico's rich historical and artistic heritage, conducting comprehensive tasks that include protecting, restoring, cataloging, and promoting these assets in collaboration with various entities and communities across the country.

2.3.1.2 Private Sector with non-profit objectives

This section will explore the various contributions of the third sector to the sustainable management of cultural heritage. It will examine the distinct characteristics that enable these organizations to effectively engage in heritage projects, such as their grassroots connections and commitment to social equity. Additionally, the chapter will analyze specific case studies and examples where third-sector involvement has led to successful preservation and enhancement of cultural sites.

Furthermore, the chapter will discuss the challenges faced by third-sector organizations, including funding constraints, regulatory hurdles, and the need for capacity building. It will also highlight the importance of fostering collaborative relationships between the third sector, public authorities, and private entities to leverage the strengths of each sector and achieve common goals.

Fundacion Harp-Helu Oaxaca

Fundación Alfredo Harp-Helú Oaxaca (FAHHO) was founded by the entrepreneur Alfredo Harp-Helú in 1994, with the mission to conserve and spread the natural and cultural heritage of Mexico, specifically of the state of Oaxaca. The FAHHO also interested in the preservation of the memory, the diffusion of knowledge and promotion of inclusion and equity with the purpose of reducing educational backwardness, combat the abandonment of the built heritage and reduce aggression towards the natural environment (Fundación Alfredo Harp Helú Oaxaca).

In 2021, FAHHO reported a total of 16,130,989,545 MXN as part of their portfolio, out of which 28% is destined to cultural projects which represents the second biggest category in which they participate. When speaking of cultural projects, they refer to a variety of tangible and non-tangible cultural values which include preservation of languages, typical clothing, ways of living, traditions, etc.

The foundation has participated in the recovery of several buildings, such as the Ex-convent of San Pablo, renamed as “Centro Cultural San Pablo” which currently serves as the offices from which they operate. According to their website, they invested 54.5 million MXN for the purchase of seven properties where the convent and church were located, while 132 million MXN were destined for the rescue and adaptation. Thanks to the project, more than four hundred direct jobs and more than 1,400 indirect

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jobs were created and maintained over approximately 7 years. The Centre opened in 2011 (Fundación Alfredo Harp Helú Oaxaca).

It is important to mention, that in Mexico the Law on Monuments and Zones of Archaeological, Artistic and Historic Nature, specifies that the owners of historical or artistic real estate assets must restore and conserve the heritage but the projects must always be approved by the competent authority: INAH or INABL. In the case of the monuments built after the establishment of the Hispanic culture, the law allows for the ownership of the real estate assets to be in hands of private parties but in the case of those built before the establishment of the Hispanic culture, also called archeological monuments and sites, are only property of the nation and can never be the object of economical transactions (Fundación Alfredo Harp Helú Oaxaca).

Another important project is Santa Rosa Xtampak, located in the state of Campeche, where FAHHO participated in the recovery of sixty-nine buildings, participation which includes research, preservation, and protection of the site. With this project, they have been able to employ 1,797 inhabitants of the communities of Bolonché and Xtampac. As previously mentioned, since Xtampak is considered an archaeological site, it is property of the nation but thanks to partnerships with the private sector and NGO's the site has been gradually restored and knowledge gained on the civilization. This project is not detailed for the lack of available information on the management strategies (Fundación Alfredo Harp Helú Oaxaca).

Fomento Cultural Citibanamex, A.C.

Fomento Cultural Citibanamex A.C. (FCCAC), is a non-profit organization which is aimed at boosting investment for the cultural development in Mexico, as well as promoting, preserving, and diffusing the Mexican culture. The objectives include promoting research to delve into the Mexican history and artistic heritage, focusing on transcendent topics rarely explored by specialized studies. Additionally, the FCCAC also engages in the cultural realm of Mexico and the world through the financing of high-quality artistic projects. Developing representative initiatives that celebrate Mexican identity and traditional values is another key goal. Moreover, efforts are directed towards contributing to the rescue and preservation of the nation's historical, architectural, and artistic legacy. Ultimately, these endeavours serve as a means to drive

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Grupo Financiero Citibanamex's dedication to supporting education, culture, and the rich traditions of Mexico.

Embedded within the mission of Fomento Cultural Citibanamex lies a meticulous preservation effort, underscored by a comprehensive analysis of 64 projects spanning 16 states of Mexico (Fomento Cultural Citibanamex, 2024). These initiatives, ranging from the preservation of archaeological wonders to the restoration of colonial-era sites and the implementation of cataloguing projects within libraries, aim to safeguard Mexico's rich cultural heritage. Additionally, the establishment of new museum facilities and developmental programs in rural communities with tourism potential further underscores the organization's commitment to both cultural enrichment and sustainable economic growth. Through these multifaceted endeavours, Fomento Cultural Citibanamex serves as a custodian of Mexico's past, ensuring its enduring legacy for future generations.

In the FCCAC website, they list the most important projects: the archaeological sites called Tamtok, Calakmul and Kabah; the convents of Guadalupe in what today is now known as the Museum of Guadalupe (Zacatecas, Mexico); convents in the zone of the Mayab such as Homun, Pichila, and Tixcacalcupul; the oratory of San Felipe Nery in what today is known as the Museum of Art (Veracruz, Mexico); the Library of Palafoxiana (Puebla, Mexico); the ex-convent San Miguel Arcangel (Cholula, Mexico); and the Mayan Textiles Center in the ex-convent of Santo Domingo de Guzman (San Cristobal de las Casas, Chiapas, Mexico).

Consejo consultivo Permanente del Centro Historico

The Consejo Consultivo Permanente del Centro Histórico de Oaxaca is a citizen advisory body established to protect and manage the historic center of Oaxaca City. This council plays a crucial role in preserving the cultural and historical integrity of the area, which is recognized as a UNESCO World Heritage Site.

The council comprises seven members who are selected based on their expertise in cultural heritage conservation. These members serve in an honorary capacity and are tasked with identifying, conserving, protecting, and rehabilitating the cultural heritage of Oaxaca's historic center. They also promote actions involving educational, cultural, artistic, and intellectual institutions to protect and conserve artistic and

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historical monuments within the historic district (Rios, 2022) (Hernandez K. , 2017).

The council's responsibilities include:

- Providing written opinions on matters related to cultural heritage conservation.
- Requesting the suspension or closure of works that violate federal, state, or local laws and regulations pertaining to cultural heritage.
- Advocating for the preservation of public spaces and the proper implementation of conservation regulations (Rios, 2022) (Flores, 2022).

Recently, the council proposed an urgent rescue plan for certain areas within the historic center, such as the street Gurrión, to address issues like unregulated commercial activities and misuse of public spaces. They have also shown solidarity with local artists and cultural groups, emphasizing the need for better planning and enforcement of heritage regulations to avoid sanctions from UNESCO (Flores, 2022) .

One of the main challenges faced by the council is ensuring compliance with the existing regulations and integrating community input into heritage management. They aim to foster a collaborative environment between government authorities and the local population to maintain the cultural and historical value of Oaxaca's historic center (Rios, 2022) (Hernandez K. , 2017).

In summary, the Consejo Consultivo Permanente del Centro Histórico de Oaxaca is pivotal in safeguarding the city's cultural heritage through community involvement, expert guidance, and stringent oversight of conservation efforts.

Patronato pro-conservación y rescate del patrimonio cultural y natural de Oaxaca

The Patronato Pro Defensa y Conservación del Patrimonio Cultural y Natural de Oaxaca (Pro-Oax) is a civil association dedicated to the preservation and promotion of Oaxaca's cultural and natural heritage. Established by the renowned artist Francisco Toledo, Pro-Oax has played

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a significant role in safeguarding the region's historical sites, natural landscapes, and cultural traditions.

Key Activities and Achievements

- **Historic Preservation:** Pro-Oax is actively involved in the conservation of historical buildings and sites. One of its notable projects is the transformation of the former Convent of Santo Domingo into a cultural and botanical center. This initiative, formalized in 1994, included the creation of the Jardín Etnobotánico de Oaxaca, which serves as a botanical garden displaying the region's native plant species (Badillo, 2024).
- **Cultural Projects:** Pro-Oax supports a variety of cultural institutions and initiatives in Oaxaca. This includes the Instituto de Artes Gráficas de Oaxaca (IAGO), which houses one of Latin America's most important collections of graphic arts. The organization also supports the Centro Fotográfico Manuel Álvarez Bravo, which is dedicated to the preservation and exhibition of photographic works (Badillo, 2024).
- **Community Engagement:** The patronato emphasizes the involvement of local communities in cultural preservation. This includes educational programs and workshops aimed at raising awareness about the importance of heritage conservation. They also collaborate with local artisans through initiatives like the Taller Arte Papel Oaxaca, which promotes sustainable art practices using local materials (Badillo, 2024).
- **Advocacy and Support:** Pro-Oax has been a vocal advocate for the protection of Oaxaca's cultural heritage. They have addressed issues such as urban development pressures, environmental threats, and the need for better regulatory frameworks to protect historical sites (Velez-Ascencio, 2012).

Pro-Oax faces ongoing challenges related to the preservation of cultural heritage in a rapidly modernizing world. These include ensuring compliance with conservation laws, securing adequate funding for projects, and balancing development needs with heritage preservation. Moving forward, the organization aims to continue its advocacy and educational efforts, fostering greater community participation and securing more resources to expand its conservation initiatives (Velez-Ascencio, 2012) (Badillo, 2024).

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Regional volunteer work: Tequio

Tequio is a traditional communal labor practice rooted in the Indigenous cultures of Mexico, particularly among the Indigenous communities of Oaxaca. This practice involves the collective effort of community members to complete projects that benefit the entire community, such as building infrastructure, maintaining public spaces, and organizing cultural events (Manzo, 2017).

Tequio has ancient origins dating back to pre-Hispanic times, where it was an integral part of the social and economic systems of Indigenous societies. The practice was used to construct communal buildings, agricultural terraces, and other infrastructure necessary for the community's survival and well-being (CZ, 2023).

In contemporary times, Tequio remains a significant cultural tradition in many Indigenous communities. It is seen to strengthen community bonds, uphold cultural values, and ensure collective well-being. The practice is voluntary and based on the principles of reciprocity and mutual aid. Community members participate without expecting monetary compensation, contributing their labor as a form of communal responsibility.

The importance of Tequio is recognized in various legal frameworks within Mexico. For instance, the state of Oaxaca has enshrined Tequio in its constitution, acknowledging it as an essential part of indigenous governance and cultural preservation. This legal recognition helps protect and promote the practice, ensuring its continuation as a living tradition (Hernandez E. , 1996).

Today, Tequio is applied to a wide range of community projects, from the construction and maintenance of schools and roads to organizing festivals and cultural activities. It also plays a crucial role in disaster recovery and environmental conservation efforts, demonstrating its adaptability and enduring relevance in modern society.

In summary, Tequio is a vibrant example of communal solidarity and cultural heritage in Mexico, reflecting the enduring spirit of cooperation and mutual support among Indigenous communities.

2.4 Sustainable management of public cultural heritage

When dealing with public cultural heritage two concepts surface: conservation and development. According to the International centre for the Study of the Preservation and Restoration of Cultural Property (ICCROM), conservation is defined as “measures taken to extend the life of cultural heritage while strengthening transmission of its significant heritage messages and values”. On the other hand, development has been used as a synonym of modernization or historical progress, as observed in the works of Walt Rostow and Karl Marx. At a first glance, it may seem that these two concepts are opposing and it can be illustrated by reflexions in the urban development field from the early XX century: “in order to encourage urban development, old neighbourhoods had to be demolished and rebuilt, and only exceptionally prestigious buildings could be spared” (Cultural Heritage Counts for Europe Consortium, 2015).

This rhetoric would change in the second half of the XX century with the widespread use of the term “Sustainable Development”, the publication of declarations such as the UNESCO Mexico City Declaration on Cultural Policies and the Nara Document on authenticity. Sustainable Development, as defined by the World Commission on Environment and Development (WCED) in 1983, is the “development that meets the needs of the present without compromising the ability of future generations to meet their own needs” (World Commission on Environment and Development, 1987). The UNESCO Mexico City declaration on cultural policies argued that “balanced development can only be insured by making cultural factors an integral part of the strategies designed to achieve it”; and in 1994, the Nara Document on authenticity stated that “the protection and enhancement of cultural and heritage diversity in our world should be actively promoted as an essential element of human development”. Both declarations coincide with the essence of sustainable development as established by the World Commission on Environment and Development in 1987 in which development emphasizes the enrichment of people in addition to economic wellbeing. (World Commission on Environment and Development, 1987).

This is why today, cultural heritage is an important vehicle for sustainable development since it “contributes to economic development”,

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“builds social cohesion”, and “mobilizes communities around its care and management” (Jagodzińska, et al., 2015).

In the document Cultural Heritage Counts for Europe (CHCfE), it is argued that culture is the fourth dimension of sustainability, and it can be used as a catalyst for a society’s development since it impacts in many areas, including: sustainable tourism, job creation, improving skills through technological innovation environment, social identity, education, and construction (Jagodzińska, et al., 2015). To support this idea, the report provides 10 key findings:

(1) "Cultural heritage is a key component and contributor to the attractiveness of Europe’s regions, cities, towns and rural areas in terms of private sector inward investment, developing cultural creative quarters and attracting talents and footloose businesses — thereby enhancing regional competitiveness both within Europe and globally." (Jagodzińska, et al., 2015)

In other words, certain areas have developed a strong and specific industry by hosting diverse actors in the public and private realm, throughout the course of their existence and it is precisely this distinguishing feature that attracts more investment and talent to the area. This is illustrated by the case in Modena, where a cluster of the motor sport industry and heritage provides the city and its surroundings with a specific identity and created a cultural hub, where companies, museums, artisan and tourist and other organisations have triggered tourism to increase.

(2) "Cultural heritage provides European countries and regions with a unique identity that creates compelling city narratives providing the basis for effective marketing strategies aimed at developing cultural tourism and attracting investment." (Jagodzińska, et al., 2015)

This is exemplified by studies made in Hamburg, which concluded that listed buildings in the commercial sector tend to be held as prestigious by clients and workers. It specifies that cultural heritage is an important factor when choosing the location for new investments, especially in the industries which recruit highly qualified staff.

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It has also been shown that when an area is listed in the UNESCO world Heritage list, this is used as an important marketing tool. The research analysed 878 listed areas which have shown benefits in tourism development and inward investment. Similar to this case, is the "Pueblos mágicos" program developed by the Mexican government (established in 2001) which promotes the sustainable development of specific municipalities which have a particular character and authenticity in relation to the tangible and non-tangible cultural heritage. The program defines a "pueblo mágico" as a "locality that has symbolic attributes, legends, history, transcendental events, everyday life [...] that emanate from each of their socio-cultural manifestations [...]" (Secretaría de Turismo, 2016). Once a municipality is part of the program, it receives public funds to develop their urban infrastructure, manage their cultural assets (Muñoz Areyzaga, 2019).

Ramírez-Silva, in his study titled "Los pueblos mágicos: una visión crítica sobre su impacto en el desarrollo sustentable del turismo" shows that the program contributes to the development of a municipality, specifically in its economy, infrastructure, services, jobs, and the creation of small and medium sized enterprises (SMEs), not to mention it may reduce migration due to the previously mentioned factors (Ramírez-Silva, 2015).

(3) "Cultural heritage is a significant creator of jobs across Europe, covering a wide range of types of job and skill levels: from conservation-related construction, repair and maintenance through cultural tourism, to small and medium-sized enterprises (SMEs) and start-ups, often in the creative industries." (Jagodzińska, et al., 2015)

The researchers found that the cultural heritage sector is estimated to have a 26.7:1 ratio in the creation of indirect jobs vs direct jobs; this is a very high value when compared to the automotive industry which has a 6.3:1 ratio. Furthermore, the World Bank estimates that in the business of building rehabilitation, for every million USD of investment more than 31 jobs are created, which is significantly higher than other sectors such as the manufacturing which created 21 jobs for the same amount of investment (World Bank, 2001).

In Mexico, the National Census and Statistics Authority (Instituto Nacional de Estadística y Geografía e Informática, INEGI) published the results of a study regarding the economic impact of the cultural sector

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which states that the sector represents the 3.1% of the jobs nation-wide, and between the years of 2020 and 2021 there was an increase of 3.5%. It also specifies that the functional classification that provides the greatest number of jobs is the crafts sector with a 37.7% and most of the other categories belong to the creative industries (INEGI, 2021). Regarding the "pueblos mágicos" program, specifically the case of the city of Cholula Puebla, when making an analysis before and after their inclusion in the program researchers have found that the incentives for entrepreneurship have had a positive impact in the creation and development of small and medium sized enterprises (Barrón-Arreola, Moreno-Moreno, & Obombo-Magio, 2021).

*(4) "Cultural heritage is an important source of creativity and innovation, generating new ideas and solutions to problems, and creating innovative services — ranging from digitisation of cultural assets to exploiting the cutting-edge virtual reality technologies — with the aim of interpreting historic environments and buildings and making them accessible to citizens and visitors."
(Jagodzińska, et al., 2015)*

The researchers exemplify this argument with the results of the European Network of Excellence on the Applications of Information and Communication technology to Cultural Heritage Project (EPOCH), which has shown to trigger innovation in the ICT sector through the creation of new products and services for the digitalisation of the cultural resources and the need to reach a wider audience using virtual technology. The project's mission is to provide an organisational and disciplinary framework to improve the connection between technology and cultural heritage in the aspects of data recovery and management, preservation, education, and dissemination (Niccolucci, 2004).

(5) "Cultural heritage has a track record on providing a good return on investment and is a significant generator of tax revenue for public authorities both from the economic activities of heritage-related sectors and indirectly through spill over from heritage-oriented projects leading to further investment." (Jagodzińska, et al., 2015)

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In the UK an analysis of over 1 million real estate transactions from 1995-2010 shows that properties in proximity or inside areas of significant cultural value show an increase in the value of their properties of approximately 23%. Moreover, further research shows that what is generating the increase in the value of properties is not purely a policy effect, but rather a heritage effect which derives from the appreciation of a particular character of the place (Ahlfeldt, Holman, & Wendland, 2012). The Borgund Stave Church is another case that proves this phenomenon; it has registered a 628.5% of return of the yearly investment, based solely on the income tax. The research estimates maintenance costs of approximately 1 million NOK per year, and 1.75 million NOK of income from tickets alone. Regarding the spill-over effect, the Pont Du Gard is used as an example, where an approximately of 3.6 million EUR is earned from the service provision to visitors of the site and the indirect impact is approximately 135 million EUR, which is spent in the surrounding area of the site. In the specific case of Mexico, the Ministry of tourism, estimates an economic spill of more than 184 billion MXN in the national market, which has stimulated the investment for the creation of new cultural and touristic services in specific areas such as Puebla, for its religious and gastronomic tourism which is recognized internationally. (Secretaria de Turismo. Gobierno de México, 2016). INEGI's 2022 report on the contribution of the cultural sector to the Gross domestic product (GDP) shows the regions of Michoacan, Guerrero, Cuernavaca, Mexico City, Puebla, Tlaxcala, and Oaxaca register a percentage of contribution to the GPD above the national median (Between 3.2-7.3%) (INEGI, 2021).

*(6) "Cultural heritage is a catalyst for sustainable
heritage-led regeneration." (Jagodzińska, et al., 2015)*

The specific cases of the Grainger Town in Newcastle Upon Tyne and initiatives related to historic urban environment such as Krakow, Lille, Liverpool, and Manchester, followed an integrated policy approach to heritage leading to the wider area. In Mexico, a similar policy was followed to develop areas in the cities of El Arenal, Amatitán, Tequila, and Teuchitlán in the state of Jalisco. In these towns, the landscapes and the old industrial facilities related to the production of Tequila alcohol, registered in the World Heritage List of the UNESCO since 2006, were the central part of the development plans of the whole region. A specific management strategy, included the conservation, restoration, and correct utilization of these protected landscapes, which were further

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detailed by criteria, operation mechanisms, performance indicators, responsible authorities, and regulations necessary to promote the sustainable development of the region (Gómez Arriola, 2009).

Oaxaca is another example of this urban regeneration led by cultural heritage strategy. A specific commission was established to lead the management of the development of the historical centre (which is also a space listed in the World Heritage List), which made the conservation of specific buildings and urban landscape the main objective of the plan of 1997. This plan was oriented to repopulate the historic centre by implementing diverse policies including the protection of the listed buildings such as historic monuments and traditional housing, giving tax breaks to private owners who participated in the rescue, and fiscal stimulus packages to increase private investment for the rescue of buildings (Gutiérrez Chira, 2019).

Another example of this regeneration led by cultural heritage is the project developed by the Cultural Heritage Finance Alliance (CHIFA) in the Tehuacán-Cuicatlán Biosphere Reserve. The project consists of a tourist route, which includes the preservation of the Cueva de las Manitas, a thousand-year-old cultural asset which is expected to bring economic growth to the Mixtec and surrounding communities. The project made with the association of the Fundación Reserva Biosfera Tehuacán-Cuicatlán, an organization that has experience with the communities in the region which develops sustainable agriculture and public awareness programs. The first phase of the project is to identify cultural and touristic assets in order to develop the tourism route. Some of the sites that have already been identified are the Cueva de las Manitas, the Guacamaya Sanctuary, the pre-Columbian fortress in Quiotepec, former train stations. The route will be developed on the Grande River, and the route can be visited in planned journeys of 1, 2 and 3 days departing from Oaxaca, and the neighbouring states of Puebla, Mexico City or Veracruz (Cultural Heritage Finance Alliance, 2022).

(7) *“Cultural heritage is a part of the solution to Europe’s climate change challenges, for example through the protection and revitalisation of the huge, embedded energy in the historic building stock.” (Jagodzińska, et al., 2015)*

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Adaptive reuse of buildings usually involves strategies to increase energy efficiency, lower carbon emission and reduce greenhouse gas emission, in addition to reducing demolition and landfills. According to the research, the most compelling argument is that by implementing a strategy of reuse and repair of the existing building stock, significant resources can be spared.

(8) “Cultural heritage contributes to the quality of life, providing character and ambience to neighbourhoods, towns and regions across Europe and making them popular places to live, work in and visit — attractive to residents, tourists and the representatives of creative class alike.” (Jagodzińska, et al., 2015)

The report exemplifies this by mentioning the case study of Mechelen (Belgium), which studied the socio-economic impact of cultural heritage and preservation on the quality of life of the citizens by strengthening the image of the city. The study gathered information by performing surveys which concluded that 88.5% of respondents considered that heritage projects contributed to the development of a new image of the city. The study also concludes that a sense of cultural identity is obtained through the valuation of the historic urban landscape.

(9) “Cultural heritage provides an essential stimulus to education and lifelong learning, including a better understanding of history as well as feelings of civic pride and belonging, and fosters cooperation and personal development.” (Jagodzińska, et al., 2015)

(10) “Cultural heritage combines many of the above-mentioned positive impacts to build social capital and helps deliver social cohesion in communities across Europe, providing a framework for participation and engagement as well as fostering integration.” (Jagodzińska, et al., 2015)

The Report of the Horizon 2020 Expert group on Cultural heritage (European Commission, 2015) suggests that the European Union should actively encourage the creative application of cultural heritage to drive economic development, generate employment opportunities, foster social unity, and uphold environmental sustainability. In the section of Economy, the study points out that the private sector should be included

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to exploit the economic potential of cultural heritage. If we consider the traditional approach to be the one in which the private sector primarily invests in tourism-related services and products provided by hotels, restaurants, and shops, and the public sector concentrates on maintaining historic buildings, parks, and museums; we can consider an alternative strategy that involves greater private sector engagement to optimize the utilization of cultural heritage within their business models. This approach capitalizes on the potential of historic areas and intangible assets to foster new manufacturing, service, and creative industries, attracting investments in heritage infrastructure and stimulating growth and employment.

In this proposed model (P3), the public sector would need to revise its approach to cultural heritage. Instead of regarding components like museums as natural monopolies, it should incentivize private sector involvement through mechanisms such as tax incentives, differentiated VAT rates, well-designed grant or loan programs, P3 schemes, rights releases, etc (European Commission, 2015). Overall, it should foster an environment conducive to private sector investment in cultural heritage.

Numerous projects in culturally rich areas have demonstrated their ability to create jobs, apprenticeships, growth, and innovation, with some being notably successful. However, this aspect remains relatively underexplored at the European level. Therefore, we advocate for support for several demonstration projects that could illustrate to communities, cities, and regions how their cultural heritage can be leveraged to generate employment in construction-related industries, cultural and creative sectors, as well as digital and clean technologies.

Similarly, there have been experiments across Europe aimed at developing new financing models for cultural heritage. Of particular interest are those that attract private investment to restore and adapt heritage assets, providing cultural and environmental services in historic areas. In these models, developers are incentivized through risk-sharing mechanisms and the opportunity to benefit from a portion of the revenues generated. We are also intrigued by the potential returns on investment derived from leveraging intangible heritage.

2.4.1 P3: Public – Private Partnerships

Public and private partnerships (P3) have been around since the beginning of civilization but this statement is misleading since the acronym P3, for Public – Private partnerships, only began to be used in the 70' and gained more attention during the 90' of the last century (De Clerck, Deumeulemeester, & Herroelen, 2012).

Because of the complexity of the projects in this category, there are many definitions but for the purpose of this study, we will refer to the ESA (European System of Accounts) where neutrality is a term used when referring to a project that is off the balance sheet of the PA, in other words that the project is not managed by the PA directly. In their study *Public and private partnership: look before you leap into marriage* De Clerck, Deumeulemeester, & Herroelen, identify 3 actors who give a *green light* when deciding to enter a P3: (1) The economist. (2) the engineers, and (3) the project managers, who together study the societal impact, social marginal cost, feasibility studies and the adequate planning of the development of the project. This shows that there is a need for an interdisciplinary approach to the decision-making process of any P3 project.

The most cited advantages are substantial public benefits, cost savings and the risk sharing opportunities (Bloomfield, 2006); while the main disadvantage is that it is more expensive to raise capital from the market for private companies than it is for the public sector, based on the complexity of the contracts and risk sharing (Zou & Fang, 2008).

In the past, the administrators believed that the responsibility they had towards society was purely in their mission statement, by means of job generation to be part of the sustainability of a strong economy in their area of influence. Following this train of thought, the sociability of a company was seen as opposite to its economy in such a way that if a company engaged in more *social action*, they would not be generating any profit for itself and as such was not taken as a primary goal (Manca, 1996). This understanding has been expanded towards the actions they can engage in, to influence a better social environment: because of their size and operations, and through the inputs into their production systems, they are able to take non-material actions that go from the preservation and enhancement of cultural and ethical values, to political power and influence (Birindelli, Bruno, Tarabella, & Angeli, 2003). These entities have now understood the end-users are looking for companies

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that not only give them jobs but can also take active participation in the creation or enhancement in the social infrastructure, contrary to the principle of economy – or profit generation. The consumer profile is changing towards consuming goods and services from companies that take care not only of their direct employees but also the source of the materials they use to produce, and the actions taken to enhance their immediate environment (Di Vito, 2022).

This change in the consumer profile is why the private sector could be interested in engaging in social action. As noted by Cristina Boniotti, from the sector of conservation of cultural heritage, P3's are more focused on for-profit objectives and have become “aimed at eliciting some return in terms either of money or image (this is why, sponsorship initiatives are included)” (Boniotti, 2021). In the cases presented in this study, this behaviour is observed, where private entities sponsor a project by giving economic or material resources to obtain certifications of social responsibility and thus changing their image to attend to the consumer requirements.

2.4.2 P4: Public – Private – People Partnerships

P3 can be seen as a top-down approach where decision makers are usually not the end-user but rather governmental leaders and top-tier executives in companies. To design better public services Wisa Majama, from the sector of urban planning, took the P3 model and added People to the formula, becoming P4 partnerships (Majamaa, 2008). There was a need to include the end-user in the formula, simply because it has been observed that bottom-up approaches deliver better goods and services since they are attending to direct needs of consumers. In her study on P4, she proposes a framework to analyse whether or not to embark into these types of projects; it involves 3 stages: life cycle approach, diversity, and customer selection. This framework is detailed in Table 1.

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Table 1. New suggested framework for end-user orientated stages and criteria for evaluation in the purchasing processes of 4P-projects.

(Majamaa, 2008)

	Evaluation stages		
Criteria Categories	Life cycle approach	Diversity	Consumer selection
Economic features	VFM in core public services and in property investment.	Added value in core public services.	Added value in third-party services and extra cashflow.
Quality and technical features related to property	Design & build and maintenance of the property.	Flexibility and usability of spaces for diversity of core public services.	Flexibility and usability of spaces for diverse third-party services.
Public and Private service features	Quality of required core services.	Service diversion and innovative development.	Possibility for free choice in core public services and innovative development of third-party services.
Risk Sharing and risk management features	Risk sharing and risk management of property investment and for core services.	Risks from networked service production.	Risks from third party services.

The involvement of diverse social and economic actors enables new ways of management of property, from the design stages of the management strategy to the executive and operational stages (Majamaa, pp. 34, 41, 55); and represents “a highly refined form of integration by which people give birth to quasi organization to wit something amounting to a half-formal, half-informal mechanism. As being a diverse and cohesive set of socio-economic actors cooperating with each other and public institutions, non-governmental actors are actively involved in the solving of shared problems. Citizens will thence become co-designers, co-producers and co-evaluators” (Boniotti, p. 4).

2.4.2.1 The Third Sector

The third sector, comprising non-profit organizations, non-governmental organizations (NGOs), community groups, and other voluntary associations, plays a crucial role in complementing public and private efforts to preserve and manage cultural heritage. Unlike the public and private for-profit sectors, the third sector is primarily driven by social missions and community-oriented goals rather than profit or governmental mandates.

The engagement of third-sector organizations in cultural heritage management is multifaceted. These entities often bring unique strengths to the table, such as deep local knowledge, strong community ties, and a high degree of flexibility and innovation. They are particularly adept at mobilizing local communities, advocating for the preservation of cultural assets, and filling gaps left by the public and private sectors.

Chapter 2 Theoretical framework
Section 2.4 Sustainable management of public cultural heritage

Public - Private - People Partnerships in Mexico: Active citizen engagement for sustainable cultural heritage management



Figure 14. Chamber of Deputies
(Oscurio, 2021)

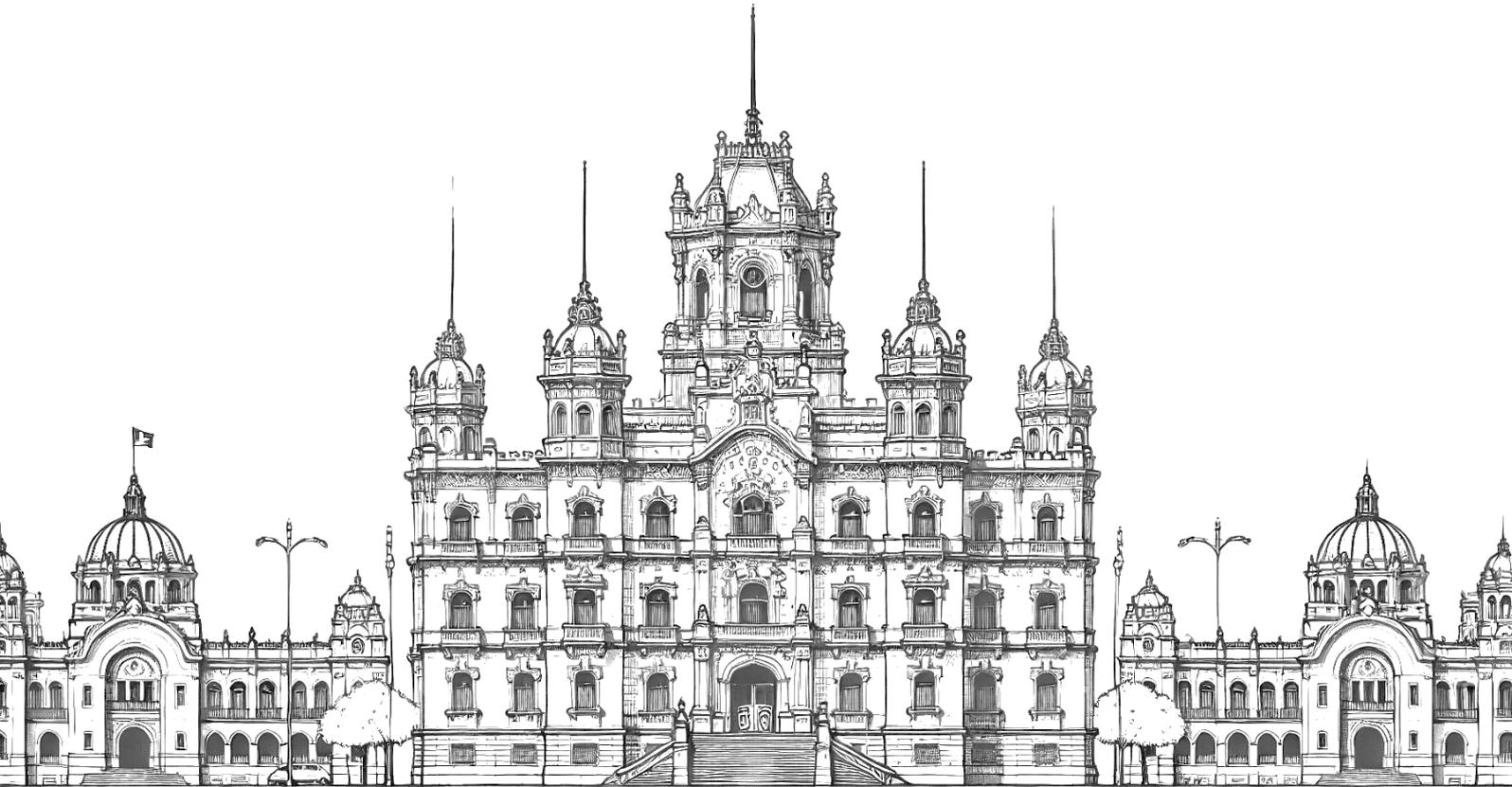


Figure 15. Sketch of an imaginary building.
Elaboration of the author

Chapter 3

3 Legal framework

The legal framework governing the management of public real estate and cultural heritage is a cornerstone of effective policy implementation and sustainable development. This chapter provides an in-depth analysis of the legal provisions, regulations, and institutional arrangements that shape the landscape of public real estate management and cultural heritage conservation in Mexico. By understanding these legal foundations, we can better appreciate the challenges and opportunities that arise in the practical management of these assets.

Effective management of public real estate and cultural heritage requires a robust legal framework that delineates the roles and responsibilities of

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various stakeholders, ensures the protection of heritage sites, and facilitates the involvement of private and third sectors. This chapter examines the federal laws, regulations, and key legal instruments that govern these areas in Mexico, providing a comprehensive understanding of the legislative environment.

Managing cultural heritage through P4 partnerships presents unique challenges, including ensuring adequate community involvement, balancing diverse stakeholder interests, and securing sustainable funding. This section examines these challenges and identifies opportunities for leveraging P4 models to enhance the management and preservation of cultural heritage sites.

The legal framework is integral to the successful management of public real estate and cultural heritage. By providing a clear and comprehensive overview of the relevant laws and regulations, this chapter lays the groundwork for understanding the complexities and dynamics of legal governance in this field. The insights gained here will inform the subsequent analysis of case studies and the development of strategic recommendations for improving public asset management and cultural heritage conservation in Mexico.

Chapter 3 Legal framework

Section 3.1 Federal Law on Archaeological, Artistic and Historical monuments and sites

3.1 Federal Law on Archaeological, Artistic and Historical monuments and sites

Published in 1972, the federal law on archaeological, artistic, and historical monuments and sites provides a framework for the management of the built environment considered cultural heritage, besides those deemed of archaeological and historical significance. It is an evolution of the Federal law on Cultural Heritage, first published in 1968, which raised concerns among collectors as it granted the government powers to intervene in private cultural property matters. To address these concerns, a committee was formed to evaluate the legislation and recommend revisions. Subsequent discussions, held publicly between March 22 and 29, 1972, involved various stakeholders, including collectors and anthropologists, debating issues such as ownership and protection of cultural artifacts. The core of the controversy was the conflicting interests between collectors, who sought to retain ownership of their archaeological treasures, and anthropologists, who argued for national ownership and preservation. Despite differing perspectives, both sides agreed on the need to address archaeological looting. Key interventions, particularly by figures like Gonzalo Aguirre Beltrán, reinforced the stance favoring national ownership and preservation. (Hernandez Sanchez, 2006).

The 1972 law makes a difference between archaeological, historical, and artistic assets. In article 28 it describes that archaeological sites and buildings are those which once belonged to the cultures before the establishment of the Hispanics in the national territory. In article 33, it is specified that the monuments of artistic relevance will be determined by INBAL, by an appointed commission that will consider diverse factors, for example, representativeness, integration into a particular artistic trend, degree of innovation, materials and techniques used and other analogous factors. For the assets of historical value, article 36 describes 4 categories, but for the interest of this study it will only be mentioned the first one, which is dedicated to the real estate assets built between the XVI and XIX centuries which were for religious, educational, public, or military use. In case an asset is categorized in more than one of the 3 groups, the archaeological value will be of priority over the historical value, while the historical value will have priority over the artistic value (Article 46).

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Article 27 of this law, states that the assets of archaeological value are always property of the nation and can never be property of privates; in further articles it prohibits them from being the object of any economic transaction. On the other hand, the same law allows artifacts, monuments, and sites of artistic and historic value to be in hands of private entities. It provides a series of regulations for their management; for example, transactions of buying-selling or exporting, must be authorized by the competent authority: INAH for those of historical value and INBAL for those of artistic value.

It is important to note that not all buildings which original use was for religious purposes are property of the nation. According to INDAABIN, only those buildings which **current use** is for religious purposes where the churches and religious aggrupation's celebrate their ceremonies are property of the nation (INDAABIN, 2013). This is to say that buildings which original use was religious and through the years have been registered for other uses are no longer property of the nation.

The VI, and last, section of this law is about the sanctions for those who violate the any of the articles in the previous sections.

3.2 Federal Law on P3 in Mexico

One of the antecedents of the Law on P3 in Mexico is the so called “proyectos de inversion de infraestructura productiva con registro diferido en gasto publico, PIDIREGAS” which surged in 1995; this model was used to develop projects of energy infrastructure such as PEMEX (Mexican Petroleum) and CFE (Federal Electrical Commission) in the aftermath of the economic crisis of 1994, which came with years of scarce public resources. This program allowed PEMEX to develop 47 projects and CFE 282 between the year 1997 and 2007 with a total investment of 1 billion 753 thousand 417 million MXN (Centro de estudios de las finanzas publicas, 2016).

Later in 2004, the rules for operating the Service Provision Projects (PPS, acronym in Spanish) were published in the Official Gazette of the Federation specifying that the Ministry of Finance and Public Credit would approve such projects and the Ministry of Public Function would supervise the federal funds involved. This type of association was the direct predecessor of the P3 and was defined as a contract between a public entity and a private entity specifically to aid in the provision of any type of public service or the fulfilment of a public function in which the private partner designs, builds, operates, maintains and/or finances the infrastructure for the provision of the service. In this way, the quality and the characteristics of the service were determined by the public partner, while the private partner was compensated after the service was delivered based on the quality criteria and performance. These contracts use to last between 15 and 30 years, depending on each project (Centro de estudios de las finanzas publicas, 2016).

It is in 2012 that the law for private – public partnerships is published, an instrument that would give legal certainty to the private sector when associating with the public sector for the development of projects of infrastructure and services for the long-term.

Today, P3 in Mexico are regulated by the Law “asociaciones publico-privadas” and was first published on January 16, 2012, with a last reform made on June 15, 2018. One of the purposes of creating this law was to have a single regulation since before it was published, the different types of private-public associations were regulated by different laws. It also gave a solid and specific legal framework, that would guarantee certainty to the private partners. Besides this, it also allowed to establish a better

Public - Private - People Partnerships in Mexico: Active citizen engagement for sustainable cultural heritage management

distribution of risks, to promote competitiveness during the public procurement procedure and to enhance the financing conditions, which in turn came with transparency mechanisms and accountability of the public resources.

Articles 2 & 3 define Public – Private Partnerships as any long-term contractual organization between the public and private sector for the provision of public services and where the private partner provides the infrastructure (partially or totally) with the objective of increasing the social wellbeing and the levels of investment in the country; this includes projects of productive investment, applied investigation and technological innovation.

Article 3 also classifies these partnerships by their financing source into three categories:

- Pure P3: the payments made for the goods and services provided by the private partner are in their totality coming from public resources of the federal government.
- Mixed P3: the payments made to the private partner come from public resources of the federal government and from the fees charged to the users.
- Auto-financed P3: the payments made to the private partner come purely from fees charged to the users.

Article 4 establishes 4 public entities that can directly initiate these types of projects: (1) entities and dependencies of the Federal PA, (2) public trust funds that are not considered parastatal entities, (3) entities of federal public rights with autonomy derived from the political constitution of the United Mexican States, and (4) federal entities (A.K.A. states), municipalities and other public entities with federal resources in accordance with the agreements they enter into.

Article 13 provides two minimum conditions for the establishment of a P3: (1) the establishment of a long-term contract where the rights and obligations of each partner are laid out, (2) the permits, concessions, and authorizations for the use and exploitation of public goods and/or the provision of public services. Besides these two basic conditions, there is an additional condition in the case of projects of technological innovation and development: the approval by the scientific and technological consultative forum, provided for, in the science and technology law.

Chapter 3 Legal framework

Section 3.2 Federal Law on P3 in Mexico

Article 14, dictates that the following analysis and studies must be made to accept a P3:

1. Description and technical viability.
2. Real Estate assets, goods and necessary rights.
3. Analysis of the necessary authorizations.
4. Analysis of the juridical viability.
5. Analysis of environmental impact.
6. Analysis of the social profitability.
7. Investment and contribution analysis.
8. Analysis of economic and financial viability.
9. Convenience of PPP compared to other options.

Article 15 establishes that part of the analysis' mentioned in article 14 must also include compliance with the disposition on environmental protection, preservation, and conservation; as well as the dispositions for human settlements and urban development; and congruence with the national plan.

Article 16 establishes that the analysis of the real estate assets should be performed/composed of (1) public registers or information about the location, ownership, encumbrances and marginal notes; (2) feasibility of acquiring the property and other assets and rights involved; (3) preliminary estimation of the value of the property, assets and rights necessary for the development of the project; (4) preliminary analysis of land use, the necessary modifications and issues; and (5) a list of other properties such as constructions, facilities, equipment and other assets that could be affected, along with the estimated cost of such impacts.

Article 17 establishes that the authority must apply the guidelines established by the Ministry of Finance and Public Credit to evaluate the convenience of developing a project.

Projects of this nature can go through several public procurement processes or stages, when it is justified, but it is preferred that they go through an integrated public procurement process and that it be a public contest. This would allow for certain projects to have flexibility and achieve better results and more efficiency (Article 19).

Article 21 establishes that each project must obtain authorization by the Inter-Ministry Commission on public spending, financing, and

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disincorporation, which evaluates its inclusion in a specific chapter of the Federal Expenditure Budget Project, as well as its execution order.

The third section of the law provides for project proposals which do not emerge from a public institution and establishes that any private entity may propose a project by submitting it to the competent federal entity. Article 26 speaks of the right that public entities must publish the sectors, subsectors, geographical locations, types, and other characteristics of the projects they would be willing to engage in. Article 31 mentions that private entities can be paid, for the preliminary studies in case a presented project is accepted and article 32 allows a public entity to buy preliminary studies from the promoter in case the project is not accepted.

Once a project is approved, it must go through a public contest procurement process (article 38), and any physical or moral person may participate, according to what is laid out in the call (Article 41).

There are specific cases in which a private entity is prohibited from participating in public procurement procedures of this nature: (1) when there are conflicts of interest with a government official involved at any level of the procurement process, (2) entities which have been deemed unfit because of the unfulfillment of a previous contract, (3) entities which have been deemed unfit by the Ministry of Public Functions, or (4) those in commercial bankruptcy (Article 42).

Proposals may be submitted up to 20 days before the decision, and only one proposal may be submitted by each participant, which must be made up of a technical and economical offer (article 51). Each proposal must be analyzed under quantifiable criteria, which allows for objective and impartial comparison (Article 52). The winning proposal will be the one that best fits the legal, technical, and economic requirements, as established in the call. In case of a tie between proposals, the contract will be awarded to the offer that ensures the best economic conditions for the state; and when the tie persists, the proposal that offers the greatest number of jobs and uses the most amount of national and regional goods or services will win (Article 54).

Other mechanisms of awarding contracts, besides a public contest, are allowed in certain situations (Article 64); this does not apply to the unsolicited projects referred to in article 26. These mechanisms may be a

Chapter 3 Legal framework

Section 3.2 Federal Law on P3 in Mexico

closed, invitation-based contest of minimum three entities or the direct awarding, only when:

- there are not enough entities to provide the required services or there is only one entity; or when one entity is the only possessor of a patent, copyrights, or any other exclusivity rights.
- The project is exclusively for the use of the military or when a public contest could put national security at risk.
- There are quantifiable and provable circumstances that could provoke substantial losses or additional costs.
- The first winner of a public contest has retracted their offer. In this case, the second-best offer must cost no more than 10% of the original winner's offer.
- A provider must be substituted because of the anticipated termination of a contract.

The required real estate assets may be acquired through purchasing the properties or through expropriation (Article 67). In the case of purchasing the properties or the use rights, this may be executed by the private partner, the public partner or both; this must be described in the public procurement call and the relative contract. The Ministry of Administration and Valorization of National Goods (INDAABIN) must execute a valuation of such properties to determine the price. (Article 68). In the case of expropriation, a social utility must be declared through the issuance of statement by the entity in charge of determining the technical feasibility and social rentability (Article 76 and 80).

The required elements a P3 contract must include are the following (Article 92):

- the judicial capacity, the rights, and obligations of each partner.
- a service level agreement where the characteristics, specifications, technical standards, performance levels, and quality of the execution of the construction works and service provision are laid out.
- a declaration of the real estate assets, the goods and rights that are affected by the project, as well as their destination at the end of the contract. This declaration must be kept updated while the contract is still active.
- the financial regime and the compensation form to the private partner.

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- the terms and conditions under which the developer must agree with its respective creditors, in case of non-compliance with them; the transfer of control of the company to its creditor's prior authorization from the contracting entity (public partner).
- the distribution of risks including technical, construction works, financial and any other between the partners.
- the dates of beginning and end of the construction works and the service provision, as well as the conditions in which the contract may be extended.
- the required authorizations for the development of the project.
- terms and conditions of the early termination of the contract.
- penalties and sanctions of each partner in case of non-fulfillment of their obligations.
- the procedures to resolve controversies.

Article 94 lays out the rights of the developer:

- receive compensation for the development of the project.
- request the extension of the contract in case the construction works have been delayed as a product of the actions of the contracting authority.
- request compensation for the extension of the contract, as mentioned in the previous point.

Article 95 lays out the obligations of the developer:

- provide the requested services, with the quality established in the SLA.
- execute the construction works, required for the service provision.
- fulfill the requests from the contracting authority, according to the contract or the current laws.
- acquire insurances and take on the risks established in the contract.
- Provide their financial statements or any other statements which give an overview of the current situation of the developer's company.
- Facilitate the audits according to the dispositions in the contract.
- Confidentiality with respect to the information and documents of the project.
- Comply with the way of communication with the contracting authority, according to the contract.

Article 98 establishes that P3 can last up to 40 years, including their extensions.

Chapter 3 Legal framework

Section 3.2 Federal Law on P3 in Mexico

The following types of agreements are mentioned in the federal law on public-private partnerships.

Contracts of operation and maintenance or administration

This type of contract requires the least number of responsibilities from the private partners. The public entity will keep the commercial & operative risks, as well as the assets' ownership. In this type of partnership, the private partner is normally compensated based on a service level agreement (SLA) through the payment by the public entity or by charging a fee to the final user. In the case there is no SLA, or it is not correctly monitored, the improvement of the service may be hindered by the lack of incentives this situation provokes.

Leasing

In this case, the private entity rents the property from the public partner and takes on the responsibility of operating and maintaining it during a predetermined period; in exchange the lessee must pay a rent to the public entity. The private partner takes on the commercial operation of the asset and charges a fee to the final user. Generally, there is an SLA in which the goals, parameters and quality standards are laid out, as well as the fees charged to the final users. The main difference with partnerships of only operation and maintenance is, that in this case, the commercial and operative risks are taken by the private partner, and this is an incentive to perform better since the profits of the private partner depend completely on the quality of execution and the fees charged to the final user.

The financing of the transformation of the asset and the property rights are kept under the responsibility of the public partner.

Build – operate – transfer (BOT)

These types of contracts consist of the transfer of the responsibility of building, operating, and maintaining one or more assets for public service provision. The public partner is owner of the assets and responsible of financing the transformation of such assets; in this regard they are also responsible of communicating the required characteristics and on some occasions the design of such transformation to the private partner.

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An Objective Specific Society (Sociedad de objeto específico, SOE) is formalized in which one or more private entities are gathered to develop the construction, operation, and maintenance, taking on the costs related to operation.

The contract is typically made up of a service level agreement, the sources of the payment for two concepts: (1) to cover the costs of design and construction, and another (2) to cover the costs for the operation and maintenance (which can be from the fees collected from the final user or a periodical payment from the public entity responsible); and a predetermined time frame to operate and maintain the property after which the transfer of the assets to public partner is expected. Contracts of this type of partnership should go through the proper public procurement procedures in which the private entities provide a single amount for the package of construction, operation, and management of the asset. In Mexico, this procedure is called “llave en mano.”

One of the main advantages of this type of partnership is that economies of scale are applied and there are incentives to increase efficiency and performance, since the operation and maintenance of the asset are tailor-made to the design and construction, while minimizing the lifecycle costs. In case the SOE is responsible for charging the final users a fee and their profits depend on them, the commercial risk is partially or totally taken on by the private partner(s). Disadvantages surge because the financial risks are taken on by the public entity.

Design – build – finance – operate (DBFO)

These types of partnership are similar to the Built-Operate-Transfer; the fundamental difference is that the private partner(s) finances the project, allowing the public sector to not use public funds to develop the infrastructure. This type of partnership also requires an SOE to be formalized, and it is the organism responsible for the financing and development of the project. This SOE is typically formed by one or more private entities, each specialized in a different component of the process, be it design, construction, operation, or maintenance.

The typical approval process for this type of partnership includes the presentation of an executive project, a technical offer, a cost-benefit analysis, and a study of value-for-money. Once the viability of the project is proved, the public procurement procedure may start. It must be a public competitive procedure, and the contract is awarded to the proposal

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Section 3.2 Federal Law on P3 in Mexico

which offers the best economic conditions for the public entity, and whoever proves their capacity to meet, or increase, the quality and service performance requirements.

To finance the project, the SOE may recur to private investment funds, private banks, and others. Typically, the SOE provides 20% of the total capital and the rest is obtained through financial systems. In the case the project is socially profitable, the public sector may give subsidies, non-recoverable contributions, credits in extraordinary conditions and other types of contributions. To improve the conditions of the financial terms the SOE has access to, the government may emit credit guarantees and other financial mechanisms to reduce risks.

The contract typically includes a predetermined period in which the SOE receives the revenues of the project as payment. The certainty of future positive inflows may allow the SOE to negotiate better terms of financing. The contract also typically includes an SLA in which the performance standards and the service quality are laid out; it may also include general characteristics of the facilities, mechanisms and sources for payments, risk distribution, and responsibilities of each partner, as well as the time frame in which the property rights of the assets are held by the private partner(s).

Once the contract has ended, the SOE must transfer the property rights of the assets to the public entity which then assumes the responsibility of operating and maintaining it. In some cases, the public entity may extend the contract period or start a new public procurement procedure.

Concessions

Similar to DBFO, concessions are contracts in which the responsibilities of financing, building, administering, and operating assets are transferred to a private entity for a predetermined period of time and in which the revenues from fees charged to the final users are retained by the private entity. They typically last 25-30 years but are limited up to 40 years, according to the current law on P3; the longer the period, the higher the return on the investment.

The rights of property remain in the hands of the public partner, but they are temporarily transferred to the private partner to be exploited. At the

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end of the contract, the entire property rights go back to the public partner.

Since the payment to the private partner is typically through charging a fee to the final user, the commercial risks are transferred to this partner. In the case the revenues from this charged fee are insufficient, the public partner may issue other types of benefits as payments, such as subsidies, special credits, etc.

Most risks are transferred to the private partner, including risks associated with the construction and operation, as well as the financial risks. To finance the project, the private partner typically provides 20% of the initial investment while the remaining can be obtained through private investment funds, private banks, or a mix of sources.

The main advantages are that the commercial, financial, construction, operation and maintenance risks are taken on by the private partner; this allows the public partner to focus their time and resources on the provision of core public services.

The main disadvantages are the technical complexity of making contracts, as well as distributing risks and responsibilities, determining the amount of the fee charged to the end user, and developing and enforcing a service level agreement. If these factors are not paid attention to, it may lead to contract renegotiation or project failure.

Joint ventures

These types of partnerships are based on corporate governance as any other company, and as such, the distribution of stocks is case based. The controlling stockholder has administrative control of the company, and thus takes decisions on the administration and operation of stocks.

- In the case in which the shared company is owner of the assets, the public partner will tend to want to be the controlling stockholder to be able to decide over their use; while the private partner bring to the table technology, knowledge and capacities to optimize the processes and allow the public partner to focus their time and energy to the provision of core public services.
- The main advantages of this type of partnership lies in the sharing of the profits, more efficiency and quality of the core public services provided, more transparency and the participation

Chapter 3 Legal framework
Section 3.2 Federal Law on P3 in Mexico

of the private sector under the supervision of the public for the service provision.

- The main disadvantages are like the other types of partnerships: lack of supervision and regulation of the contract may end in the termination of the contract before the established date or the failure of the project; another potential risk is the design.

3.3 The current situation of P3 in Mexico in other sectors

Recent studies have found that the situation of P3 in Mexico is not very well documented (Acosta Perez, 2019). Different databases report different quantities, specifically due to a lack of uniformity in the definition of P3 in Mexico, some of them being regulated by the law for APP, and others being regulated the project PIDIREGAS.

The databases at an international level include the World Bank's data base, which reports that between 1992 and 2016, there were 410 P3 in Mexico. Another database available is the "P3 knowledge lab" that counts 279 P3 projects in Mexico since 1990 (PPP Knowledge Lab, 2021). Since the Law on P3 in Mexico was not published until 2012, it is possible to say that some of these projects were not structured according to this law

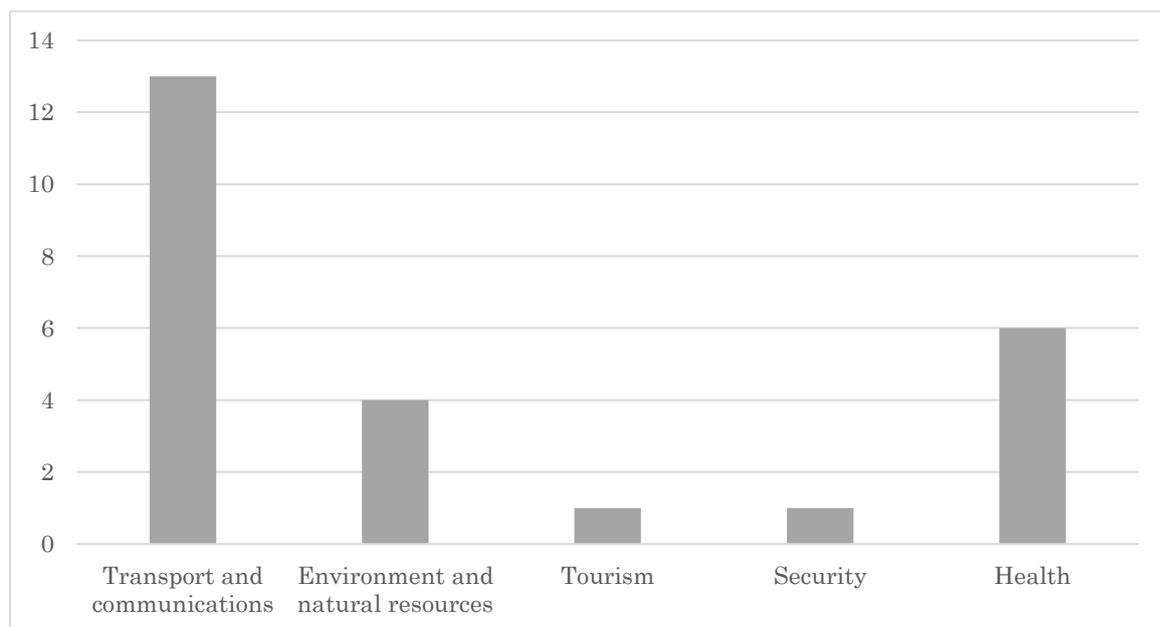


Figure 16. P3's in Mexico by Category

Own elaboration, with information from (Transparencia presupuestaria, 2023)

Two databases at the national level include the trimestral report on the economic situation, public finance, and public debt, which reports there are currently twenty-five projects being developed under the P3 scheme. More than half of these projects are under the category of transport and communications in diverse states of the Mexican Republic, specifically twelve of them revolve around the maintenance of roads and highways, having only one project in the communications category.

Chapter 3 Legal framework

Section 3.3 The current situation of P3 in Mexico in other sectors

Another source at the national level is the “Proyectos Mexico” website which is administrated by BANOBRAS (Banco Nacional de Obras y Servicios Publicos), which reports 354 projects in operation and 157 new projects being developed.

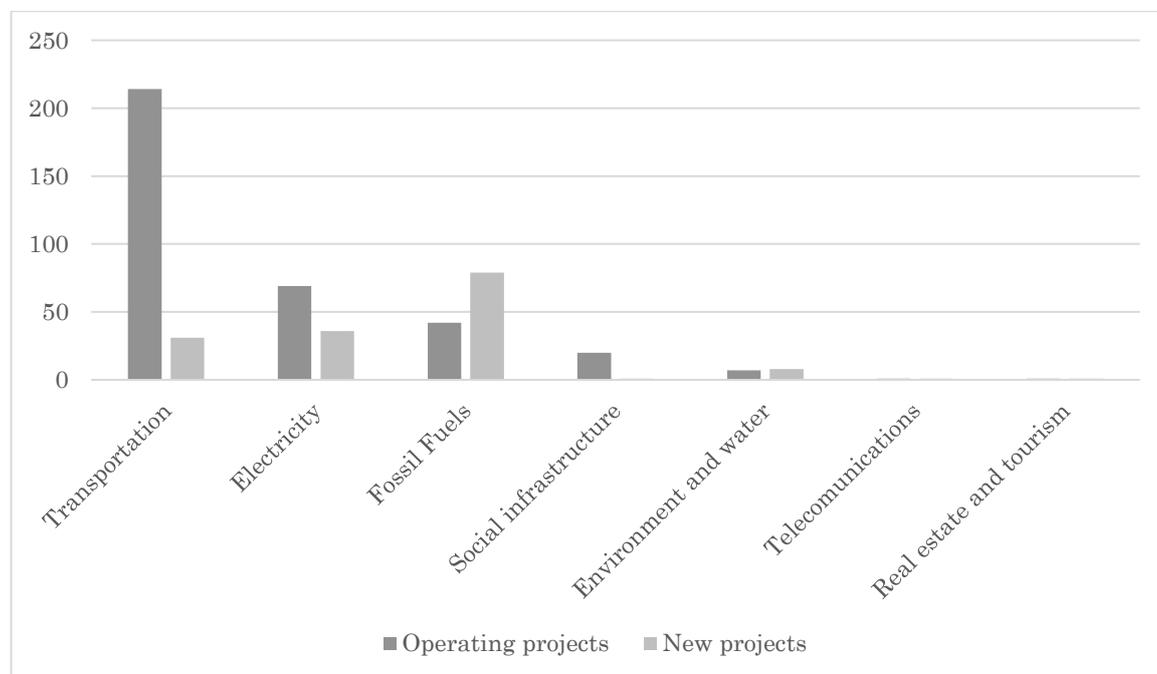


Figure 17. Projects registered on the website Proyectos Mexico by category

Own production with information from (Banco Nacional de Obras y Servicios Publicos, 2024)

Although it is not yet clear how P4s can be governed for the management of cultural heritage sites, since there is no specific law of P3s for cultural heritage management nor a general law governing the P4 modality of these innovative partnerships for any types of projects.

3.4 Legislative framework for P4 for Cultural Heritage in Mexico

P4 in Mexico represent an innovative approach to managing cultural heritage, involving public entities, private sector participants, and civil society. This model aims to leverage the strengths of each sector to preserve and enhance cultural heritage sites, ensuring sustainable development and community involvement.

The legal foundation for P4 in Mexico's cultural heritage sector builds on the broader P3 Law of 2012, which facilitates long-term collaborations between public institutions and private entities. This framework has been adapted in specific cases to include people or community groups, acknowledging their essential role in preserving cultural heritage: Community groups, non-profits, and local residents are actively involved in the planning, implementation, and management of cultural heritage projects. Their participation is crucial for ensuring that the projects meet local needs and preserve cultural values. This inclusive approach is facilitated by legal provisions that allow for co-design and co-management of heritage sites (Boniotto, 2021) (RICHS Project, 2016).

The law permits private entities to submit unsolicited proposals for cultural heritage projects, provided they demonstrate clear benefits and compliance with heritage preservation standards. These proposals must undergo a rigorous evaluation process by public authorities (RICHS Project, 2016). Before approving a P3 (or P4) project, a comprehensive analysis of risks, costs, and benefits is mandatory. This includes assessing financial viability, potential social impact, and the comparative advantage of the P4 model over traditional public sector projects (Jelincic, Tisma, Senkic, & Dodig, 2017). P4 contracts in the cultural heritage sector (in the international stage) are designed to be flexible, accommodating changes in project scope, risk allocation, and compensation.

Chapter 3 Legal framework

Section 3.4 Legislative framework for P4 for Cultural Heritage in Mexico

Navigating the regulatory landscape can be challenging, especially when multiple stakeholders are involved. Ensuring compliance with both heritage conservation laws and P3 regulations require meticulous planning and coordination. Effective community engagement is essential but can be difficult to achieve. Ensuring that local voices are heard and integrated into decision-making processes is critical for the success of P4 projects.

P4 offers a robust mechanism for the preservation and enhancement of cultural heritage sites by combining resources and expertise from diverse sectors. These partnerships promote sustainable development by ensuring that cultural heritage projects are economically viable, socially inclusive, and environmentally sound.

The legal framework for P4 in Mexico's cultural heritage sector is based on the framework for P3 for infrastructure development projects, thus there is still a legislative gap to cover the collaboration between the 3 entities: Public – Private – People. It should be designed to foster collaboration among public institutions, private entities, and community groups.

This model not only enhances the preservation of cultural heritage sites but also promotes sustainable development and community empowerment. By addressing regulatory challenges and leveraging the strengths of each sector, Mexico can effectively manage and preserve its rich cultural heritage for future generations (RICHS Project, 2016) (Jelincic, Tisma, Senkic, & Dodig, 2017).

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*Figure 18. Mexico Cathedral in Mexico City
(Fotografía)*

Chapter 4 Case Studies

Section 3.4 Legislative framework for P4 for Cultural Heritage in Mexico



Figure 19. Sketch of an imaginary building.

Elaboration of the author

Chapter 4

4 Case Studies

Understanding the practical application of theoretical concepts and legal frameworks requires examining real-world examples. This chapter presents a series of case studies that illustrate the current practices, challenges, and successes in the management of cultural heritage sites in Mexico. These case studies provide invaluable insights into how different management models, including Public-Private Partnerships (P3) and Public-Private-People Partnerships (P4), are implemented on the ground. By analyzing these examples, we can draw lessons and identify best practices that can inform future projects and policy developments.

Purpose of the Case Studies

The case studies in this chapter aim to achieve several key objectives:

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1. **Illustrate Management Practices:** Showcase the various approaches to managing cultural heritage sites, highlighting both successful strategies and areas needing improvement.
2. **Identify Challenges and Solutions:** Explore the specific challenges encountered in these projects, such as legal hurdles, funding issues, and community engagement, and examine the solutions that have been employed to address these problems.
3. **Evaluate Impact:** Assess the socio-economic and cultural impacts of the projects, considering how they contribute to sustainable development, community engagement, and cultural preservation.
4. **Draw Comparative Insights:** Compare different management models to understand the relative advantages and disadvantages of each approach, providing a basis for recommendations and future research.

This chapter covers several case studies, each providing a unique perspective on the management of cultural heritage in Mexico. These include:

1. 12000 BC – Manitas Cave Archeology Project
2. 900 BC - Copalita Huatulco
3. 600 BC - Mitla Archaeological Site and Caves
4. 500 BC - Monte Albán
5. 900 - Yagul Archaeological Site and Caves
6. 1529 - Templo de San Pedro y San Pablo ETLA Oaxaca
7. 1548 - Ex-convent and Temple of Santo Domingo de Guzmán Chiapas
8. 1572 - Ex-convent of Santo Domingo Oaxaca Mexico
9. 1636 - Ex-convent and Temple of San Pablo Oaxaca Mexico
10. 2019 - New Aquarium of Mazatlán Sinaloa

The case studies were selected based on their relevance to the themes of this research and their representation of diverse management approaches. Data was collected through:

- **Document Analysis:** Reviewing official documents, reports, and publications from relevant authorities and organizations.
- **Interviews:** Conducting interviews with key stakeholders, including historians, archaeologists, public officials, community leaders, and representatives from non-profit organizations.

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- **Site Visits:** Performing site visits to observe the conditions and management practices firsthand.

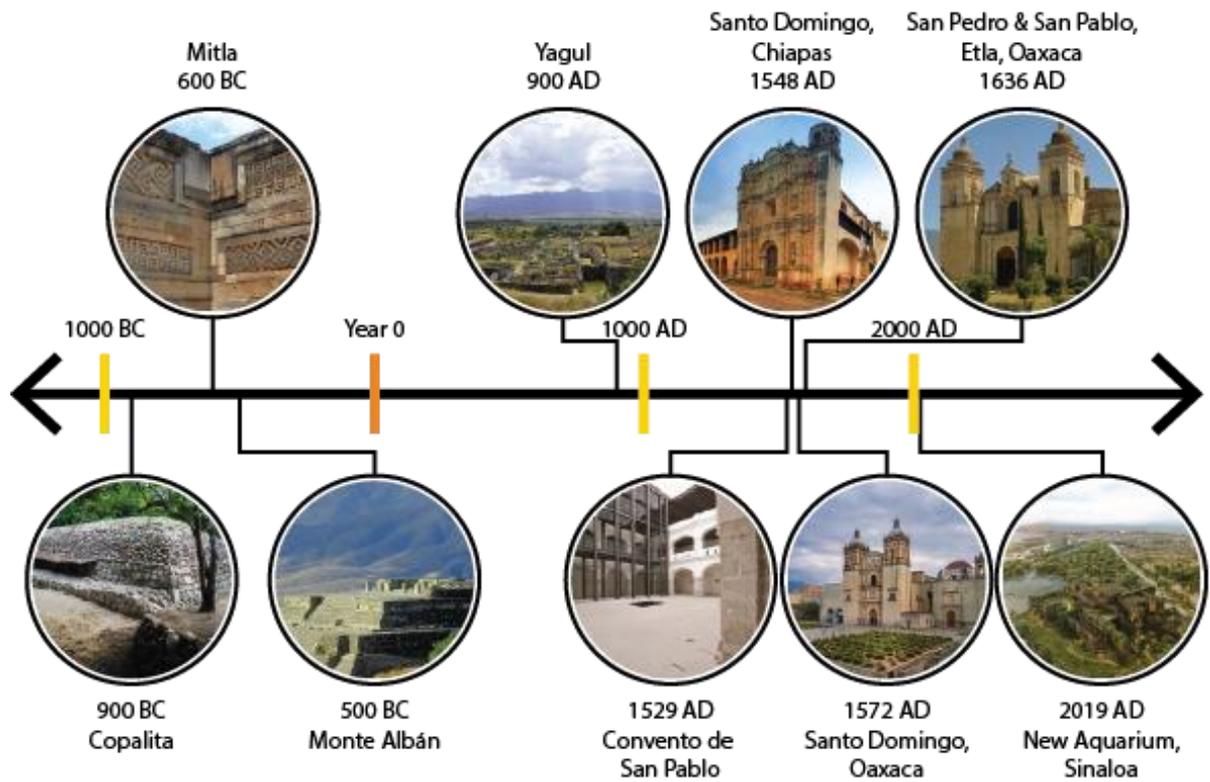


Figure 20. Timeline of the case studies

Elaboration of the author

Public - Private - People Partnerships in Mexico: Active citizen engagement for sustainable cultural heritage management

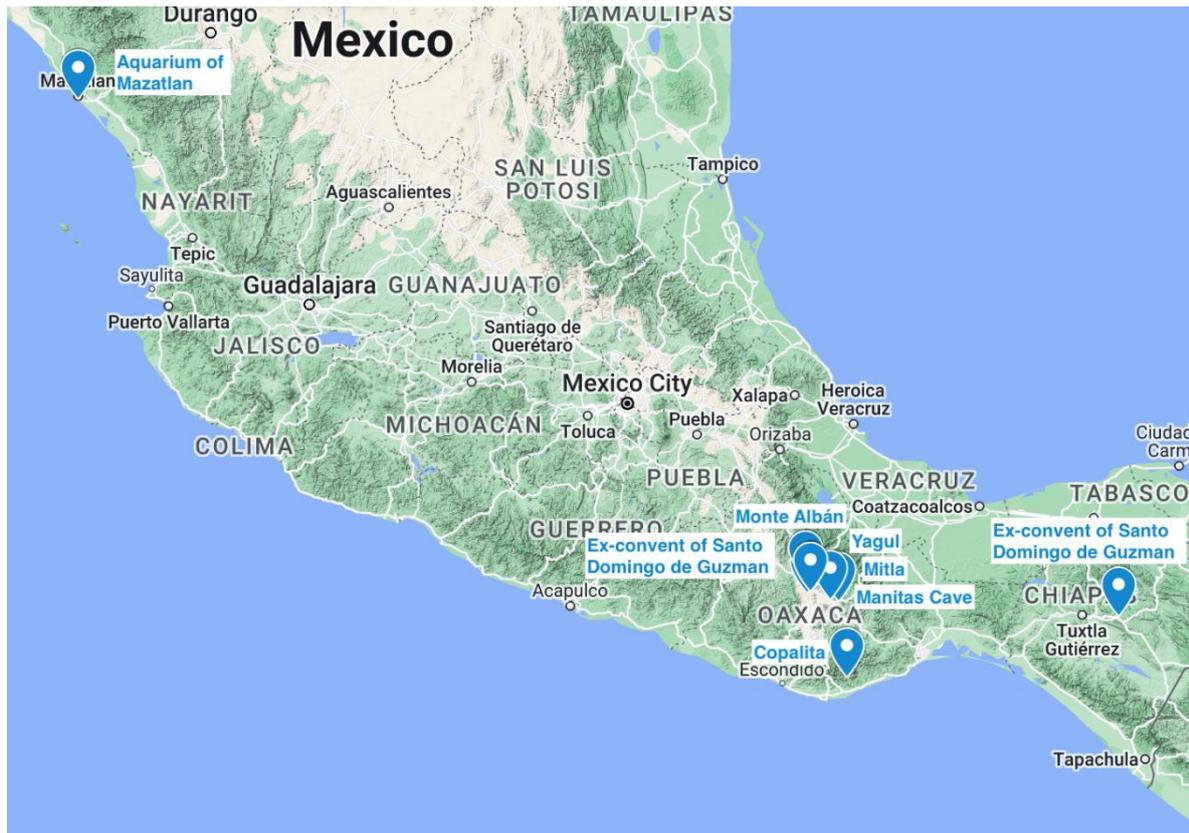


Figure 21. Map of the location of the case studies.

*Elaboration of the author
Map data 2024 Google, INEGI*

Each case study is structured to provide a comprehensive understanding of the project:

1. **Background:** A brief history and significance of the site.
2. **Management Approach:** An overview of the management model used, including the roles of public, private, and third-sector entities.
3. **Challenges:** A discussion of the main challenges faced during the project.
4. **Outcomes:** An assessment of the project's outcomes, including its impact on cultural preservation, community engagement, and sustainable development.
5. **Lessons Learned:** Key takeaways and best practices that can inform future projects.

By examining these case studies, we can gain a deeper understanding of the complexities involved in managing cultural heritage sites in Mexico. These examples highlight the importance of innovative partnerships, community involvement, and adaptive management practices in

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achieving sustainable and inclusive outcomes. The insights gained from these case studies will be critical in developing strategic recommendations and advancing the field of cultural heritage management.

Selection of the cases

The case studies presented in Chapter 4, covering various cultural heritage sites in Mexico, share several commonalities that provide insights into the broader trends and challenges in cultural heritage management. These commonalities are essential for understanding the systemic issues and opportunities that can inform future strategies and policies.

1. Engagement of Multiple Stakeholders

All the case studies highlight the importance of involving various stakeholders, including public authorities, private entities, non-profit organizations, and local communities. This multi-stakeholder approach is crucial for:

- **Resource Mobilization:** Leveraging financial, technical, and human resources from different sectors.
- **Knowledge Sharing:** Combining expertise from different fields to address complex challenges.
- **Community Support:** Ensuring local communities are engaged and supportive of heritage projects.

2. Public-Private Partnerships (P3) and Public-Private-People Partnerships (P4)

The case studies demonstrate the use of both P3 and P4 models, indicating a trend towards more inclusive and participatory management approaches. These models help in:

- **Risk Sharing:** Distributing financial and operational risks among partners.
- **Sustainable Funding:** Securing funding through diverse sources, reducing reliance on public funds.
- **Enhanced Outcomes:** Achieving better cultural, social, and economic outcomes by incorporating the perspectives and needs of various stakeholders.

3. Legal and Regulatory Frameworks

Each case study operates within a specific legal and regulatory context, highlighting the importance of:

- **Compliance:** Adhering to national and local laws and regulations governing cultural heritage.
- **Policy Support:** Utilizing supportive policies and incentives to facilitate heritage conservation and management.
- **Legal Challenges:** Addressing legal ambiguities and challenges that can hinder effective management.

4. Community Involvement and Empowerment

A recurring theme is the active involvement of local communities in the management and decision-making processes. This includes:

- **Cultural Preservation:** Ensuring that management practices respect and incorporate local traditions and knowledge.
- **Economic Benefits:** Providing economic opportunities for local communities through tourism and related activities.
- **Social Cohesion:** Strengthening community ties and fostering a sense of ownership and pride in cultural heritage.

5. Sustainable Management Practices

Sustainability is a key focus across the case studies, with efforts to balance conservation and development. Sustainable practices include:

- **Environmental Conservation:** Implementing measures to protect natural environments and reduce environmental impact.
- **Economic Viability:** Developing economically viable models that ensure long-term maintenance and conservation of heritage sites.
- **Cultural Continuity:** Preserving the cultural significance and authenticity of heritage sites while adapting them for contemporary use.

6. Challenges and Solutions

The case studies share common challenges such as funding limitations, legal ambiguities, and managing stakeholder interests. Solutions often involve:

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- **Innovative Funding Mechanisms:** Exploring new ways to finance heritage projects, including grants, donations, and revenue-generating activities.
- **Policy Reforms:** Advocating for legal and policy reforms to address regulatory gaps and support heritage conservation.
- **Adaptive Management:** Employing flexible and adaptive management practices to respond to changing conditions and stakeholder needs.

The commonalities between the case studies in Chapter 4 underscore the critical factors that contribute to successful cultural heritage management. These include stakeholder engagement, sustainable practices, community involvement, and supportive legal frameworks. By understanding these shared elements, we can develop more effective strategies and policies to protect and promote cultural heritage in Mexico and beyond.

4.1 Manitas Cave Archaeology project



Figure 22. Cueva de las manitas
(Robles García, *La Cueva de las Manitas. Cuicatlan, Oaxaca, 2024*)

4.1.1 Description

The Manitas Cave Archaeology Project in Oaxaca, Mexico, is an ongoing archaeological investigation centered around a cave complex in the Mixteca region of Oaxaca. The project is named after the distinctive handprint motifs, often referred to as "manitas" (little hands), found on the cave walls, which are believed to have been created by ancient indigenous peoples. The discovery of the caves was in 1970 by don Rafael Cruz Vazquez (INAH custodian) and it is the most important finding in the cave art sphere in the state. (Robles García, *La Cueva de las Manitas. Cuicatlan, Oaxaca, 2024*)

The caves are 30m in longitude, 8 of height and 15 m in depth. In its interior, there are complex motifs of cave art, and in the outside there is evidence of human presence for a long time which include small adobe walls, remains of bonfires and fibrous conglomerates which is believed to be chewed maguey. (Robles García, *La Cueva de las Manitas. Cuicatlan, Oaxaca, 2024*)

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Section 4.1 Manitas Cave Archaeology project

This site is of significant importance due to its rich assemblage of rock art, including petroglyphs and pictographs, as well as other cultural artifacts. The cave's artwork is thought to date back thousands of years, providing valuable insights into the early human occupation and the cultural practices of the region's ancient inhabitants.

Archaeologists working on the project have uncovered evidence suggesting that the cave was used for a variety of purposes, including ritual activities, shelter, and perhaps as a place of refuge. The presence of the handprints, alongside other symbolic imagery, indicates that the cave held spiritual significance for the people who created the artwork.

The project has been multidisciplinary, involving archaeologists, anthropologists, and specialists in rock art, with the aim of preserving the site and understanding its broader cultural and historical context. The findings from the Manitas Cave Archaeology Project contribute to a deeper understanding of the pre-Columbian history of Oaxaca and the intricate belief systems of the region's early societies.

The caves are located in the Tehuacan-Cuicatlan Biosphere, a World Heritage site designated in 2018 (Bonnie Burnham, 2022). Located across the states of Puebla and Oaxaca, it is an ecologically and culturally significant area that spans approximately 490,000 hectares. It is renowned for its extraordinary biodiversity, particularly in arid environments, and its long history of human settlement and agricultural innovation.

The reserve contains one of the highest concentrations of columnar cacti in the world, with 45 of the 70 species found in Mexico located here. These cacti are the dominant species in nine different plant communities, many of which are endemic to the region. Additionally, the area includes diverse ecosystems such as xeric shrublands, tropical deciduous forests, and pine-oak forests, all thriving at different altitudes. This biodiversity hotspot is also home to numerous endemic species, including 20 reptile and 16 bird species, contributing to its recognition as an IUCN world biodiversity hotspot. (UNESCO, 2012)

The region is not only ecologically rich but also holds significant archaeological value. It has been inhabited for over 12,000 years, with evidence of some of the earliest forms of agriculture and irrigation systems in Mesoamerica. This long history is reflected in the numerous

archaeological sites scattered throughout the valley, including ancient terraces, canals, and cave paintings, which provide insights into the early adaptations of indigenous peoples to this challenging environment. This unique blend of biological diversity and historical importance makes the Tehuacán-Cuicatlán Biosphere Reserve a vital location for both conservation and research into ancient civilizations in the Americas (Latin America & Caribbean Geographic, 2023) (UNESCO, 2012).

4.1.2 Management strategies & partnerships

Regarding the conservation efforts, INAH and collaborating institutions – such as Cultural Heritage Finance Alliance (CHiFA), National Autonomous University of Mexico (Universidad Nacional Autónoma de México, UNAM), University of the Sea (Universidad del Mar, UMAR), and community councils – work together to develop conservation plans for the rock art and any other artifacts found at the site. This involves protecting the cave environment, preventing vandalism, and ensuring that the site remains intact for future research.

The project is usually coordinated by a lead archaeologist or a team of researchers who oversee the fieldwork, data collection, and analysis. This team works closely with INAH to ensure that all activities comply with national regulations.

Efforts are made to educate the public and local communities about the significance of the site. This can involve creating educational materials, organizing tours, and hosting events to raise awareness about the importance of preserving cultural heritage.

If the site is made accessible to visitors, careful management is required to balance public access with conservation needs. This often involves creating controlled pathways, limiting visitor numbers, and providing interpretative guides to ensure that the site is not damaged by tourism.

Continuous monitoring of the site is essential to protect it from natural and human-caused threats. This includes regular inspections and the use of technology to track changes in the condition of the rock art and the cave environment.

Overall, the management of the Manitas Cave Archaeology Project is a collaborative effort that seeks to preserve the site while advancing our understanding of the region's ancient cultures.

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Section 4.1 Manitas Cave Archaeology project

In 2022 a grant was given by the American Express Foundation, and it was dedicated to support the creation of a gateway into the area and a Visitor Center that will offer touristic services such as guided tours. (Bonnie Burnham, 2022). The project was expected to benefit (directly and indirectly) approximately 15,000 people and seven communities located in the World Heritage site, while creating 129 fulltime and temporary jobs.

In 2024, the Mellon Foundation granted CHiFA 500,000 USD to support planning and research in the site which will be dedicated to the creation of immersive and interactive learning tools and site-specific visitor facilities.

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Table 2. Summary: Manitas cave Archaeological Project

Name of the project	Manitas Cave Archaeological Project		
Location	States of Oaxaca and Puebla, Mexico		
Date of construction start	No data - beginning of occupation 1970 - Discovery		
Date of opening to the public	Not open to the public		
Type of project	Public – Private – People Partnership		
Area of the project (m²)	490,000 Hectares		
Estimated investment	CHiFA granted 500,000 USD		
Current Stage	Archeological investigation		
Project structure including governance	INAH is the manager of the archaeological sites owned by the federation, and constantly collaborating with Universidad Nacional Autonoma de Mexico (UNAM) and Universidad del Mar (UMAR) researchers and investigators. CHiFA and American Express Foundation have given grants to support the research. The community council supports in the maintenance of the site through the community service called <i>tequio</i> wich will be further explored in other case studies		
Financing	American Express Foundation grant (amount unknown), which was used to support the creation of a gateway into the area and a visitor center. CHiFA awarded 500,000 USD to support planning and research in the site.		
Partners	Public Admin.	Private Entities	Third Sector
	INAH	Universidad Nacional Autonoma de Mexico (UNAM), Universidad del Mar (UMAR)	Community council, CHiFA, American Express foundation
	<i>Roles & Responsibilities</i>		
	Owner and archaeological investigation	Research and Investigation	Financial Grants, Maintenance of selected sites
Project Summary	<p>The Project: Regarding the conservation efforts, INAH and collaborating institutions – such as Cultural Heritage Finance Alliance (CHiFA), National Autonomous University of Mexico (Universidad Nacional Autónoma de México, UNAM), University of the Sea (Universidad del Mar, UMAR), and community councils – work together to develop conservation plans for the rock art and any other artifacts found at the site. This involves protecting the cave environment, preventing vandalism, and ensuring that the site remains intact for future research.</p> <p>The project is usually coordinated by a lead archaeologist or a team of researchers who oversee the fieldwork, data collection, and analysis. This team works closely with INAH to ensure that all activities comply with national regulations.</p> <p>Challenges: Because of the extension of the site, management is unable to provide protection from looting, vandalism and it may be potentially affected by tourism if the site is open to the public</p> <p>Why P4?: because of the international notoriety, private non-profit organizations and the local community support INAH in the financing and maintenance of the site.</p>		

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Section 4.1 Manitas Cave Archaeology project

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Section 4.2 Archaeological and eco-tourism park Copalita

4.2.1 Description

The archaeological site of Copalita, located in Huatulco, Oaxaca, is an area of significant historical and cultural importance. Known as the Eco-Archeological Park of Copalita, it offers insights into the ancient civilizations that once thrived in the region.

The site, also known as Bocana del Río Copalita, was occupied from around 900 BCE to 1000 BCE. It is believed to have been an important coastal settlement for the Mixtec and Zapotec civilizations. The strategic location by the Copalita River provided a critical link for coastal navigation and trade (Rutopia editorial team, 2024) (Gazer, 2018).

Initial archaeological interest in the area was sparked by evidence of ancient artifacts surfacing naturally, prompting the Fondo Nacional de Fomento al Turismo (FONATUR) to begin formal excavations in 1994. These investigations, conducted in collaboration with INAH, revealed a variety of structures, including temples, ball courts, and sacrificial altars (Gazer, 2018) (Figueroa, 2024).

Key Structures and Features

- **Temples and Altars:** The site contains several temples and altars used for religious ceremonies and sacrifices. These structures highlight the spiritual practices of the ancient inhabitants.
- **Ball Court:** The presence of a ball court indicates that the Mesoamerican ball game, a significant cultural and religious activity, was practiced here.
- **Living Quarters and Public Spaces:** The site includes residential areas and public spaces, providing a glimpse into the daily lives of its ancient occupants (Gazer, 2018) (Figueroa, 2024).

In 2010, the site was officially opened to the public as the Eco-Archeological Park of Copalita. This development aimed to balance archaeological preservation with environmental conservation. The park, designed by renowned architect Mario Schjetnan, integrates the ruins with the natural landscape, allowing flora and fauna to coexist with the ancient structures. The park spans over 200 acres and includes dry forests, wetlands, and coastal areas (Rutopia editorial team, 2024) (Gazer, 2018).

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Today, the park serves both educational and touristic purposes. It features an interpretive center where visitors can learn about the site's history and view artifacts. The park's design emphasizes the relationship between the ancient civilization and its environment, making it a unique destination for understanding the cultural and ecological history of the region (Gazer, 2018) (Figueroa, 2024).

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Section 4.2 Archaeological and eco-tourism park Copalita

4.2.2 Management approach and partnerships

The archaeological site of Copalita opened its doors to the public in 2010, being managed in conjunction by two federal agencies: INAH and FONATUR. During the signing of the agreement for the co-management, the second clause determined to create a specialized commission for the supervision of this co-management strategy.

One major issue has been the balancing act between archaeological preservation (promoted by INAH) and environmental sustainability (Promoted by the *Fondo Oaxaqueño para la Conservación de la Naturaleza, FOCN*). The park was developed with a philosophy that integrates the preservation of natural habitats with the archaeological remains. This approach, led by landscape architect Mario Schjetnan, aims to maintain the ecological integrity of the area while making it accessible to the public. This has led to some debates on how much of the natural flora should be preserved, given that tree roots can eventually damage ancient structures (Rutopia editorial team, 2024).

Another significant point of contention has been the broader development projects in the Huatulco area. The Mexican government's initiative to develop Huatulco as a major tourist destination has included the creation of national parks and protected areas. However, these projects have faced protests from local communities and environmental groups who are concerned about the impacts on local ecosystems and the sustainability of such rapid development (Jackson, 2023) (Figueroa, 2024).

Additionally, the discovery and excavation of the Copalita site itself have brought challenges. Initial investigations by FONATUR and subsequent excavations revealed significant ruins, prompting debates on the extent and pace of archaeological work, especially given the site's potential for tourism and educational purposes (Gazer, 2018) (Figueroa, 2024).

In summary, the controversy at Copalita involves the intersection of preserving a valuable archaeological site, maintaining environmental sustainability, and managing the pressures of tourism development. This reflects broader challenges faced by many heritage sites around the world where cultural, environmental, and economic interests must be carefully balanced.

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The site was closed to the public in 2020 due to the lack of a strategy that would allow to protect the site's archaeological integrity and, flora and fauna. Since then, it has been managed by the *Fundacion Jaguares en la Selva, Ayudanos a que suceda A.C.* who had been rescuing the archaeological site, and it has also been integrated into the Protected Natural Area of Huatulco.

As of 2024, The federal government through FONATUR, has decided to hand all tourism projects to the statal government and Copalita will be part of a larger development plan in the Oaxaca coast which envisions the collaboration with private and third sector institutions but no agreements have been made regarding the Copalita Site.

Chapter 4 Case Studies
Section 4.2 Archaeological and eco-tourism park Copalita

Table 3. Summary: Archaeological and eco-tourism park Copalita

With information from (Figueroa, 2024) (Gazer, 2018) (Jackson, 2023) (Rutopia editorial team, 2024)

Name of the project	Archaeological and eco-tourism park Copalita		
Location	Copalita, Huatulco, Oaxaca, Mexico		
Date of construction start	900 BC - <beginning of occupation 1994 - Restoration works (Gazer, 2018)		
Date of opening to the public	2010 (Gazer, 2018) (closed to the public since 2020)		
Type of project	Public – Private – People Partnership		
Area of the project (m²)	809,371 (Gazer, 2018)		
Estimated investment	80 million MXN (approximately \$5.5 Million USD) (Gazer, 2018)		
Current Stage	Management, Closed to the public		
Project structure including governance	Currently, the site is managed jointly by INAH and FONATUR, with specific oversight by Project Director Raúl Matadamas Díaz for the archaeological aspects and Lic. Fernanda Corral Argüelles for the ecological stability of the area. The park integrates both ecological and archaeological elements, maintaining a balance between preserving historical structures and the natural environment (Gazer, 2018)		
Financing	funded primarily by FONATUR and supported by INAH. This investment helped in the excavation and development of the site into an eco-archaeological park		
Partners	Public Admin.	Private Entities	Third Sector
	INAH, FONATUR		FOCN & Fundacion Jaguares en la selva, Ayudanos a que suceda A.C.
	<i>Roles & Responsibilities</i>		
	Owners, financing, operation		operation
Project Summary	<p>The Project: the original project only contemplated the collaboration of 2 Federal institutions: on the archaeological side, INAH; on the tourism promotion side, FONATUR. FONATUR had agreed to maintain the archaeological site, while INAH only carried out research.</p> <p>Challenges: FONATUR faced many controversies such as giving more importance to the archaeological site than to the inhabitants of the place (Flora and Fauna), the commercialization of culture, and the protection of (Federally) Protected Natural Areas</p> <p>Why P4?: Because FONATUR was not able to consolidate the site with external pressures from the civic society, it was necessary to give temporary tenure to a Third Sector organization dedicated to the conservation of the natural heritage; putting a side for some time the archaeological research in the site.</p> <p>Project outcomes: As of 2024, The federal government through FONATUR, has decided to hand all tourism projects to the estatal government and Copalita will be part of a larger development plan in the Oaxaca coast which envisions the collaboration with private and third sector institutions but no agreements have been made regarding the Copalita Site.</p>		

4.3 Mitla archaeological site and caves

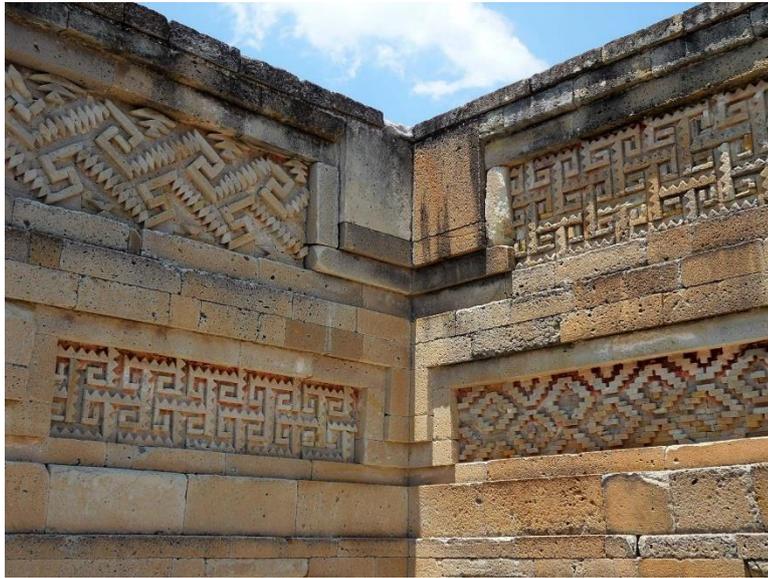


Figure 25. Stepped fret designs in the wall panels of Grupo de las Columnas, Mitla, Oaxaca, Mexico
(Gatepain, 2024)



Figure 26. Map of the location of the project
Elaboation of the author. Map data 2024 Google, INEGI

Chapter 4 Case Studies

Section 4.3 Mitla archaeological site and caves

4.3.1 Description

Mitla, an archaeological site in Oaxaca, Mexico, is renowned for its significant cultural and historical importance, primarily related to the Zapotec and Mixtec civilizations. The name Mitla derives from the Nahuatl word "Mictlán," meaning "Place of the Dead," reflecting its role as a major religious center where rituals and ceremonies related to death were performed (Roller, 2020) (Milligan M. , 2020).

Mitla's origins can be traced back to around 600 BCE, during the Classic Period when it started as a small, fortified village. Over time, it evolved into a large religious center characterized by a unique architectural style that combines Zapotec and Mixtec influences. The site includes several groups of structures, such as the Columns Group, the Church Group, the Arroyo Group, the Adobe Group, and the South Group. These groups contain intricate mosaic fretwork and geometric designs, which are among the most distinctive features of Mitla's architecture (Milligan M. , 2020) (Vigato, 2020).

The Columns Group, one of the most prominent groups, contains large courtyards surrounded by palace buildings. These structures are notable for their massive stone columns and elaborate mosaic decorations. The Church Group, named for the 16th-century Spanish colonial church built atop the ruins, also includes significant pre-Hispanic structures and demonstrates the blending of indigenous and colonial architectural styles (Milligan M. , 2020) (Vigato, 2020) .

Mitla served as a crucial ceremonial center for the Zapotecs and later the Mixtecs. It was a site for various religious rituals, including human sacrifices, as part of their spiritual and cultural practices. The Spanish conquest in the early 16th century led to the destruction and repurposing of many indigenous structures, including the construction of the Church of San Pedro on the site (Roller, 2020) (Vigato, 2020).

Archaeological research at Mitla has revealed extensive subterranean structures, including tombs and chambers used for religious purposes. The ARX Project, in collaboration with INAH and UNAM, has conducted geophysical surveys uncovering anomalies that suggest the existence of additional underground chambers. These findings provide insights into the complexity and scale of Mitla's ancient construction (Vigato, 2020).

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Today, Mitla is recognized as a UNESCO World Heritage site, highlighting its outstanding universal value as a cultural landmark that offers a glimpse into the advanced architectural and ceremonial practices of the ancient Zapotec and Mixtec civilizations (UNESCO World Heritage Convention, 2010).

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Section 4.3 Mitla archaeological site and caves

4.3.2 Management approach & partnerships

The archaeological site of Mitla in Oaxaca is managed and administered by several institutions, each playing a crucial role in preserving and researching this significant cultural landmark.

Primarily, INAH is the principal authority responsible for the oversight and protection of Mitla. INAH engages in the archaeological excavations, conservation efforts, and the management of the site to ensure its preservation for future generations (UNESCO World Heritage Centre) (Vigato, 2020).

Additionally, the ARX Project, a collaborative effort involving multiple academic and research institutions, has been instrumental in conducting detailed studies and excavations at Mitla. This project has led to significant discoveries, such as the identification of potential subterranean chambers and earlier construction phases of the site (Vigato, 2020). The Universidad Nacional Autónoma de México (UNAM) also participates in research activities at Mitla. Together with INAH and the ARX Project, UNAM contributes to archaeological investigations and the development of strategies for mitigating seismic and geological risks in the area (Vigato, 2020). For the purpose of this thesis, we will consider the ARX Project and the UNAM as Third Sector Institutions.

Furthermore, the local government of Oaxaca supports the site's administration by facilitating tourism and promoting cultural heritage initiatives. This involves collaboration with national institutions to enhance the visitor experience while safeguarding the integrity of the archaeological zones (Roller, 2020) (Milligan M. , 2020).

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Table 4. Summary: Mitla Archaeological site and caves

With information from (Milligan M. , 2020) (Vigato, 2020) (Roller, 2020)

Name of the project	Mitla Archaeological site and caves		
Location	San Pablo Villa de Mitla, Oaxaca, Mexico		
Date of restoration start	1920s		
Date of opening to the public	1980s		
Type of project	Public – Private – People Partnership		
Area of the project (m²)	1,200		
Estimated investment	Information regarding the exact amount of money invested into the Mitla project and the specific sources of these funds is not readily available in detailed public records.		
Current Stage	Execution – Management		
Project structure including governance			
Financing	Funding for the restoration and conservation of Mitla has come from various sources, primarily managed and supported by INAH. For Mexico's bicentennial celebrations in 2010, INAH intensified efforts to conserve the ancient ruins . Additionally, new studies and conservation projects are often supported by research grants and international collaborations.		
Partners	Public Admin.	Private Entities	Third Sector
	INAH	Universidad Nacional Autonoma de Mexico (UNAM)	Community commission
	Roles & Responsibilities		
	Owners, financing, operation of the research center		Financing, maintenance of the archaeological site, operation of the Museum, additional tourism services such as guided tours
Project Summary	<p>The Project: The project is simple, INAH is the institution who provides scientists such as archaeologists, and technicians for the research center and meticulous preservation of the archaeological site. INAH is the provider of most of the resources which it obtains from applications to federal programs dedicated to the conservation of Protected Natural areas, Archaeological sites situated in rural communities and cultural heritage of indigenous communities. On the other hand, the municipality of Mitla has established a commission for Mitla and the neighboring site of Yagul, to coordinate the operation of the Museum, Maintenance of both of the sites, tourism services such as guided tours, etc. Most of the management is supervised by this community commission which works with voluntary groups organized as Tequio.</p> <p>Challenges: The location of the site in a seismic zone and prone to natural fires, requires the continuous interventions of specialized manual work. Other challenges include the lack of laws or legislative provisions to preserve the Protected Natural Area from degradation and the lack of supervision of the Urban sprawl towards this area</p> <p>Why P4? The location of this archaeological site in a rural community makes it difficult for the introduction of private partners, because of the <i>usus y costumbres</i> granted to rural communities to auto-govern. Also, there is a strong sense of belonging and appropriation to the site the community prefers to manage the site itself with the aid of the federal government as the INAH.</p> <p>Project outcomes: As of August 2024, the site is currently being managed as a conjoint effort between INAH and the Community Commission which is constantly putting it self forward to maintain the site and control the wild fires of 2024.</p>		

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Section 4.3 Mitla archaeological site and caves

4.4 Monte Albán archaeological site



Figure 27. Monte Albán Panoramic View
(Von, 2010)

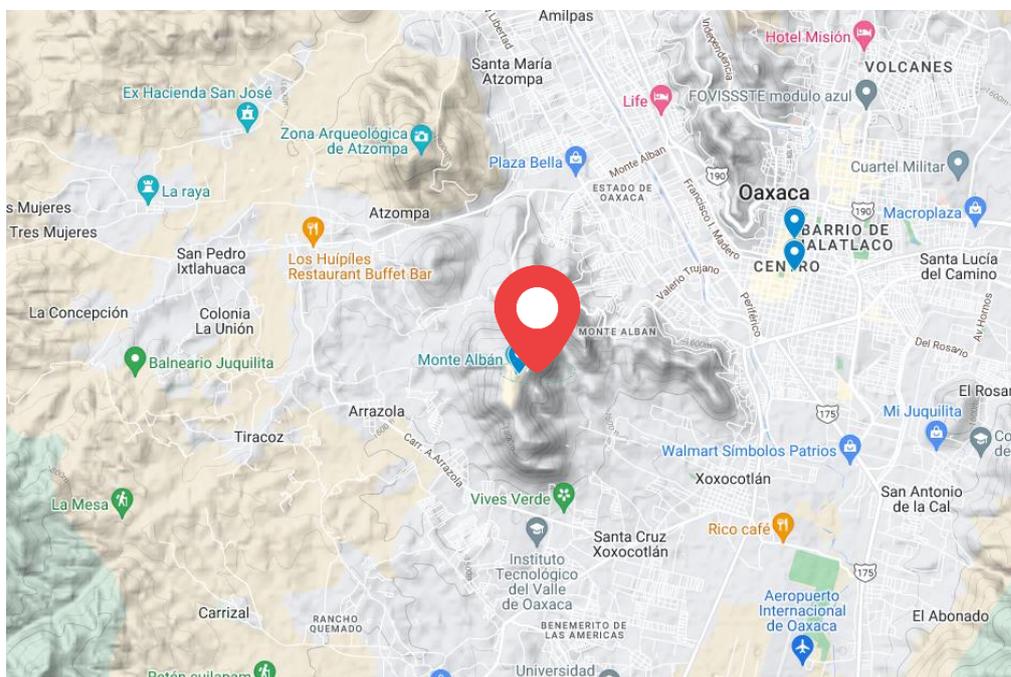


Figure 28. Map of the location of the project.
Elaboration by the author. Map data 2024 Google, INEGI

Chapter 4 Case Studies
Section 4.4 Monte Albán archaeological site

4.4.1 Description

In interviews with Dr. Pacheco Arias, he tells us the story of Monte Albán, his experiences managing it in conjunction with Atzompa (an archaeological site in the vicinity of Monte Albán), and the efforts made with the community.

Monte Alban is located in the Central Valley region of Oaxaca. It was the most important city for the Zapotecan Culture in the pre-Colombian era. Located in the municipality of Xoxocotlán, Oaxaca, it is surrounded by 3 naturally occurring hills called "Monte Albán", "El Gallo" and "Bonete" (also known as "Atzompa").

The oldest settlement to have been discovered dates back to the years 500 to 100 B.C., period which is often referred as "I Era". Settlements of this era were located near the natural resources such as fertile lands for agriculture, bodies of water and dense vegetative areas. The residential architecture was mostly built from easily withering materials, such as wood and straw but would later be replaced for more sturdy materials such as rock, "adobe" and plaster. In the first settlements, social class division and handicraft specialization already existed; this would allow for the execution of large scale public civil projects.

The II Era goes from 100 B.C. to 200 A.C., in which Monte Albán's society shows significant evolution. New civil structures are built, and old ones were modified. The most representative structure in the Great Plaza is the Monument J. Ceramics tradition was continued during this period but significantly evolved into other types, such as funeral urns. The use of tombs in the II Era follows the forms of the previous era but incorporating new elements such as small cavities.



Figure 29. Court of the Juego de Pelota
(Campos)

The city reaches its most population and urban development during the III Era, which goes from 200 to 600 A.C. It is speculated that the number of inhabitants was around 40 thousand in an area of approximately 20 km². The most important buildings were concentrated in the densest areas and their main use was ceremonial, public or residential. The hill sides were mostly used for agriculture, and followed a similar form to those in Machu Picchu, as platforms or terraces. Not only was this the most populated era, but during this time Monte Albán was the most important urban centre in the region of the Central Valleys (Valles Centrales). Today, the archaeological site and museum is located in the "heart" of the ancient city and is made up of temples in the form of pyramids, residential palaces, stone tombs, elaborate systems for the control and storage of water, sport centres for the "juego de pelota", and monumental structures for astronomical observation (Sistema de Información Cultural México, 2023).

Oaxaca is one of the southern Mexican states that are part of the seismic zones of the country. Other states include Mexico state, Colima, Michoacán, Guerrero, Morelos, Oaxaca Veracruz, Chiapas, Jalisco,

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Puebla, and Mexico City. Because of this natural risk, the architecture has adapted throughout the centuries to use thicker walls, and tends to be short in vertical size, and robust.

The Historic city centre of Oaxaca and the Archaeological site of Monte Albán have been part of the World Heritage list of the UNESCO since 1987 for the following 4 criteria:

1. The city of Oaxaca first town in the New Spain to have blocks of 100 yards per side and centred around a main square, where economic, political, and religious powers reside. Because of the grid-layout, the city is a unique example of the urban planning in the New Spain in the XVI century.
2. According to UNESCO, Monte Albán was a highly influential place for the entire area of Oaxaca. The archaeological site's ceremonial centre provides the landscape a unique grandiose architectural view.
3. Monte Albán was heavily influenced by cultures such as Teotihuacan in the north, and the Mayans in the south. As previously mentioned, the site is home of monumental temples, tombs, engraved stones which bears unique testimony to the successive civilizations occupying the zone during the pre-classic and classic periods.
4. Monte Albán stands out from the approximately 200 pre-Hispanic archaeological sites in the state, because within its ruins it is possible to see the evolution of a city hosting 3 distinct cultures: the Olmecs, Zapotecs and Mixtecs. Furthermore, the city centre of Oaxaca is also an icon of the clash of two cultures, being the American Indian and Spanish.

4.4.2 Management approach & partnerships

Thanks to the efforts of conservation and management, the archaeological site of Monte Albán has been very well preserved and the plans are centered around maintaining its physical integrity. Furthermore, the management plan focuses on efforts of social management, particularly to defend along with the communities, the archaeological heritage from development; the plan also provides for archaeological investigation, conservation and maintenance of the site (UNESCO, n.d.).



Figure 30. Monte Albán ceremonial centre
(Gray)

Program for the attention to the Protection Polygon

In the area surrounding the archaeological site of Monte Albán, the land tenure is typically of social nature, that is ejidal and communal land; this is a modality of land tenure established during the post-revolutionary era in Mexico and it is characterised by being land oriented to the production and community developments. Their type of governance follows the constitutional right of Mexican rural communities to auto-govern based on their traditions and customs, which has been the subject of many

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debates where the rights of rural communities come into question between themselves, and between them and nation's obligations.

Because of this, in 1997 a plan was developed to attend the national and international safeguard of World Heritage and the surrounding areas. The plan makes a point to include these rural communities in the vigilance and to prevent illegal invasions caused by the uncontrolled urban sprawl of the suburbs of Oaxaca. It was also developed because of the lack of municipal intervention and the lack of effective plans to control the anarchical growth within the protected zones. The initiative is based on a permanent project based on the traditional practices of vigilance and assumption of collective agreements. This has allowed the program to be an effective way of interaction between the nation and rural communities.

The program takes into consideration the needs and requirements of all stake holders, which include municipalities, agrarian organizations, neighbourhoods, etc. and has established the relationship between them and the Zones of Monte Albán and Atzompa. Social landscape is the term used to name the set of stakeholders, agreements, methods of communication and organization surrounding the cultural and natural heritage sites. This social landscape has allowed to develop tailored programs of management for each group.

Today, the communities participate in the rescue, preservation, and other types of archaeological work in a traditional community participation named "Tequio", specific to the state of Oaxaca. It is a form of non-paid community service that each inhabitant must perform as part of their duties as citizens of a municipality. Thanks to this form of participation, local communities have been directly involved in archaeological activities such as excavations, tours, and restoration, which in turn has been used by the scholars and governmental institutions to sensitize these communities and have them participate in other programs to determine uses that are compatible with the conservation of the site, investigation, education, and sustainable tourism.

Since its opening in 2012 the archaeological site of Monte Albán has been managed as a collaboration between the public sector and the community; the first one managing the monumental site and guaranteeing its professional supervision, as well as the proper

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development of the projects, plans and programs put in place for the World Heritage site; while the latter handles the Community Museum through a commission put in place by the community itself.

Although this modality has been successful thanks to the good relationship between public institutions and local organizations, the current law of Monuments and Archaeological sites (1972) still lacks effective ways of governing these types of agreements. It is very important to pay attention to this aspect since much of the Mexican cultural heritage is surrounded and in some cases are used by communities that auto-govern themselves.

2017 Earthquake management plan

On September 7, 2017, the city was struck by an 8.2 magnitude earthquake, severely damaging many archaeological sites, such as Atzompa, the Main Plaza of Monte Albán and other nearby sites. Because of this, several efforts to restore the sites have been put into place, including the 2018 Watch of Disaster sites of the Caribbean, the Gulf and Mexico (by the World Monuments Fund) and a donation from American Express. Furthermore, in partnership with INAH, several projects for the long-term stability of the site have surfaced, which focus on the physical conservation, documentation, geological assessment, and capacity building.

The involvement of the public, private and third sectors has been outstanding, involving educational institutions such as Universidad Nacional Autónoma de México (UNAM), Instituto Tecnológico de Oaxaca (ITO), and Universidad Autónoma “Benito Juárez” de Oaxaca (UABJO); American Express as a private institution; and from the third sector, the World Monuments Fund and the Robert W. Wilson Trust.

The project called Earthquake Recovery, Stabilization, and Conservation at Monte Albán and Atzompa, developed by the 2018 Monuments Watch and INAH, aimed at developing geoarchaeological studies and technology, will improve the site’s resiliency for future earthquakes. This project was put forward with a team of local professionals which have documented the damage to the sites and have come up with a management plan for the long-term stabilization. These professionals have studied the structures and the ground underneath to better understand the needs of each building.

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A 1 million USD donation was made by the combined efforts of American Express, Roberto Hernández Ramírez y Claudia Madrazo de Hernández, and the Robert W. Wilson Trust. This donation was made to develop a collaboration project with INAH for the long-term management of Monte Albán, which will include physical conservation, documentation, geological evaluation, and development of technical capabilities of specialists. This donation has been used to acquire cutting edge technology which allowed the archaeological and architectonic study and documentation, as well as the geophysical studies that allowed to visualize the subsoil, which in turn have allowed to develop intervention strategies for the damaged monuments and the execution of the project titled “Conservation of the buildings damaged by the 2017 earthquakes in the archaeological zones of Monte Albán – Atzompa” (Robles García, et al., 2022). The specialists report that one of the main issues during the development of the project was to find optimal spaces in Monte Albán which was solved by integrating the research centre with the one in Atzompa, increase the solar energy captured, and increase the number of batteries

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Table 5 . Summary: Monte Albán archaeological site

Name of the project	Monte Albán archaeological site		
Location	Oaxaca, Oaxaca, Mexico		
Date of restoration works	1931 (World Monuments Fund, 2023)		
Date of inauguration	1933 (World Monuments Fund, 2023)		
Type of project	Public – Private – People Partnership		
Area of the project (m²)	6,500,000.00 (World Monuments Fund, 2023)		
Estimated investment	Information regarding the exact amount of money invested into the Monte Albán project and the specific sources of these funds is not readily available in detailed public records. Although it is known that for the 2017 earthquake, the WMF provided 1 million USD.		
Current Stage	Management- Restoration		
Project structure including governance	The site is managed by INAH, which oversees the conservation, documentation, and interpretation efforts. It works in collaboration with various organizations, including the World Monuments Fund and the Alfredo Harp Helú Foundation, along with local academic institutions such as the Instituto Tecnológico de Oaxaca (ITO) and the Universidad Autónoma Benito Juárez de Oaxaca (UABJO) (UNESCO, n.d.) (World Monuments Fund, 2023).		
Financing	The investment into Monte Albán's restoration and management has been substantial. For instance, following the earthquakes in 2017, American Express provided 1 million USD to support preservation efforts, focusing on the long-term stability of the site (World Monuments Fund, 2023). The site has also benefited from funding by the World Monuments Fund, the Robert W. Wilson Challenge to Conserve Our Heritage, and the Alfredo Harp Helú Foundation (World Monuments Fund, 2023).		
Partners	Public Admin.	Private Entities	Third Sector
	INAH	American Express	World Monuments Fund, UNAM, Instituto Tecnológico de Oaxaca (ITO), Universidad Autónoma Benito Juárez (UABJO), Robert W. Wilson Trust, Community council
	<i>Roles & Responsibilities</i>		
	Owners, financing, research		Operation, financing, research,
Project Summary	<p>The Project: the archaeological site is mainly managed by INAH, as well as the tourist center. The community council of diverse municipalities coordinate the supervision of the surrounding area of the archaeological site, as well as the Protected Natural Areas; through tequio, they are able to help INAH maintain the archaeological site and offer guided visits but in relationship with other sites of similar nature, the community councils are not involved because having so many of them makes it difficult to come to agreements.</p> <p>Challenges: Being in a highly seismic zone, and at such a high altitude with respect to the City of Oaxaca, it requires many interventions by specialists to stabilize the site and repair the damage caused by the continuous earth movements. Another challenging situation is the location of the site, because it is in several different rural municipalities that are governed by the <i>Usos y Costumbres</i>. This makes it difficult for state and federal governments to implement policies, since they are not allowed to interfere with how the municipalities auto-govern.</p> <p>Why P4? The location of the site (in auto-governed communities) makes it so that all the decisions must be passed through the community council and by INAH, making it <i>per se</i> of P4 nature.</p> <p>Project outcomes: as of August 2024, many international organizations have understood the relevancy of the site to the world history, making it the center of many donations from international NGOs. Since the site's discovery, it has been listed as a World Monument, and several collaborations have been</p>		

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	developed with the neighboring archaeological site of Atzompa, with whom they share in
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4.5 Yagul archaeological site and caves



Figure 31. Panoramic view of the ruins of the City Yagul
(Unknown, *Vista de la Zona Arqueológica de Yagulen el valle de Tlacolula, en el estado de Oaxaca.*, 2021)

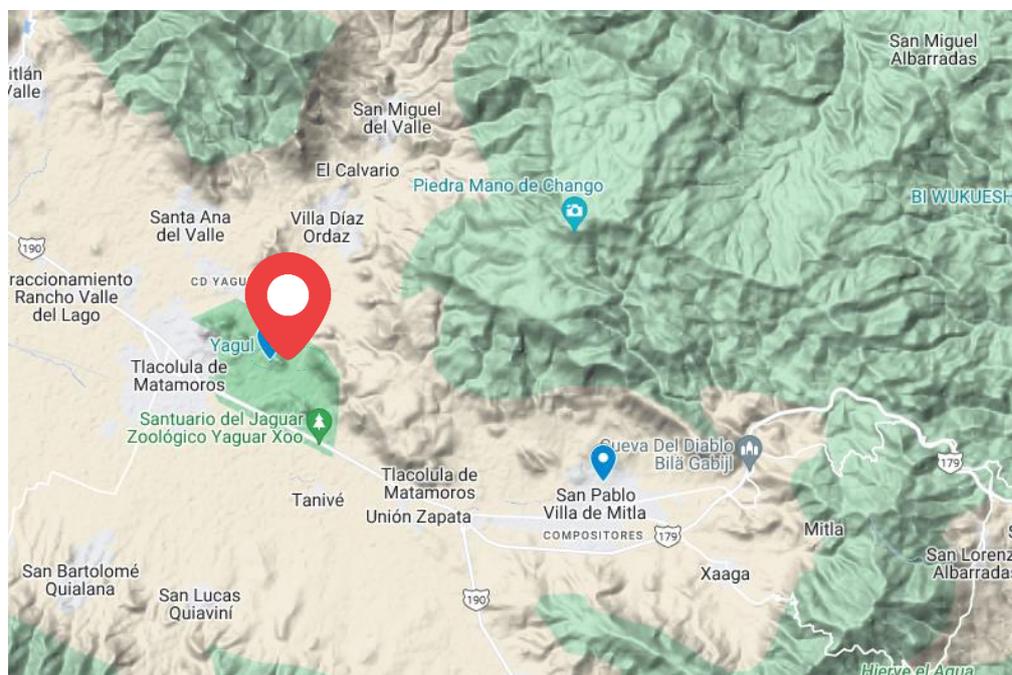


Figure 32. Map of the location of the project
Elaboation of the author. Map data 2024 Google, INEGI

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Section 4.5 Yagul archaeological site and caves

4.5.1 Description

The archaeological site of Yagul, located in the Valley of Oaxaca, Mexico, has a rich history tied to the Zapotec civilization. The site was primarily occupied after the decline of the prominent Zapotec center, Monte Albán, around the 8th century AD, and it continued to be an important regional center into the Postclassic period (900-1521 AD). Yagul features a variety of structures, including residential complexes, temples, and one of the largest Mesoamerican ball courts. The site is particularly noted for its fortifications and a unique palace complex known as the "Palace of the Six Patios" which demonstrates the advanced architectural and urban planning skills of the Zapotecs. The site's layout includes a citadel situated on a hill, offering strategic defense advantages and a commanding view of the surrounding valley (Catchpole & Mohl, 2011) (Encyclopedia, 2024).



Figure 33. Ball court at Yagul, Oaxaca
(Sousa, 2004)

According to Archaeologist, Dr. Daniel Pacheco Arias, in interviews conducted during the months of June-August 2024, excavations led by

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archaeologists such as Ignacio Bernal and Lorenzo Gamio in the 1950s and 1960s provided significant insights into the site's historical context. These excavations revealed intricate tombs, including Tomb 30, which is decorated with murals and offers a glimpse into the mortuary practices and social hierarchy of the Zapotec society.

The site's connection to the UNESCO World Heritage designation as part of the "Prehistoric Caves of Yagul and Mitla" further emphasizes its significance, highlighting the region's transition from nomadic hunter-gatherer communities to settled agricultural societies (Catchpole & Mohl, 2011). This broader designation includes nearby prehistoric caves that offer evidence of early plant domestication and the development of complex societies.

In sum, Yagul serves as a testament to the ingenuity and resilience of the Zapotec civilization, preserving a wealth of historical, architectural, and cultural information crucial for understanding the pre-Columbian history of Mesoamerica.

4.5.2 Management approach & partnerships

The site is managed and administered primarily by INAH, which oversees the site's maintenance, restoration projects, and public accessibility, ensuring that the site is preserved for both research and tourism purposes (UNESCO World Heritage Convention, 2010)

Management strategies at Yagul also involve collaboration with local Zapotec communities. These communities participate in various aspects of the site's administration, including monitoring, conservation, and promotion efforts. This community involvement is crucial for fostering good governance and sustainable practices (Pacheco Arias L. , 2023).

During an interview with the Archaeologist Daniel Pacheco, Yagul and the surrounding area were going through a wild-fire emergency. According to his account, this active participation of the community was crucial to control the damage. In Mexico, this type of citizens participation is called *Tequio*, and it refers to a traditional system of communal labour found in many Indigenous and rural communities in Mexico. It is derived from the Nahuatl word "tequitl," which means work or duty. This practice involves community members voluntarily coming together to work on projects that benefit the entire community. These projects can include building or repairing infrastructure, such as roads, schools, and water systems, as well as organizing community events and maintaining communal spaces.

Furthermore, Yagul is also designated as a natural monument and is administered by the National Commission of Protected Natural Areas (CONANP), which focuses on the preservation of its natural landscape alongside its cultural heritage. This dual management approach helps balance the preservation of both its archaeological significance and its natural environment (Robles Garcia, 2010) (UNESCO World Heritage Convention, 2010).

It is important to highlight that no Private for-profit institutions are involved in the management or funding of the project. During interviews with Dr. Pacheco Arias, he mentions that the reason for this is that other archaeological sites have not had a good experience when holding responsible the private partners, he specifically mentions the case of Copalita, Huatulco.

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Table 6. Summary of the Archaeological site of Yagul

With information from (Pacheco Arias L. D., 2024)

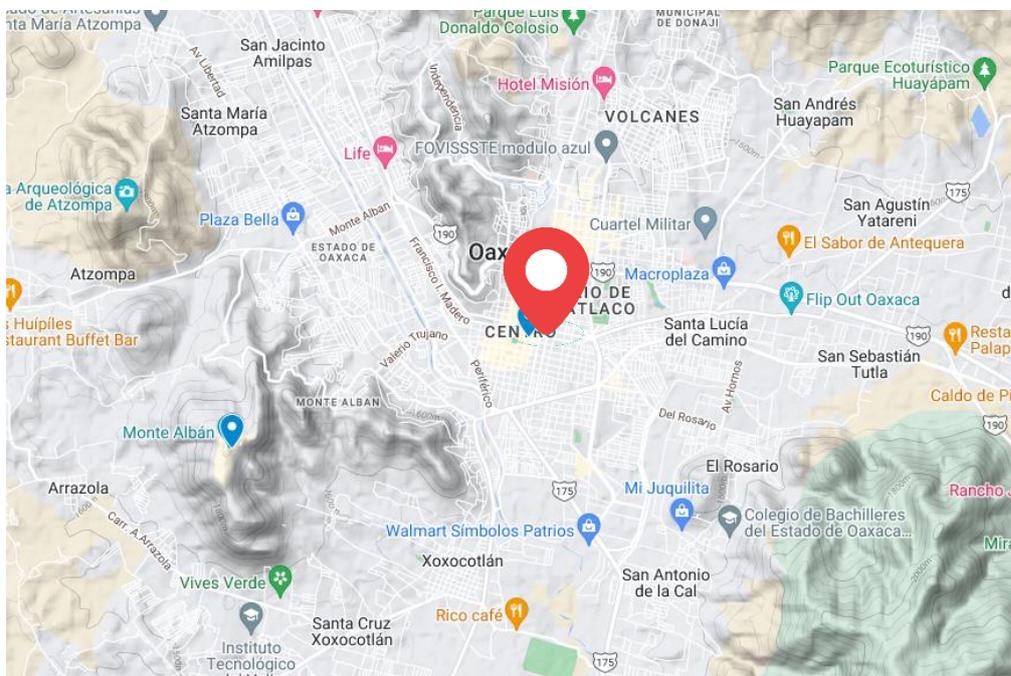
Name of the project	Archaeological Zone of Yagul		
Location	Ciudad Yagul, Oaxaca, Mexico		
Date of restoration start	1954		
Date of opening to the public	1974		
Type of project	Public – Private – People Partnership		
Area of the project (m²)	10,000,000.00		
Estimated investment	Information regarding the exact amount of money invested into the Yagul project and the specific sources of these funds is not readily available in detailed public records.		
Current Stage	Execution		
Project structure including governance	Several parties are typically involved in the site's management, including: INAH: The primary managing public body, responsible for overall oversight. Local Government: Provides support and infrastructure for tourism and site maintenance. International Organizations: Entities such as UNESCO and various non-governmental organizations may provide funding, expertise, and support for conservation projects.		
Financing	The funding typically comes from a combination of federal, state, and international sources, including grants and donations aimed at archaeological preservation.		
Partners	Public admin.	Private	Third sector
	INAH, CONANP		Community council, World Heritage, UABJO
	<i>Responsibilities</i>		
	Owners, specialized technical labor, financing		Technical labor, maintenance of the site. Tourism services such as guided visits and Museum management
Project outcomes	<p>The Project: in collaboration with the neighboring archaeological site of Mitla, INAH and nternational NGOs have put in place a plan to maintain and repair the archaeological site and Protected Natural Area. There is a heavy community involvement because there is a strong sense of belonging and appropriation; locals understand that the site can be a source of income for the spilled economic benefits of having an archaeological site in their municipality.</p> <p>Challenges: Being in a highly seismic zone, and at such a high altitude with respect to the City of Oaxaca, it requires many interventions by specialists to stabilize the site and repair the damage caused by the continuous earth movements. Another challenging situation is the location of the site, because it is in several different rural municipalities that are governed by the <i>Usos y Costumbres</i>. This makes it difficult for statal and federal governments to implement policies, since they are not allowed to interfere with how the municipalities auto-govern.</p> <p>Why P4? The location of the site (in auto-governed communities) makes it so that all the decisions must be passed through the community council and by INAH, making it <i>per se</i> of P4 nature.</p> <p>Project outcomes: As of 2024, the community council and INAH collaborated to put a stop to the wild fired of summer 2024. The site has also been listed as a World Monument since 2010</p>		

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Section 4.5 Yagul archaeological site and caves

4.6 Cultural centre of San Pablo, Oaxaca



*Figure 34. Cloister of Ex-convent of San Pablo
(León, 2016)*



*Figure 35. Map of the location of the project
Elaboration of the author. Map data 2024 Google, INEGI*

4.6.1 Description

The Ex-Convent and Temple of San Pablo in Oaxaca, Mexico, holds a significant place in the historical and cultural tapestry of the region. Founded in 1529, it is recognized as the first convent established by the Dominican Order in Oaxaca. Over the centuries, the site has undergone numerous transformations, reflected the complex history and evolved cultural landscape of Oaxaca.

The Dominican presence in Oaxaca began with the arrival of Fray Bernardino de Minaya, who facilitated the establishment of the convent. The site originally hosted the Convento de Santo Domingo Soriano, established in 1529, making it the second Dominican foundation in the Americas. The monastery was later dedicated to Saint Paul, leading to its current name, Ex-Convent of San Pablo. The convent served as a parish for the indigenous population from 1529 to 1757, playing a crucial role in the religious and cultural life of the region. It was a hub for proto-academic activities, including the study of Mixtec, Zapotec, and Nahuatl languages, and it supported significant botanical and medical research (GPS My City, n.d.) (The not so innocents abroad, 2022).

Architecturally, the Ex-Convent of San Pablo is a testament to the enduring influence of colonial design. The building combines traditional Dominican architectural elements with local construction techniques, using materials such as adobe and stone. The original structure suffered significant damage due to earthquakes in the early 17th century, necessitating extensive repairs and modifications. Despite these challenges, elements of the original design, such as the courtyards and cloisters, have been preserved and integrated into the modern restoration efforts (Oaxaca Mio, 2011) (The not so innocents abroad, 2022).

The restoration, from 2006 to 2011, of the Ex-Convent of San Pablo was a meticulous and complex process, aimed at preserving its historical integrity while adapting it for contemporary use. Led by architects Mauricio Rocha and Gabriela Carrillo, the restoration project sought to balance the old and the new, integrating modern elements with the historical fabric of the building. This approach involved using reversible construction techniques and materials, such as metal and wood, to create a "clean" space that respects the original structure's spirit. The project has been recognized for its architectural excellence, earning awards such as the World Architecture Festival's Building of the Year Award in the

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Culture category in 2018 (The not so innocents abroad, 2022) (MXCity, n.d.).

Today, the Ex-Convent of San Pablo is a vibrant cultural and academic centre, housing the Centro Cultural San Pablo. This centre serves as a multifunctional space for cultural events, exhibitions, and academic research. It includes the Biblioteca de Investigación Juan de Córdova, dedicated to preserving and promoting the cultural heritage of Oaxaca and Mexico. The cultural centre hosts a wide range of activities, from art exhibitions and concerts to language courses and academic conferences, making it a dynamic hub for both locals and visitors (Oaxaca Mio, 2011) (The not so innocents abroad, 2022).

The transformation of the Ex-Convent of San Pablo into a cultural centre has had a profound impact on the community. It has become a focal point for the preservation and celebration of Oaxacan culture, particularly its indigenous heritage. The cultural centre's programming emphasizes the diversity and richness of local traditions, providing a platform for artists, scholars, and cultural practitioners to engage with the public. This effort is supported by the Alfredo Harp Helú Foundation, which has invested significantly in the restoration and operation of the centre (The not so innocents abroad, 2022).

For visitors, the Ex-Convent of San Pablo offers a unique blend of historical exploration and contemporary cultural engagement. The site's architectural beauty, combined with its rich program of cultural activities, makes it a must-visit destination in Oaxaca. The Centro Cultural San Pablo frequently hosts concerts, art exhibitions, film screenings, and workshops, providing a lively and enriching experience for all who visit. Additionally, the Oaxaca Textile Museum, located within the same complex, offers insights into the region's textile traditions, further enhancing the cultural significance of the site (GPS My City, n.d.) (The not so innocents abroad, 2022).

The Ex-Convent and Temple of San Pablo is more than just a historical monument; it is a living testament to the rich cultural heritage of Oaxaca. Its transformation from a religious convent to a thriving cultural centre illustrates the dynamic interplay between preservation and innovation. As a site of historical, architectural, and cultural importance, it continues to play a vital role in the community, offering a space where the past and present converge to create a vibrant future.

4.6.2 Management approach and strategies

The Cultural Center of San Pablo in Oaxaca is managed by the Fundación Alfredo Harp Helú Oaxaca (FAHHO), a private philanthropic foundation dedicated to the preservation and promotion of Oaxacan culture, arts, and history. The foundation, established by the philanthropist Alfredo Harp Helú, oversees the operations, programming, and maintenance of the center. However, being a building that was constructed for religious purposes during the colonial period, it is by law property of the state but give FAHHO the tenancy of the site.

The management approach of FAHHO emphasizes community engagement, accessibility, and the celebration of Oaxaca's rich cultural heritage. This includes not only visual arts but also indigenous languages, music, and literature, making the Cultural Center of San Pablo a key institution in Oaxaca's cultural landscape.

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Table 7. Summary of the project: Cultural center of San Pablo,
With information from (Fundación Alfredo Harp Helú Oaxaca), and (Agencia El universal, 2016)

Name of the project	Cultural Center of San Pablo		
Location	Oaxaca, Oaxaca, Mexico		
Date of construction start	1529 – Construction of the first building 2006 – Restoration works		
Date of inauguration	2011		
Type of project	Private initiative		
Area of the project (m²)	700 m ² of useful space, divided into 3 levels		
Estimated investment	Total \$186 Million (MXN): \$54,50 million for the acquisition of the buildings by HARP-HELÚ foundation and \$132 million for the rescue and adaptation.		
Current Stage	Operation		
Description	<p>The convent and temple of San Pablo was the first convent in the city and the site has the first evidence of human occupation around the city of Oaxaca. Since the donation of the site to the Dominical order of the catholic church in 1529, it was a church that served for the evangelization of the indigenous population that lived in the surrounding towns of the city. In the XVI century it was an educational center for the languages of Mixteco, Zapoteco and Nahuatl. It was not until the construction of other religious centers in the towns of Etlá and Cuilapan that the site started to be sold in sections during the XVIII century, to fund the new temple of Santo Domingo de Guzmán. From 1830 to 1860, it hosted part of the Institute of Sciences and Arts of Oaxaca, the predecessor of the first University in the state.</p> <p>In 2012, the rescue of most of the site was finished by the INAH, and from 2006 until 2014 the Foundation Alfredo Harp Helú Oaxaca (FAHHO) acquired the property and currently uses it as their operations center.</p>		
Project structure including governance	Since 2006, the FAHHO started acquiring the property and together with INAH started the rescue of the ex-convent and temple, to be reddestined into a cultural centre that includes a library, a museum, a store, and a restaurant. The project governance has been simple since FAHHO is the owner of the property and only involved the PA through the INAH to rescue the buildings.		
Financing	FAHHO provided all the investment		
Partners	PA	Private entities	Third Sector entities
	INAH		FAHHO
	Roles & responsibilities		
	Historical and technical knowledge.		Owner, tenant search and approval, operation, financing, historians, and technicians.
Project Summary	<p>Approach, conservation issues, rationale for P4</p> <p><i>The project:</i> The rescue of the ex-convent and church was ordered by FAHHO (owner) who looked for historical and technical knowledge from the INAH. It currently is the centre of operation of FAHHO, spaces for cultural expositions, an extension of the Investigation Library Juan de Córdova, and the Cultural Center San Pablo.</p> <p><i>Challenges:</i> Since the property had been, all the site was in hands of privates and had to be bought entirely by the FAHHO. What is left of the whole site is in the middle of residential and commercial buildings, with a limited access and visibility from the street. The ex-convent, specifically the cloister, was partially demolished which had to be completely rebuilt and experts from INAH had to be called to help provide the adequate knowledge.</p> <p><i>Why P4?</i> Ownership of the project obligates it to be a P4 since it is in hands of a third-sector institution: Foundation Alfredo Harp Helú Oaxaca. What makes it a partnership, is the fact the FAHHO looked for the technical and historical knowledge in the INAH.</p>		
	Project Outcomes		

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Section 4.6 Cultural centre of San Pablo, Oaxaca

The site is now a thriving complex visited by many national and international tourists. It has received many national and international prizes including: in 2012 the National Prize Francisco de la Maza from INAH for the best work of conservation of the architectural and urban heritage (Grañén Porrúa, López Nogales, & Vichido Hernández, 2012), in 2013 it was awarded the 22 edition of the Obras CEMEX award in the category of Social impact (Quadratin Oaxaca, 2013), in 2016 it received the Iberoamerican CIDI award for Emblematic Work of the Year (Loera y Chávez, 2016), and in 2018 it was awarded the Latin-American prize of Architecture of Rogelio Salmona (ArchDaily Team, 2018).



Figure 36. Restaurant at Cultural Center San Pablo
(León, 2016)



Figure 37. Cultural Center of San Pablo
(León, 2016)

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Section 4.6 Cultural centre of San Pablo, Oaxaca

4.7 Ex-convent and temple of Santo Domingo de Guzman, Chiapas



Figure 38. Temple and ex-convent of Santo Domingo de Guzman (El Heraldo, 2023)

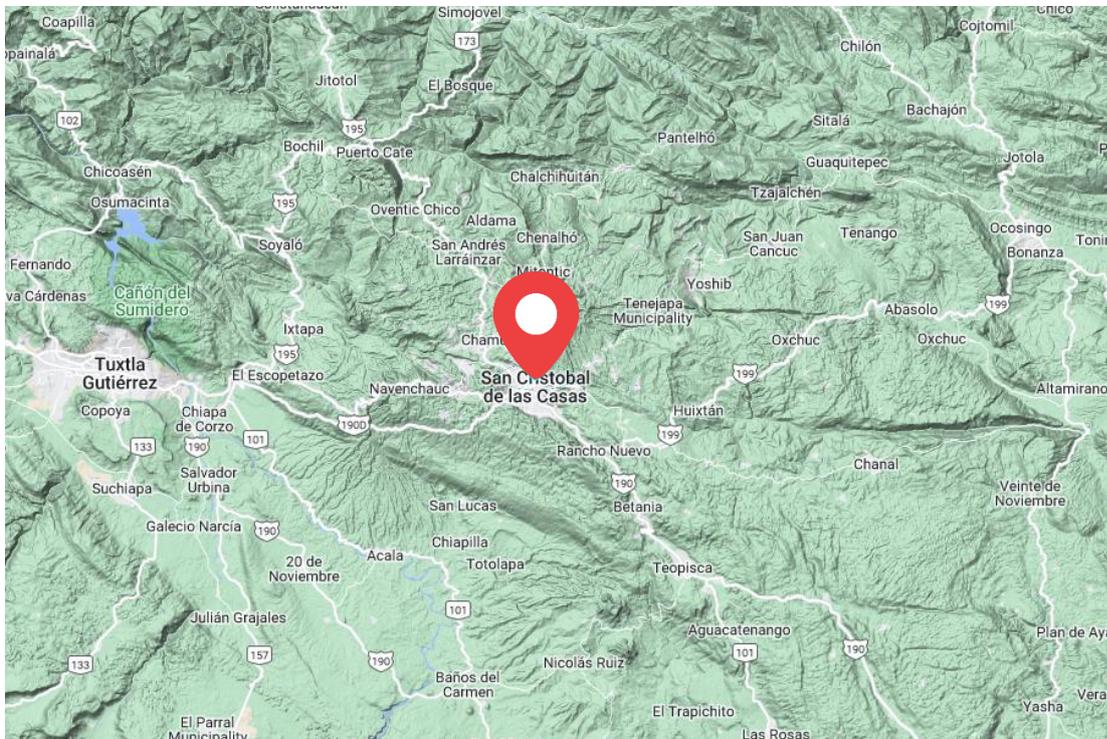


Figure 39. Map of the location of the project (Elaboration of the author. Map data 2024 Google, INEGI)

4.7.1 Description

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Section 4.7 Ex-convent and temple of Santo Domingo de Guzman, Chiapas

The Ex-Convent of Santo Domingo de Guzmán in Chiapas, Mexico, is a site of great historical and architectural significance. Located in the town of Chiapas de Corzo, it is one of the earliest and most important convents established by the Dominican Order in the region.

The construction of the Ex-Convent of Santo Domingo de Guzmán began in 1548, following a decree from Spain that granted the Dominicans permission to establish convents in Chiapas. This convent was one of the key religious centres in the area, playing a crucial role in the evangelization efforts among the indigenous populations. The site served as a central hub for the Dominican missionaries who were active in the region, particularly among the Zoque people. Over the centuries, the convent endured numerous changes and challenges, including substantial damage during the 18th, 19th, and 20th centuries due to various conflicts and natural disasters (Asociacion Nacional de Ciudades Mexicanas del Patrimonio Mundial A.C., n.d.) (Lopez Ruiz, 2009).

Architecturally, the Ex-Convent of Santo Domingo de Guzmán is a masterpiece of colonial design. The building features a Renaissance style with stone masonry construction. Its impressive façade, which dates to the 18th century, showcases a rich array of ornamental motifs crafted from stucco over stone. These decorations include intricate carvings, niches with statues, and the emblem of the Dominican Order, all of which highlight the blend of indigenous and European artistic influences. The convent complex originally covered an area of 24 lots but expanded to over 40,000 square meters through subsequent acquisitions (World Monuments Fund, n.d.).

The convent was a significant centre for the Dominican Order's activities in Chiapas. From 1608 until 1857, it functioned as a religious institution, housing friars who were involved in missionary work. During Mexico's War of Independence and the subsequent Reform War, the convent was occupied by various military forces, leading to its closure as a religious site. In the late 19th century, the site was used as a military barracks, which resulted in the destruction and looting of many of its rich altarpieces and other religious artifacts. Despite these setbacks, the site was stabilized and partially restored in the 1950s, allowing it to reopen for religious and cultural purposes (Asociacion Nacional de Ciudades Mexicanas del Patrimonio Mundial A.C., n.d.) (Lopez Ruiz, 2009).

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In recent decades, efforts have been made to restore and preserve the Ex-Convent of Santo Domingo de Guzmán. The World Monuments Fund and other local organizations have played crucial roles in these restoration projects. These efforts included the repair of the exterior and interior structures, the installation of a new roof, and improvements to the surrounding urban landscape to enhance access and promote heritage tourism. Today, the convent serves not only as a place of worship but also as a community and cultural centre. It houses a museum, a library, a crafts centre, a hotel, and a restaurant, making it a vibrant part of the local community and an important cultural landmark (World Monuments Fund, n.d.) (Lopez Ruiz, 2009).

For visitors, the Ex-Convent of Santo Domingo de Guzmán offers a glimpse into the rich cultural and religious history of Chiapas. The convent's museum displays a collection of artifacts that reflect the region's history from pre-Hispanic times through the colonial period and into the modern era. The complex is open to the public daily, providing a space where locals and tourists alike can explore its historical and architectural treasures. The detailed Baroque altarpieces, the beautiful courtyards, and the serene gardens all contribute to a profound sense of the site's historical significance and cultural heritage (Asociacion Nacional de Ciudades Mexicanas del Patrimonio Mundial A.C., n.d.).

The Ex-Convent of Santo Domingo de Guzmán in Chiapas is more than just an architectural marvel; it is a testament to the enduring legacy of the Dominican Order's influence in Mexico. Its history of resilience and restoration mirrors the broader story of Chiapas itself—a region marked by its rich cultural heritage and the ongoing efforts to preserve and celebrate it. As both a historical site and a living cultural centre, the ex-convent continues to play a vital role in the community, offering insights into the past while serving contemporary needs.

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Section 4.7 Ex-convent and temple of Santo Domingo de Guzman, Chiapas

4.7.2 Management approach & partnerships

The complex has been property of the Mexican nation since 1853 and today is safeguarded by the National Institute for Anthropology and History (INAH). It is currently used as museums, a church, a library, and workshops. The governmental organization called Statal Council for the Culture and Arts of Chiapas (CONECULTA) and INAH are managing the Museum “Altos de Chiapas” which holds a permanent exposition of the regional culture. The non-profit organization Fomento Cultural Citibanamex is managing the Textiles of the Mayan World Museum. The Catholic Church manages the temple. Other smaller organizations are involved in the provision of services but not in the management or administration.

The most recent restoration (concluded in 2023) was financed by Fomento Cultural Citibanamex and supervised by the National Institute for Anthropology and History, after the earthquake of 2017 with an epicentre in the neighbouring state of Puebla. This intervention included the superficial cleaning of the temple’s façade, the restoration of walls made of adobe, and the rehabilitation of the roof system which included a heavy intervention of the wooden structure which was affected by xylophagous insects.

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Table 8. Ex-convent and temple of Santo Domingo de Guzman, Chiapas

With information from (Asociacion Nacional de Ciudades Mexicanas del Patrimonio Mundial A.C., n.d.) (Lopez Ruiz, 2009) (World Monuments Fund, n.d.)

Name of the project	Ex-Convent and temple of Santo Domingo de Guzman		
Location	San Cristóbal de las Casas, Chiapas, Mexico.		
Date of construction start	1548 – Construction of the first building 2009 – Restoration works		
Date of inauguration	2012		
Type of project	Public – Private – People Partnership		
Area of the project (m²)	No data		
Estimated investment	No data		
Current Stage	Operation		
Description	<p>Founded in 1546, the church and convent of Santo Domingo de Guzman in San Cristobal de las Casas was one of the first homes of the Dominican order in the state of Chiapas. The complex originally hosted a temple, a school, an infirmary, kitchen, and other spaces. Originally property of the Dominican Order, the complex was transferred to the national property in 1853, and throughout its history it has been used as military headquarters and served as a prison during the first half of the XX century. Today it is guarded by the INAH and managed by a group of governmental and non-governmental organizations.</p> <p>There have been many partnerships between public-private-people to restore, conserve and manage the complex, and many of these have not been properly documented. In the early 2000, Fomento Cultural Citibanamex, Fomento Social Citibanamex, the Board of Trustees “Colección Pellizzi” A.C. and the “Sociedad de Tejedoras de San Jolobil S.C.” united in an effort to support the restoration of the temple and ex-convent, while obtaining a place to establish the Textiles of the Mayan World Museum which is the subject of this study.</p>		
Project structure including governance			
Financing	No data		
Partners	PA	Private entities	Third Sector entities
	INAH; State Government of Chiapas, Mexico		Fomento Cultural Citibanamex, A.C.; Fomento Social Citibanamex, A.C.; Sociedad de tejedoras de San Jolobil
	Roles & responsibilities		
	Owners; partial financing of the restoration; partial administration; experts for the restoration.		Partial financing; partial administration.
Project Summary	<p>The project: the complex has been intervened in several moments over the last 50 years. In 1975, the first restoration of the façade of the church was executed along with the restoration of the baroque altarpiece.</p> <p>Another intervention happened between the years of 2009 and 2012, which included the complete restoration and modernization of the ex-convent to be able to host the Textiles of the Mayan World Museum.</p> <p>Challenges: There were not many challenges related to the ownership or management of the complex, but there were many in relation to the restoration works. Heavy looting of the ornamental pieces occurring during the occupation by the military, and the selling of other ornamental artefacts to fund the restorations in the XIX century made difficult to precisely restore the complex to its original state.</p> <p>Why P4? The size of the complex, number of ornaments and the importance to the New Hispanic Baroque artistic movement required the restoration works</p>		

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Section 4.7 Ex-convent and temple of Santo Domingo de Guzman, Chiapas

	<p>many resources which the federal government could not provide by itself. The involvement of non-profit organizations, dedicated to the preservation of the Mexican culture such as Citibanamex, allowed for the distribution of responsibilities (financing, experts, and technical and historical knowledge) among governmental and non-governmental institutions.</p>
	<p>Project Outcomes It currently holds several uses including the temple of Santo Domingo (administered by the catholic church), museums including the “Altos de Chiapas” Museum and the Textiles of the Mayan World Museum. It is one of the most important churches of the architectural style New Hispanic Baroque, for the size, richness of ornaments and the extension of its influence during the religious colonization executed by the Dominican order in the XVI and XVII centuries. One of the most important sources of income of the municipality is the tourism sector, and this complex is one (if not the first) of the main touristic attractions of the community.</p>

4.8 Ex-convent of Santo Domingo, Oaxaca, Mexico



*Figure 40. Facade of the temple of Santo Domingo de Guzman,
Oaxaca, Mexico
(Victoria, 2020)*

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Section 4.8 Ex-convent of Santo Domingo, Oaxaca, Mexico

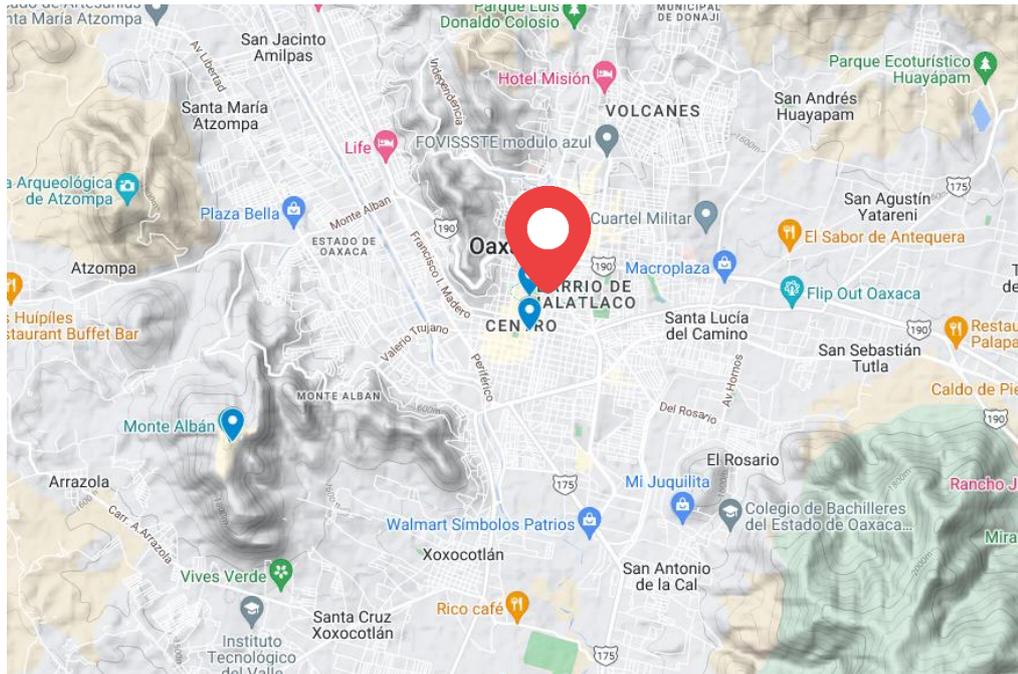


Figure 41. Map of the location of the project

Elaboration of the author. Map data 2024 Google, INEGI

4.8.1 Description

The Ex-convent of Santo Domingo, officially known as the Templo de Santo Domingo de Guzmán, is a historic and cultural landmark located in the city of Oaxaca, Mexico. The construction of the Ex-convent of Santo Domingo began in 1572 and continued over several decades, finally being completed in the early 17th century. The convent was established by the Dominican Order, which played a significant role in the religious and cultural life of colonial Oaxaca. The building is a stunning example of Baroque architecture, featuring elaborate stucco work, gilded altars, and a richly decorated interior. The church and convent complex showcase the Dominican influence and the wealth of the Spanish colonial period (INAH, n.d.).

The church of Santo Domingo is renowned for its intricately carved wooden altarpieces and its ceiling, which is adorned with detailed paintings and gold leaf. The convent's cloister is equally impressive, with its large, arched corridors and tranquil courtyards, which served as a place of residence and reflection for the Dominican friars. The Chapel of the Rosary within the church is particularly famous for its opulent decoration and is considered one of the most beautiful examples of Baroque art in Mexico. Additionally, the Ex-convent features beautiful

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gardens that were originally used to grow medicinal plants and herbs for the friars (Oaxaca Mio, n.d.).

Today, the former convent buildings house the Museo de las Culturas de Oaxaca, which contains an extensive collection of artifacts that span Oaxaca's history from pre-Hispanic times to the present day. The museum includes Mixtec and Zapotec treasures, such as jewellery and artifacts discovered in the nearby ruins of Monte Albán. The Ex-convent is also used for various cultural events, including art exhibitions, concerts, and lectures, making it a vibrant cultural hub in Oaxaca (INAH, n.d.).

The Ex-convent of Santo Domingo is not only a religious site but also a testament to Oaxaca's rich cultural and historical heritage. It is considered one of the most important and well-preserved colonial-era structures in Mexico. As a major tourist attraction in Oaxaca, it draws visitors from around the world who come to admire its architectural beauty and learn about the region's history. The Ex-convent of Santo Domingo remains a symbol of Oaxaca's past and present, offering a glimpse into the religious, cultural, and artistic legacy of the region. (Oaxaca Mio, n.d.)

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Section 4.8 Ex-convent of Santo Domingo, Oaxaca, Mexico

4.8.2 Management approach & partnerships

is managed primarily by INAH, in collaboration with the Government of the State of Oaxaca. INAH is responsible for the preservation, research, and promotion of the cultural and historical aspects of the site. This includes the maintenance of the building, its exhibitions, and the extensive collections housed within, such as pre-Hispanic artifacts, colonial art, and ethnographic displays. The management also involves curating temporary exhibitions and organizing cultural events to engage both locals and visitors.

The center also collaborates with other cultural institutions, including local universities and museums, to support educational programs, research projects, and cultural outreach initiatives. The goal of these collaborations is to ensure that the center not only preserves Oaxaca's rich cultural heritage but also serves as a dynamic space for education and cultural exchange.

The Jardín Etnobotánico de Oaxaca, which is adjacent to the Centro Cultural Santo Domingo, is also a key part of the cultural complex and is managed in partnership with the garden's dedicated administration, as mentioned earlier. Together, these institutions work to preserve and promote the unique cultural and natural heritage of Oaxaca.

The main partners are:

- **INAH** as the primary institution overseeing the Centro Cultural Santo Domingo, which includes maintaining the site's historical integrity, curating exhibitions, and organizing cultural events
- **Statal Government of Oaxaca**, providing support for the management and promotion of the cultural center, which includes funding, coordinating state-level cultural initiatives, and ensuring that the center aligns with broader regional cultural policies
- **Instituto de Artes Graphics de Oaxaca (IAGO)**, plays a key role in cultural programming and educational initiatives at the center, it contributes to exhibitions, workshops, and other cultural activities that highlight Oaxacan art and traditions
- **Fundación Alfredo Harp Helu Oaxaca (FAHHO)** participates in the funding of specific programs, conservation projects and exhibitions, besides in the maintenance of the site.

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Table 9. General description of the project: Ex-Monastery and Temple of Santo Domingo de Guzmán

With information from (Mateos & Abelleira, 1998)

Name of the project	Ex-convent and Temple of Santo Domingo de Guzmán		
Location	Oaxaca, Oaxaca, Mexico		
Date of construction start	1572 – Construction of the first building 1994 – Restoration works		
Date of inauguration	July 24, 1998		
Type of project	Public – Private – People Partnership		
Area of the project (m²)	42.768,00 m ²		
Estimated investment	More than \$117 million (MXN)		
Current Stage	Operation		
Description	Built from 1575 through 1666, it was the host of the Dominical Order's Monastery and a Catholic temple. The complex was used to <i>educate</i> and for the evangelization of the regions of the Mixteca and Zapoteca. In the XIX century, specifically after 1812, it hosted troops of various conflict factions who triggered the decay of the complex. From 1872 the site was occupied by the federal forces, in which the soldiers looted paintings, furniture and religious ornaments made of silver and gold. The dominical order returned in 1939, and in 1962 the recovery of the site was started; but it was not until 1994 that the federal forces were removed, and the complex was given to the state government to manage.		
Project structure including governance	Oaxaca State government opened a public call for proposals for the use of the Santo Domingo complex. The held sessions with painters and civilians to propose the rescue project in which the Board for the Defence and Conservation of the Cultural and Natural Heritage of Oaxaca (ProOax, Acronym in Spanish) was present. After these meetings it was determined that the complex would be the space for the New Museum of the Cultures of Oaxaca, the Ethno-botanical Garden, the historical library of Francisco Burgoa (which had books dating to the XVII and XVIII centuries). The reconstruction lasted 4 years and was inaugurated in 1998, INAH put forward their technical knowledge on the historical buildings. The operation of the museums and library would be managed by the state government, through the secretary of tourism, while the temple and Cloister would be managed by the Dominical Order of the Catholic Church.		
Financing	A trust fund was instituted which was built with the contribution of the Banamex Social Fund, federal and state government, and ProOax.		
Partners	PA	Private entities	Third Sector entities
	State and federal PAs, INAH, National council for the culture and arts (CNCA, acronym in Spanish)	Banamex, Catholic Church	IAGO, FAHHO, ProOax, Painters, and Dominical Order.
Partners	Roles & responsibilities		
	Owners, Financing, grantor of the fund, technical knowledge, partial space administrator, ordinary and extraordinary maintenance.	Trustee of the fund	Financing, partial space administrator, designers, use determination.
Project Summary	<p>The project: the ex-monastery and temple of Santo Domingo de Guzman were rescued and is currently the host of the New Museum of Cultures of Oaxaca, the ethnobotanical garden, and home of the Dominical order of the Catholic Church.</p> <p>Challenges: The project was the center of controversy because there was an unofficial project to convert it into a hotel, parking lot, golf club and a glass pyramid similar to the one at the Louvre Museum in Paris, France. Through the</p>		

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Section 4.8 Ex-convent of Santo Domingo, Oaxaca, Mexico

efforts of the civil society and the third-sector institution ProOax, it was decided it would be converted into a center of culture.

Why P4? The civil society of Oaxaca has a very strong sense of ownership of the cultural heritage and does not approve the lending of the buildings for-profit purposes, since they believe this is contamination of their culture. México has many programs to fund the rescue of the built cultural heritage with a national institute that provides historical and technical knowledge, but struggles in the destination, operation, and maintenance. For this, a specialized trust fund and board were instituted to oversee the site, while meetings with the civil society and entities of the third sector were held to determine the use.

Project Outcomes

The whole complex was rescued, and currently hosts Museums, a library, an ethnobotanical garden and is home of the Dominical order.



Figure 42. Children visit the Ethnobotanical Garden, with the cultural center of Santo Domingo in the Background.

(Jardín etnobotánico de Oaxaca)

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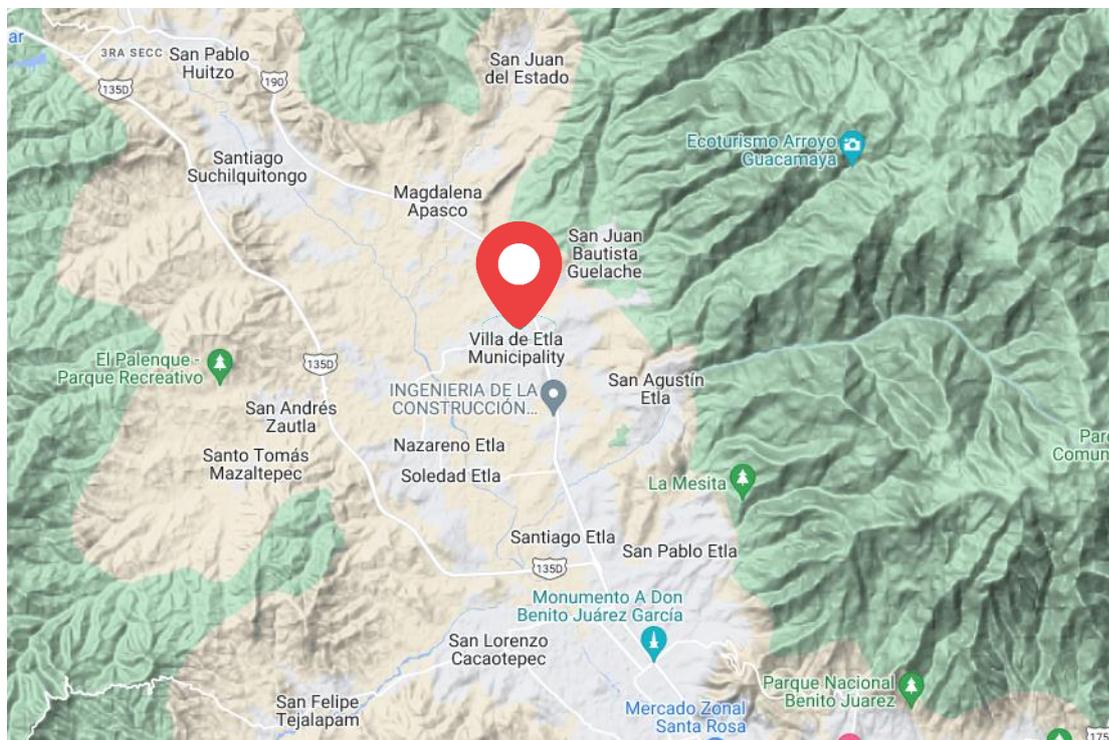
Figure 43. Cloister at Ex monastery of Santo Domingo de Guzmán, now the Museum of the Cultures of Oaxaca

(Paco Link, 1998)

4.9 Templo de San Pedro y San Pablo, Etna



Figure 44. Church of San Pedro and San Pablo, Villa de Etna (Oaxaca Mio, n.d.)



*Figure 45. Map of the location of the project
Elaboration of the author. Map data 2024 Google, INEGI*

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Section 4.9 Templo de San Pedro y San Pablo, Etna

4.9.1 Description

The complex of former convent and church of San Pedro and San Pablo is part of the identity of the community of Etna but it is in constant deterioration and the community has the will but no resources to maintain them or use them to increase the wellbeing of the community. This is the essence of a comment by Arch. Aurelio Reyes, a strong promoter of the cultural heritage and Historian of Etna and other communities in Oaxaca (interview conducted in March 2024).

The construction of the Temple of San Pedro and San Pablo began around 1520, with significant contributions from prominent figures such as Fathers José Calderón and Alfonso Espinoza. The complex was completed in 1636, which is commemorated by a plaque on the west side of the cloister (Oaxaca Mio, n.d.).

The temple is notable for its use of green Lime-stone, a characteristic building material in the region. The complex includes the main church, a convent, and an atrium. The facade of the temple features two levels with a main doorway framed by smooth pilasters and a semicircular arch, topped by a pediment with a clock in the tympanum. The interior comprises a single nave with a continuous barrel vault, and the presbytery houses a gilded altar piece known as the Señor de las Peñas (Oaxaca Mio, n.d.).

San Pedro and San Pablo are revered as the patron saints of Villa de Etna, and their feast day on June 29 is marked by significant local celebrations. These festivities include floral parades with women dressed in traditional Oaxacan attire, carrying large baskets of flowers, and accompanied by local bands. The temple serves as the focal point for these religious and cultural events, reflecting its ongoing importance to the community (Oaxaca Mio, n.d.).

4.9.2 Management approach & partnerships

The controversy surrounding the Temple of San Pedro and San Pablo in ETLA, Oaxaca, is rooted in its complex historical and cultural significance, as well as conflicts over its preservation and use. This 16th-century Dominican convent complex, constructed mainly from green Limestone, holds great historical and architectural value. The site, which includes a church, convent, and an atrium, has been at the center of local and regional cultural activities, especially during religious festivities like the feast of San Pedro and San Pablo on June 29 (Gomez, 2011) (Oaxaca Mio, n.d.) (Arch. Reyes, 2024).

One major aspect of the controversy involves the site's restoration and maintenance. The historic structure requires significant upkeep, and there have been disputes over how the restoration should be managed and funded. The balance between maintaining the site's historical integrity and adapting it for modern use has been a point of contention. Local authorities and cultural groups have sometimes clashed over decisions related to the restoration processes, with some advocating for a more conservative approach to preserve the original features, while others push for updates that can accommodate contemporary cultural activities (Oaxaca Mio, n.d.) (Arch. Reyes, 2024).

Additionally, the use of the former convent as a municipal gallery and cultural center has sparked debate. While some community members see this as a positive development that breathes new life into the historical site and makes it more accessible to the public, others argue that it can detract from the site's religious and historical significance. This dual use of the space reflects broader tensions between preserving cultural heritage and promoting community engagement through modern uses of historic sites (Oaxaca Mio, n.d.) (Arch. Reyes, 2024).

The community's ongoing efforts to celebrate traditional events, such as the Guelaguetza and other local festivities, often center around this site, further highlighting its importance and the need for careful management to respect both its historical and contemporary roles in the community (Oaxaca Mio, n.d.).

These issues underscore the challenges faced in balancing heritage conservation with the needs and desires of living communities that continue to interact with these historical spaces. The controversies at the Temple of San Pedro and San Pablo exemplify the broader debates on

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Section 4.9 Templo de San Pedro y San Pablo, Etna

how to best preserve historical sites while allowing them to remain active parts of community life (Arch. Reyes, 2024).

Part of the former convent has been repurposed as a municipal gallery and cultural center. This adaptation has been welcomed by some as a way to revitalize the site and make it more accessible to the public, while others feel it detracts from the religious and historical significance of the complex. This dual use highlights the challenges of maintaining the site's cultural heritage while integrating it into the community's daily life (Oaxaca Mio, n.d.) (Arch. Reyes, 2024)

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Table 10. Summary Templo de San Pedro y San Pablo, Etna

With information from (Gomez, 2011) (Arch. Reyes, 2024)

Name of the project	Templo de San Pedro y San Pablo, Etna		
Location	Villa de Etna, Oaxaca, Mexico		
Date of construction start	1963 (Oaxaca Mio, n.d.)		
Date of inauguration	1963 (Oaxaca Mio, n.d.)		
Type of project	Public – Private – People Partnership		
Area of the project (m²)	6,000		
Estimated investment	Information regarding the exact amount of money invested into the Temple of San Pedro and San Pablo project and the specific sources of these funds is not readily available in detailed public records.		
Current Stage	Management – Continuous restoration		
Project structure including governance	The restoration and ongoing management involve various stakeholders, including local government, heritage conservation groups, and community organizations such as the Colectivo Etecos Creando con Causa ETC. This collective effort ensures that the site is preserved as a vital part of the region's cultural heritage (Oaxaca Mio, n.d.) (La Tinta, 2021)		
Financing	Financial investment into the restoration project has primarily come from public and private donations, as well as government support. Events and initiatives aimed at raising funds for the conservation efforts have been a crucial part of the project. However, specific amounts of money invested are not readily available. (La Tinta, 2021)		
Partners	Public entities	Private entities	Third sector entities
	INAH	Catholic Church	ETECOS collective, Creando con Causa ETC. FAHHO. Community council. UABJO
	<i>Roles & responsibilities</i>		
	Owner, specialized and technical labor	Tenant, maintenance	Financing, long-term maintenance
Project summary	<p>The project: The project has several stakeholders which include INAH, the community council and other third-sector entities. The community council and religious community it hesitant to allow for the complete management of the site (including handling the space use) in exchange for the maintenance of the site; this is because institutions as FAHHO were taking too much control over when this community could use the Temple. Several attempts have been made to make partnerships with external institutions to the community but the only ones that have an active participation are INAH and small, third-sector institutions.</p> <p>Challenges: As many other sites in the state, it is located in a rural community that auto-governs because of their right of Usos y Costumbres the Constitution grants them. Other challenges include the location being in a highly seismic zone and frequent acid rain, both of which make the maintenance having to occur with a high frequency.</p> <p>Why P4? Because of the auto-governing aspect of the community, and a strong sense of appropriation of the building by the community, it is intrinsically a collaboration between third sector organizations and the public administration</p>		
	<p>Project outcomes. As of today, the Temple receives funding from the federation through public programs which allows for the frequent (but still not enough) maintenance of the site. A strong community council has been advocating for solutions that keep the end-users with some amount of control through the management of the site</p>		

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Section 4.9 Templo de San Pedro y San Pablo, Etna

4.10 New Aquarium of Mazatlán Sinaloa



Figure 46. Rendering of the project for the new Aquarium and Investigation Centre in Mazatlán

(Tatiana-Bilbao-Studio)

This case study was selected because it is a project which belongs to the cultural sphere (not heritage) and it has successfully entered into management agreements with private partners. Furthermore, it illustrates how there is a growing need for innovative strategies to manage buildings in the cultural tourism industry, which calls for different institutions in the public realm such as INAH and the Tourism Ministry (SECTUR).

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Section 4.10 New Aquarium of Mazatlán Sinaloa

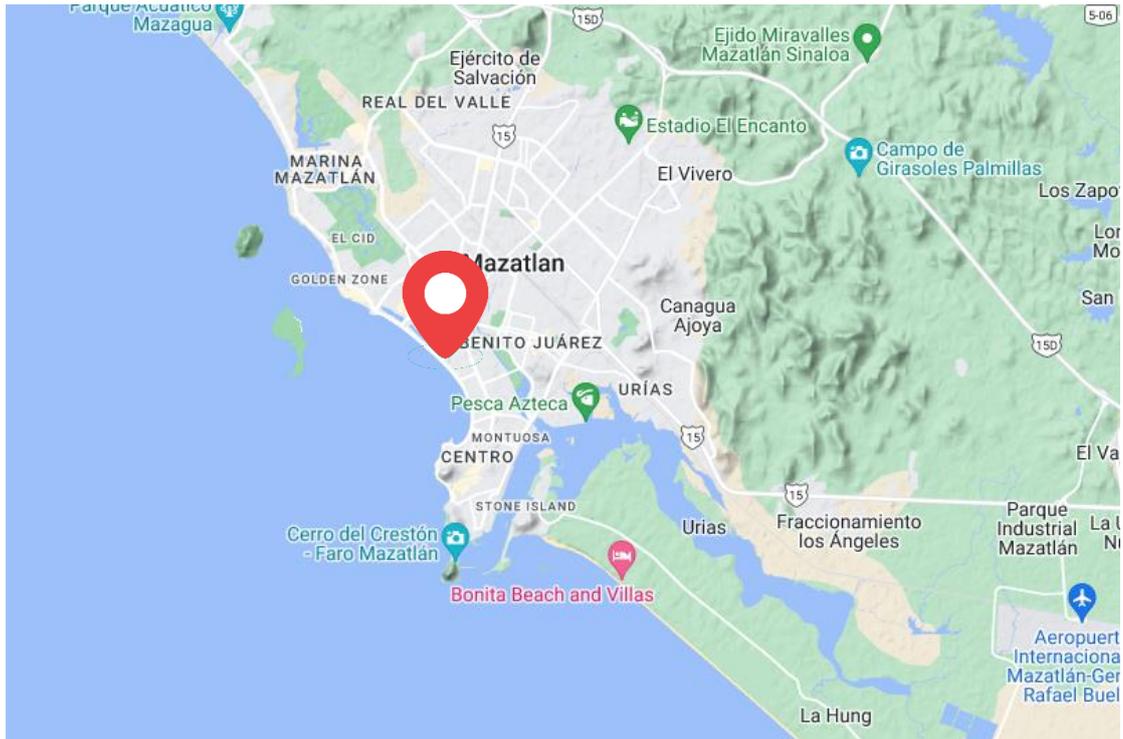


Figure 47. Map of the location of the project
Elaboration of the author. Map data 2024 Google, INEGI

4.10.1 Description

Mazatlán, known for its beautiful beaches and vibrant cultural scene, has recently added another jewel to its crown: the Gran Acuario Mazatlán, also known as the Sea of Cortez Aquarium. This state-of-the-art facility is not only the largest aquarium in Mexico but also a landmark attraction in Latin America. The aquarium opened its doors to the public in the spring of 2023 and has quickly become a must-visit destination for both locals and tourists. This detailed overview explores the aquarium's features, architectural significance, and its impact on tourism and conservation efforts.

The Gran Acuario Mazatlán is the result of a P3, a pioneering project in Mexico's tourism sector. The total investment for this grand project was approximately 1.8 billion pesos (around 99.3 million USD), with significant contributions from the Kingu Mexicana company, the national infrastructure fund (Fonadin), and other financial institutions such as FONATUR, Bancomext, and Banobras. Ernesto Coppel Kelly, the founder and president of Pueblo Bonito Golf & Spa Resorts, played a

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pivotal role in the aquarium's development, reflecting his commitment to enhancing Mazatlán's tourist appeal (Pueblo Bonito , n.d.).

The architectural design of the Gran Acuario Mazatlán is a marvel in itself. Designed by renowned Mexican architect Tatiana Bilbao, the aquarium spans a total built area of 186,000 square feet with walls reaching seventy-four feet in height. The structure is characterized by its strikingly isolated presence and severe, bunker-like massing. Despite this, it features elegant, vertically staggered slabs of concrete and a distinctive mauve shading that tempers its rectilinearity. The design incorporates a ceremonial staircase leading to a rooftop garden, from where visitors descend into the aquarium, simulating a submersion into an underwater world. This imaginative approach reflects Bilbao's vision of blending the past and future, tradition and innovation (Anaya, 2024) (Coates, 2022).

The Gran Acuario Mazatlán boasts a variety of exhibits and interactive features designed to educate and entertain visitors. It includes:

- **Marine and Coastal Exhibits:** Featuring ecosystems such as mangroves, tide pools, and a replica coral reef. Notably, the aquarium includes a massive shark tank and touch tanks where visitors can interact with rays and starfish.
- **Sea Turtle Refuge and Rehabilitation:** A dedicated space for the care and rehabilitation of injured sea turtles.
- **Terrariums:** Housing snakes, lizards, and toads, these exhibits highlight the diversity of coastal and marine life.
- **Educational Displays:** Interactive displays explaining the physics of waves and the adaptations of marine species to their environments (Egelhoff, 2023).

One of the standout features is an Instagram-ready artificial wave that cascades from the ceiling, creating a dynamic and visually captivating exhibit. Additionally, the rooftop garden offers a panoramic view of Mazatlán's Laguna del Camarón and the ocean, further enhancing the visitor experience (Egelhoff, 2023).

The Gran Acuario Mazatlán incorporates advanced technology and sustainable practices to ensure the well-being of its marine inhabitants and the environment. The Life Support System (LSS) designed by MAT Filtration Technologies includes state-of-the-art equipment such as protein skimmers, carbon filters, UV filters, and heat exchangers. These

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Section 4.10 New Aquarium of Mazatlán Sinaloa

systems optimize water quality and circulation, providing a healthy habitat for the marine life housed within the aquarium. The use of automated systems for effortless operation ensures efficiency and reduces maintenance costs, highlighting the aquarium's commitment to sustainability (Coates, 2022).

The Gran Acuario Mazatlán is expected to significantly boost local tourism, attracting an estimated 900,000 visitors in its first year. This influx of tourists is anticipated to have a positive economic impact on the region, benefiting local businesses and hospitality services. The aquarium also plays a vital role in marine conservation, educating the public about the importance of preserving marine ecosystems and supporting research initiatives focused on the Sea of Cortez (Pueblo Bonito , n.d.) (Mazatlan Visit, 2023).

Visitors to the Gran Acuario Mazatlán can enjoy a comprehensive and engaging experience. The facility is open daily from 10:00 AM to 6:00 PM, offering ample time for exploration. The entrance fees are included in the all-inclusive plans of certain local resorts, making it an accessible attraction for many tourists. Inside, the aquarium features knowledgeable guides, many of whom are trained biologists, to enhance the educational aspect of the visit. The aquarium's layout and design ensure a seamless flow between exhibits, providing a captivating journey through the marine world (Mazatlan Visit, 2023) (Pueblo Bonito , n.d.).

4.10.2 Management strategies & partnerships

The project is a public-private partnership (PPP), the first of its kind in Mexico's tourism sector. Several institutions are involved in its development, including the Sinaloa state government, the Municipality of Mazatlán, and various private entities. The private sector's contribution is led by the company Kingu Mexicana, owned by Ernesto Coppel Kelly, a prominent figure in Mexico's tourism industry. Additional funding and support came from national institutions such as Fonadin (National Infrastructure Fund), Fonatur (National Fund for Tourism Development), Bancomext (National Bank of Foreign Trade), Banobras (National Works and Public Services Bank), and BanCoppel. (Nader Hayaux & Goebel, 2019) (The Mazatlan Post, 2021)

The management strategy of the aquarium is designed to ensure its sustainability and long-term success. It is structured to be financially self-sufficient, relying on revenue generated from visitor fees to cover its operational costs. The private developer is responsible for the full spectrum of operations, including the design, construction, maintenance, and management of the facility over a 30-year contract period. This strategy is intended to minimize risks to the public sector while ensuring high-quality service and maintenance of the aquarium. (SHCP, 2022).

Despite its impressive opening, the Gran Acuario Mazatlán faced several challenges, including delays and higher ticket prices compared to the old Mazatlán Aquarium. However, efforts are underway to incorporate popular exhibits from the old aquarium, such as the sea lion show and penguin exhibit, to address visitor expectations. Additionally, there are plans to enhance the aquarium with more signage, printed maps, and information modules to improve the visitor experience further (Egelhoff, 2023) (Mazatlan Visit, 2023).

The Gran Acuario Mazatlán stands as a testament to modern architectural innovation, marine conservation, and the potential of P3 in enhancing cultural and tourist attractions. Its blend of advanced technology, educational exhibits, and sustainable practices make it a unique and valuable addition to Mazatlán's tourist landscape. As it continues to evolve, the aquarium promises to be a beacon of marine education and conservation, drawing visitors from around the world to explore the wonders of the Sea of Cortez.

Chapter 4 Case Studies
Section 4.10 New Aquarium of Mazatlán Sinaloa

Table 11. New Aquarium of Mazatlan Sinaloa and research center

With information from (Anaya, 2024) (Coates, 2022) (Egelhoff, 2023)

Name of the project	New aquarium of Mazatlán Sinaloa		
Location	Mazatlán, Sinaloa		
Date of construction start	January 2019 (SHCP, 2022)		
Date of inauguration	October 2022		
Type of project	Public – Private Partnership (SHCP, 2022)		
Area of the project (m²)	12, 384 m ² (SHCP, 2022)		
Estimated investment	1,397 million (MXN) (SHCP, 2022)		
Current Stage	Operation		
Description	First project of P3, in the tourism sector in Mexico (de la Rosa, 2021). It is a project to develop a new building for the aquarium, leaving the old building to research and investigation, located in the so-called Central Mazatlán Park. the aquarium will have approximately 4 million Liters and is intended to operate with the highest international standards of animal care, along with increasing the visiting experience, develop the recreation and education systems.		
Project structure including governance	The construction of the project is expected to last 2 years with 28 years of operation and maintenance, a total of 30 years of conjoint management between the public and private sector. It is expected to increase the consumption of touristic services in the adjacent community, increase the scientific and investigation activities for the preservation and conservation of the flora and fauna of the aquatic ecosystems in the region, while promoting the education and culture of preservation of the local natural resources within the existing local population.		
Financing			
Partners	PA	Private entities	Third Sector entities
	Fondo nacional de infraestructura (FONADIN), Fondo nacional de fomento al turismo (FONATUR)	Kingu Mexicana, Abequ, Ocean Wise Conservation Association, Constructora Makro, Operadora Audax	
	Roles & responsibilities		
	40% of the financing and (limited) owners of the property.	60% of the financing. Design of the museum, construction, operation, maintenance and preservation for 30 years	
Project Summary	<p>The project: the project is expected to serve approximately 170,000 subscribers to the service, while benefiting the core public services in the following ways: incremental services of 3rd level of HRM, incremental services in urgency care, conceptual and technologically vanguard building, orientation to patients, professionals, new technologies, etc.</p> <p>Why P3? According to the local strategies to deliver public services, P3 are an alternative way to finance expensive projects, while transferring risks to the private sector and benefiting from their experience in aspects which are difficult for the PA to manage. It allows to increase the quality of the public services and maintain them for a certain number of years, reduce the tardiness in construction and the over costs associated with it. Because of its size and characteristics, the PA believes it is attractive both to private initiatives and financing institutions</p> <p>Project Outcomes: It became the largest sustainable aquarium in Latino America, hosting 250 species.</p>		



Figure 48. Person Attending the International Forum for PPPs in Culture

(Suárez Hernández)



*Figure 49. Sketch of indigenous people taking decisions.
Elaboration of the author*

Chapter 5

5 Conclusions

The comprehensive analysis of the management of cultural heritage sites in Mexico, with a particular focus on Public-Private-People Partnerships (P4), reveals several key insights and practical recommendations for enhancing the sustainable management of these invaluable assets. This report examined various case studies, legal frameworks, and theoretical approaches to understand the complexities and opportunities in the management of cultural heritage in Mexico.

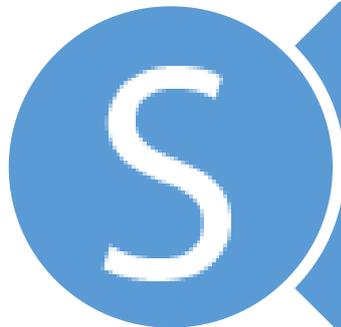
Cultural heritage management in Mexico involves intricate interactions between public, private, and community stakeholders. The Public-Private-People Partnerships (P4) model emerges as a robust strategy to address the multifaceted challenges of managing cultural heritage

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sustainably. This model emphasizes the inclusion of end-users in the decision-making process, ensuring that projects not only address economic and environmental factors but also social sustainability.

The P4 approach builds on the principles of deliberative democratic theory, which advocates for the active participation of communities in planning and managing public services. This inclusion fosters a sense of ownership and responsibility among community members, which is crucial for the long-term success of heritage management projects (Vandesande, Van Balen, Della Torre, & Cardoso, 2018) (Della Torre, 2014).

5.1 SWOT analysis: heritage partnerships in Mexico



Strengths

- Rich Cultural Heritage
- Public Private Sector Involvement
- Legal Framework
- Community Engagement
- International Support



Weaknesses

- Fragmented Management
- Limited Financial Resources
- Legal Ambiguities
- Lack of Updated Data
- Socio-Political Challenges



Opportunities

- Sustainable Tourism
- Technological Advancements
- Educational Programs
- International Collaboration
- Private sector investment



Threats

- Natural disasters
- Urbanization and Development
- Climate Change
- Vandalism and Looting
- Insufficient policy implementation

5.1.1 Strengths:

- **Rich Cultural Heritage:** Mexico has an extensive and diverse cultural heritage that includes pre-Columbian archaeological sites, colonial-era architecture, and a rich tradition of arts and crafts. This provides a strong foundation for cultural tourism and national identity.
- **Public and Private Sector Involvement:** The involvement of both public institutions like INAH and private foundations like Fundación Harp Helú facilitates resource pooling, expertise sharing, and comprehensive conservation efforts.
- **Legal Framework:** There are established laws and regulations, such as the Federal Law on Archaeological Artistic and Historical Monuments and Sites, that provide a framework for heritage conservation.
- **Community Engagement:** Practices like tequio highlight the involvement of local communities in the preservation of their cultural heritage, fostering a sense of ownership and responsibility.
- **International Support:** Organizations like UNESCO and ICCROM provide technical support, funding, and international recognition, which help in the preservation and promotion of Mexico's cultural heritage.

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Section 5.1 SWOT analysis: heritage partnerships in Mexico

5.1.2 Weaknesses:

- **Fragmented Management:** The management of cultural heritage sites can be fragmented, with overlapping responsibilities among various government agencies, leading to inefficiencies and gaps in conservation efforts.
- **Limited Financial Resources:** Despite significant investments from both public and private sectors, the financial resources available are often insufficient to meet the extensive needs for conservation, maintenance, and promotion of heritage sites.
- **Legal Ambiguities:** Ambiguities in laws, especially concerning public-private partnerships (P3) and public-private-people partnerships (P4), can lead to legal challenges and slow down project implementation.
- **Lack of Updated Data:** Incomplete or outdated information about heritage assets hampers effective management and strategic planning.
- **Socio-Political Challenges:** Issues such as land tenure disputes, urban development pressures, and socio-political conflicts can complicate conservation efforts.

5.1.3 Opportunities:

- **Sustainable Tourism:** There is a significant potential to develop sustainable tourism that leverages Mexico's cultural heritage, providing economic benefits while ensuring conservation.
- **Technological Advancements:** The use of modern technology for documentation, conservation, and virtual tourism can enhance the management and accessibility of heritage sites.
- **Educational Programs:** Expanding educational programs about cultural heritage can increase public awareness and engagement, fostering a culture of preservation.
- **International Collaboration:** Strengthening international collaborations can bring in additional expertise, funding, and innovative conservation techniques.
- **Private Sector Investment:** Encouraging more private sector investment through incentives and clearer legal frameworks can help bridge the funding gap and introduce more efficient management practices.

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Section 5.1 SWOT analysis: heritage partnerships in Mexico

5.1.4 Threats:

- **Natural Disasters:** Earthquakes, hurricanes, and other natural disasters pose significant risks to heritage sites, necessitating robust disaster management and resilience strategies.
- **Urbanization and Development:** Rapid urbanization and infrastructure development can threaten heritage sites, leading to their degradation or loss.
- **Climate Change:** Climate change impacts, such as increased frequency of extreme weather events, pose long-term risks to the preservation of cultural heritage.
- **Vandalism and Looting:** Heritage sites are vulnerable to vandalism and looting, which can result in the loss of invaluable cultural artifacts.
- **Insufficient Policy Implementation:** Gaps between policy and practice can hinder effective heritage management, with good policies not always translating into effective actions on the ground.

5.2 Conclusions

5.2.1 What is the current situation and what was found

The case studies examined in this report highlight both successful and challenging examples of cultural heritage management in Mexico:

- **Yagul Archaeological Site and Caves:** This site exemplifies effective collaboration between public authorities and local communities. The management strategy includes conservation efforts and the promotion of sustainable tourism, which has positively impacted the local economy.
- **Mitla Archaeological Site:** The restoration and management of Mitla have benefited from significant investments and community involvement. However, challenges remain in balancing tourism and conservation.
- **Temple of San Pedro and San Pablo, Villa de Etla:** The restoration of this site demonstrates the importance of public and private funding in preserving cultural heritage. Community participation has been crucial in maintaining the site's historical significance.
- **Copalita Archaeological Site:** Managed as an eco-archaeological park, Copalita integrates environmental and cultural conservation. Funding from FONATUR and collaboration with INAH has facilitated the site's development, but faces significant corruption problems due to the lack of enforcement of the contracts by the corresponding authority.
- **Monte Albán:** This site faces significant challenges due to its size and the impact of natural disasters. The management involves multiple stakeholders, including international organizations like the World Monuments Fund and private foundations. The recent earthquake recovery efforts highlight the need for resilient and adaptive management strategies.

Among other things found in this research are the following topics:

- The legal framework for managing cultural heritage in Mexico is complex, involving multiple regulations and stakeholders. Key institutions include the National Institute of Anthropology and History (INAH) and the National Institute for Fine Arts and

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Section 5.2 Conclusions

Literature (INBAL). These organizations play pivotal roles in cataloguing, conserving, and promoting cultural heritage.

However, the lack of specific legislation for P4 projects in the cultural heritage sector poses significant challenges. Current laws primarily regulate Public-Private Partnerships (P3), which do not fully encompass the social aspects addressed by P4. This gap necessitates legal reforms to create a conducive environment for P4 initiatives.

- There is a growing interest in the topic of public - private - people partnerships from the private sector and from educational institutions. This can be observed in the organization of forums and the registration of similar projects on the federal platform of PPPs in Mexico, for example the international forum on Public-private partnerships in culture (Foro internacional Alianzas Público Privado en Cultura) which was held in the university of Tec de Monterrey, in Monterrey, Mexico.
- Rural communities who have cultural heritage in their territory, prefer to engage with private organizations with non-profit objectives rather than for-profit entities because these latter tend to take advantage of the low surveillance of these types of collaborations, often resulting in the private partner not performing parts of their activities or using the site in an inadequate manner.
- Challenges are often regarding the ownership of the property where cultural heritage lies. This is due to the constitutional right of rural communities to auto govern which has been discussed as the 'usos y costumbres' right in previous sections. It includes the designation of the landowners. This is in conflict with the legal provision which states that all pre-Columbian era buildings are owned by the state. For example, the case studies of Yagul and Mitla, are both archaeological sites partially inside a rural communities.
- Because Mexico is a country that has been conquered, there are buildings built on top of significant edifications of the conquered culture, which brings to the table the question of what to be preserved and to what extent should we conserve a site while allowing it to be occupied/used. For example the Roman Catholic church and market in the case study of the Templo de San Pedro y San Pablo, Etla were built upon the foundations of the market built by the pre-Columbian settlers. Another example is the

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Cathedral of México city and some adjacent squares, were discovered to have been constructed above one of the most important ceremonial center of the Mexicas. Both of these are examples of the heritage conservation discussion over what cultural aspects govern over others.

5.2.2 Recommendations and further research

The sustainable management of cultural heritage sites requires a holistic approach that integrates conservation, community engagement, and economic development. Key best practices identified include:

- **Inclusive Decision-Making:** Ensuring that local communities have a voice in the management process is vital. This inclusion fosters a sense of ownership and responsibility, leading to more sustainable outcomes.
- **Strategic Partnerships:** Collaboration between public, private, and community stakeholders can mobilize resources and expertise, enhancing the effectiveness of conservation efforts.
- **Legal and Policy Reforms:** Updating the legal framework to support P4 initiatives can provide a more structured and supportive environment for cultural heritage management.
- **Capacity Building:** Training and educating community members and stakeholders about heritage conservation can build local capacity and ensure the continuity of preservation efforts.
- **Economic Sustainability:** Developing sustainable tourism, bio-tourism, and other revenue-generating activities can provide the necessary financial support for ongoing conservation and management.
- **Developing Comprehensive Strategies:** Governments should define clear public real estate management strategies that outline vision, objectives, and implementation plans.
- **Strengthening Institutional Frameworks:** Clarifying roles and responsibilities and enhancing coordination among government entities is crucial for effective management.
- **Improving Productivity:** Adopting private sector practices such as active demand management and strategic policy for buying, selling, and managing assets can enhance productivity.
- **Enhancing Transparency:** Modernizing and professionalizing asset registries, valuations, and management practices can improve transparency and ensure that the true value of public assets is realized

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Based on the analysis, several recommendations are proposed to enhance the management of cultural heritage in Mexico:

- **Legal Reforms:** Develop and implement specific legislation for P4 projects in the cultural heritage sector, ensuring that the social dimensions of sustainability are addressed.
- **Community Engagement:** Strengthen mechanisms for community participation in the management of heritage sites, ensuring that local voices are heard and valued.
- **Funding Strategies:** Diversify funding sources, including public, private, and community contributions, to ensure the financial sustainability of heritage projects.
- **Capacity Building:** Invest in training and education programs for local communities and stakeholders to build capacity for heritage management.
- **Integrated Management Plans:** Develop comprehensive management plans that integrate conservation, tourism, and community development, ensuring a balanced approach to heritage preservation.
- **Monitoring and Evaluation:** Establish robust monitoring and evaluation frameworks to assess the impact of heritage management projects and inform future strategies.
- **Developing Comprehensive Strategies:** Governments should define clear public real estate management strategies that outline vision, objectives, and implementation plans.
- **Strengthening Institutional Frameworks:** Clarifying roles and responsibilities and enhancing coordination among government entities is crucial for effective management.
- **Improving Productivity:** Adopting private sector practices such as active demand management and strategic policy for buying, selling, and managing assets can enhance productivity.
- **Enhancing Transparency:** Modernizing and professionalizing asset registries, valuations, and management practices can improve transparency and ensure that the true value of public assets is realized.

The management of cultural heritage in Mexico, particularly through Public-Private-People Partnerships, presents a promising approach to achieving sustainable outcomes. By integrating cultural, economic, social, and environmental dimensions, these partnerships can enhance the conservation and promotion of cultural heritage while fostering

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community engagement and economic development. Legal reforms, strategic partnerships, and inclusive decision-making are critical to the success of these initiatives, ensuring that Mexico's rich cultural heritage is preserved for future generations.

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