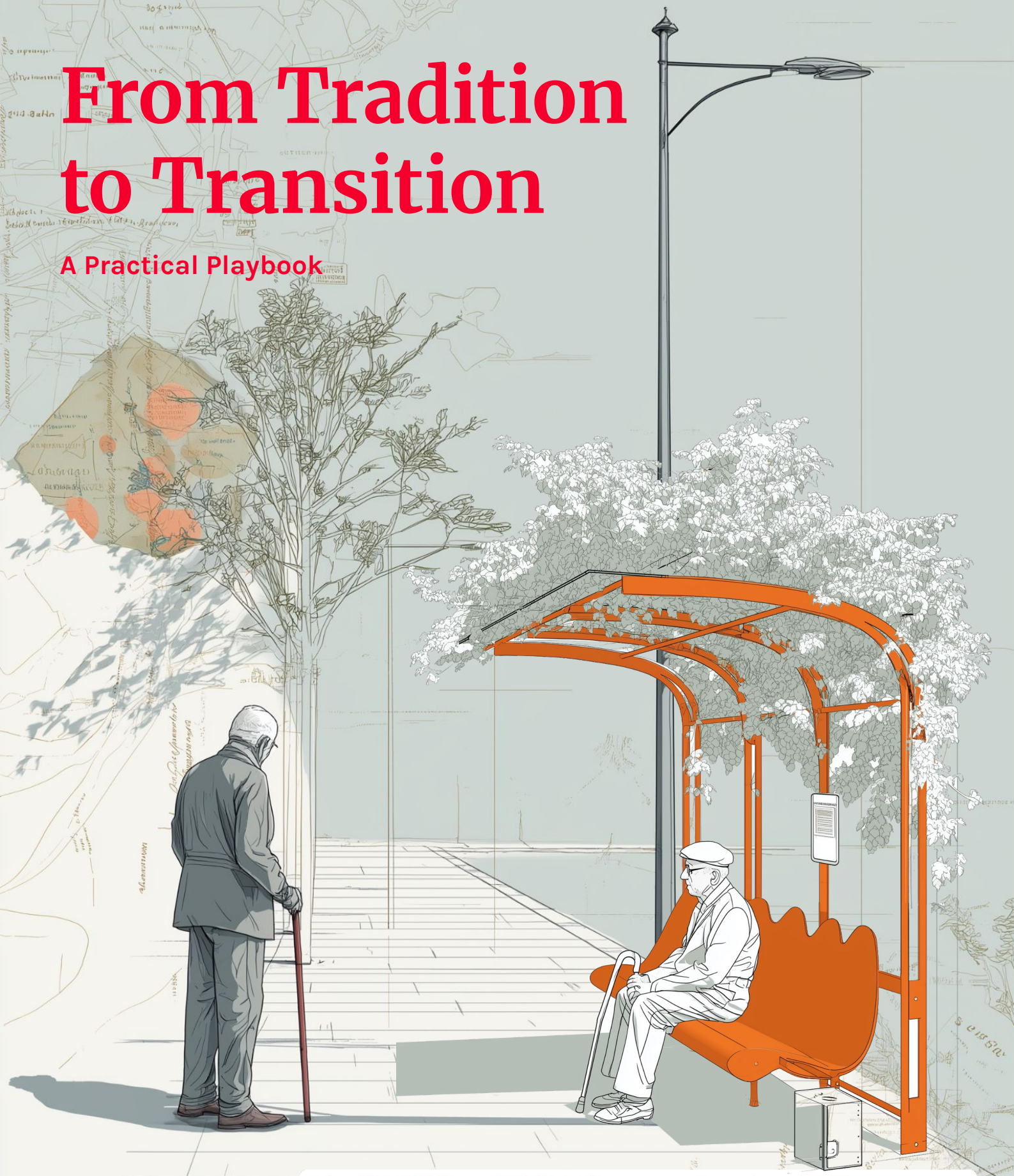
ERASMUS+ PROJECT

Fruitful Synergy

# From Tradition to Transition

## A Practical Playbook



POMKO
DOON ideate.validate.create
CAG Centrum Agrarische Geschiedenis
pti kortrijk west-vlaanderen
pts MECHELEN
Co-funded by the European Union

# Imprint

**Recommended citation:**
Van Cauwenberghe, J., Groenendijk, B., Souza, B., Bisschops, C., Delmotte, J., & Dewitte, D. (2024). Fruitful Synergy: From Tradition to Transition – Engaging European Students in Fruit Biodiversity Conservation through Collaborative Design. POMKO vzw.

**Editors / Partner Organisations**
This publication is produced by the consortium of the Erasmus+ project Fruitful Synergy: Engaging European Students in Fruit Biodiversity Conservation through Designing Collaborative Initiatives: POMKO vzw (BE) – Lead organisation, DOON (NL), CAG – Centrum Agrarische Geschiedenis (BE)PTI Kortrijk (BE), PTS Mechelen (BE),

**Fruitful - Application - KA210VET**
First authors (DOON): Joos Van Cauwenberghe, Berry Groenendijk, Second author (Independent expert): Bruna Souza, Third author (CAG): Chantal Bisschops, Fourth authors (POMKO): Jeroen Delmotte, Dieter Dewitte

**Website**
Project webpage: https://www.pomko.be/fruitful

**License**
This work is licensed under a Creative Commons Attribution-ShareAlike 4.0 International License. To view a copy of this license, visit: http://creativecommons.org/licenses/by-sa/4.0/


**Erasmus+ Disclaimer**

The project “Fruitful Synergy: Engaging European Students in Fruit Biodiversity Conservation through Designing Collaborative Initiatives” (Project code: 2023-2-BE02-KA210-VET-000185043) is co-funded by the Erasmus+ Programme of the European Union.

The views expressed in this publication are those of the authors and project partners and do not necessarily reflect the views of the European Commission. The European Commission is not responsible for any use that may be made of the information contained herein.

(Project approval and code confirmed in official selection letter.

# Table of Contents

# Table of Contents

Chapter 1

# Introduction

Chapter 1

# Introduction

## Why Heritage and Transition?

Many living traditions – from farming techniques to water management practices – carry *embedded wisdom* for today's problems. Intangible cultural heritage (also called "living heritage"), are practices and knowledge passed down and adapted by communities. This includes oral traditions and expressions, performing arts; rituals and festive events, traditional craftsmanship. The international community recognizes as living heritage ***"a mainspring of cultural diversity and a guarantee of sustainable development"***. However, this knowledge is often undervalued or threatened by globalization, urbanization, and climate change.. At the same time, sustainability experts are looking for community-based, place-specific solutions—exactly where heritage can contribute.

## A Playbook for Action

*From Tradition to Transition* is a guide to help communities **connect** their traditions with modern sustainability goals. The process includes four main steps:

1. **Document** a heritage practice,
2. **Assess** its current condition,
3. **Co-create** new ideas to adapt it, and
4. **Implement** and **sustain** those ideas.

This is done with communities, not for them—elders, youth, and local practitioners lead the way, supported by facilitators. For example, elders may demonstrate pruning techniques, while youth create videos to share knowledge.

# Scope of This Playbook

We focus on **intangible cultural heritage**, especially practices related to sustainable living and **agriculture**. Our working case is **fruit heritage** (such as traditional fruit tree cultivation), but the approach can adapt to any living heritage—from crafts to performing arts—as long as there is some community knowledge to build on. Importantly, this playbook assumes you already have or know of a specific heritage practice that is documented or remembered (even if only partially). The method is not about cataloging every tradition instead, it is to help communities explore the "transition potential" of specific practices they care about.

# Origins

This playbook was developed during the **Erasmus+ Fruitful Synergies project (2024–2025)**. It combines fieldwork, participatory workshops, UNESCO's 2003 Convention, and transition design approaches. The method has been tested in practice, and the hope is that it serves as an inspiring example for others.

Ultimately, *From Tradition to Transition* is a playbook for hope and action – showing how looking to the past can spark innovative pathways for the future. As a 2022 international white paper on heritage and climate change noted, there is an urgent need to learn from diverse traditional and local knowledge systems to forge sustainable futures. This guide is one humble attempt to turn that insight into practical steps.

# How to Use This Playbook

The handbook is organized step by step:

| | |
|---|---|
| **Ch. 2–3** | Explain key concept ("Living Heritage" and "Transition Design"). |
| **Ch. 4** | Describes the audience, challenges, and best practices. |
| **Ch. 5** | Outlines the Four-Phase Process (*Scan, Select, Shape, Support*). |
| **Ch. 6** | Provides a worked example and how to integrate into your work. |
| **Ch. 7** | Shows how to keep momentum going. |

Each step in the process is presented **WHAT, WHY, HOW,** and expected **OUTPUTS**, along with facilitation tips. Let's begin by clarifying our key concepts: **living heritage** and **transition design**.

## Disclaimer

This publication is not a scientific work. We are practitioners with a passion for agricultural living heritage and design practices. Through the Erasmus+ Fruitful Synergies project, we received the opportunity to bring these two worlds together to create a practical, accessible and repeatable process for revitalising fruit heritage.

The publication is not intended to be complete, and the proposed steps are not perfect. Instead, it is meant as a starting point for discussion and continuous improvement. We hope that it inspires further development of methods to use living heritage in building a climate-resilient future.

Chapter 2

# What is Living Heritage?

Chapter 2

# What is Living Heritage?

## Definition

Living heritage, also called **intangible cultural heritage (ICH)**, includes practices, knowledge, and skills that communities see as part of their identity. It is passed down through generations and constantly adapted. Examples are:

- Oral traditions,
- Performing arts,
- Social practices, rituals, festivals,
- Knowledge of nature and the universe,
- Traditional craftsmanship.

Unlike monuments or objects, living heritage is **dynamic**. It exists only when people practice it.

## Dynamic Nature

Intangible heritage is *dynamic by nature*, it evolves to stay relevant. Here are a few examples of how living heritage evolves:

- **Environment**: Farmers shift planting or pruning times as climates change.
- **Generations**: Each new group adds its own twist, keeping traditions alive.
- **External influences**: Tourism, technology, or migration bring new elements.
- **Society**: Rural harvest festivals may be reinterpreted in urban contexts, helping revitalize interest, strengthen awareness, and adapt the celebration to contemporary social life.

In fact, the ability to change is what makes heritage "*living*". If a tradition stopped adapting, it would risk becoming irrelevant.

# Why It Matters

Living heritage often provides a *sense of identity and continuity*. It **binds people together**—whether it's a language spoken, a recipe passed down, or a skill learned from elders – creating social cohesion and **pride** ("this is who we are"). It also embodies **collective knowledge**. For example, many traditional practices (like herbal medicine, seed saving, water management techniques) encode a deep understanding of local ecology. This knowledge can be crucial for sustainable development: local and indigenous practices have been recognized for their potential to address contemporary issues such as biodiversity loss, climate adaptation, and community well-being. In essence, living heritage is not about nostalgia; it can be *a driver of creativity and solutions*. When communities practice and revive their heritage, they often strengthen social bonds and improve their capacity to face challenges **together**.

# Threats

Today, living heritage faces major pressures:

- Globalization and social change can lead to the loss of traditions.
- Migration may stop youth from learning local skills.
- Mass production often replaces handmade techniques.
- Education systems may undervalue local knowledge, making heritage seem "backward."
- Climate change disrupts seasonal cycles, threatening practices tied to farming or festivals.

Policymakers are only starting to recognize heritage as a resource for climate strategies. Without active support, many practices risk disappearing. This playbook operates on the belief that *revitalizing living heritage can be part of the solution*: by reinforcing cultural identity, we also strengthen social resilience, and by drawing on traditional knowledge, we might find sustainable practices that are time-tested. As the next chapter will discuss, this requires a design approach to guide change intentionally.

Before moving on, keep in mind that "*safeguarding*" living heritage does **not** mean freezing it in time. Instead, safeguarding means creating conditions for it to *continue evolving*. The 2003 UNESCO Convention encourages measures like documentation, education, and support to practitioners, to ensure that heritage can be transmitted and recreated. Our approach aligns with that: **we respect the integrity of the practice as inherited, but we also embrace innovation**. A saying often used is "tradition is not the worship of ashes, but the preservation of fire." We seek to carry the fire forward.

Chapter 3

# What is Transition Design?

Chapter 3

# What is Transition Design?

Modern societies face complex problems – climate change, biodiversity loss, unsustainable resource use, and so on. Addressing these challenges requires more than incremental tweaks; it calls for **transitions**: fundamental shifts in our systems of production, consumption, and living. **Transition design** (sometimes called transition management in some literature) is an approach to guide long-term, systemic change through inclusive, creative processes. It helps communities chart practical paths from today's situation to desired futures (e.g., a climate-resilient local food system).

At its heart, transition design recognizes that technical innovation alone is not enough to solve these big issues – we also need cultural and behavioral shifts, new governance arrangements, and grassroots initiatives. But making that leap requires intentional design, Transition design provides a framework to do this intentionally rather than leaving change to chance.

## What is a "Transition"?

In sustainability, a transition is a deep shift in a societal system that unfolds over a generation or more. Small, local experiments can grow and influence the mainstream when conditions are right. Classic examples include the transition from horse-drawn carriages to automobiles in the early 20th century, or today's ongoing energy transition from fossil fuels to renewables. This is explained by the **multi-level perspective**: innovations start in **niches** (small-scale experiments), can reshape the **regime** (the dominant way of doing things), and are affected by wider **landscape** forces (economy, crisis, culture).

# Designing Transitions:

Transitions are **iterative and cyclical**. Unlike a traditional project with a fixed deliverable, transition design is **open-ended** and **process-oriented**. It requires long-term strategic thinking and learning by doing. In practical terms, transition design often involves activities such as:

- *Strategic/orienting* (form a team, understand the system)—**Scan**
- *Tactical/agenda-setting* (develop visions and pathways)—**Select**
- *Operational/experimenting* (do projects, mobilize networks)—**Shape**
- *Reflexive* (evaluate and feed learning into the next round)—**Support**

The playbook maps this spirit to its four phases, encouraging teams to start small, *think big, learn fast, and iterate.*

A helpful analogy (gardening):

Like tending a garden: prepare the soil (*understand context*), plant seeds (*start ideas*), nurture growth (*support pilots, adjust*), and harvest results (*integrate wins and save "seeds" for the next cycle*). This emphasizes patience, care, and continuous effort.

# Core practices you'll use

- **Bring diverse stakeholders together** (elders, youth, officials, NGOs, experts).
- **Envision future possibilities**, then **backcast** to today's steps.
- **Prototype/experiment**, **monitor**, and **reflect** to improve.

These activities connect everyday projects to long-term change.

# Participation and ethics are essential

No single expert can "command" a transition. **Real** change needs **early, meaningful involvement** from those affected.Co-creation respects community knowledge and builds buy-in.

## Not “preserve at all costs”

Transition design isn’t about freezing the past. It’s about **selectively integrating** tradition and innovation. Harmful elements may need to change; promising ones can scale to meet today’s goals (e.g., reviving a drought-resistant crop for food security). The aim is to *honor the past and innovate for the future.*

## Big takeaway

Transition design links *micro-level experiments* (local projects) with *macro-level shifts* (policy, culture, economy). It provides a practical, repeatable way to move from ideas to action—learning each cycle and building momentum over time.

Chapter 4

# Who Is This For?

Chapter 4

# Who Is This For?

This playbook is for **anyone** who want to connect **living heritage** with **sustainable innovation**. It speaks to two main groups working in partnership:

- **Heritage communities and practitioners** who want their traditions to thrive today.
- **Transition facilitators and designers** who want to ground sustainability projects in local culture.

The chapter covers three things: the **audience**, the **challenges** heritage faces, and **best practices** for gathering and working with heritage information.

## Audience: *Heritage and Transition Practitioners in Partnership*

The best results come when **heritage bearers** (communities, groups and individuals or practitioners - such as youth) work together with **transition facilitators** (designers, sustainability experts, NGOs). Each brings unique strengths: elders contribute knowledge, scientists bring data, artisans offer craft, and youth add creativity. This partnership ensures co-creation instead of top-down projects.

## Challenges Facing Heritage Practices

Heritage today faces pressures that can weaken or erase practices:

- **Globalization and urbanization** shifting values and lifestyles.
- **Youth migration** leading to loss of transmission between generations.
- **Undervaluation by schools** that prioritize “scientific” knowledge.
- **Climate change** altering seasonal cycles and environments.
- **Lack of recognition and resources** for local knowledge.

Without careful support, many traditions risk disappearing even though they hold potential inspiration for sustainability and resilience.

# Best Practices for Scanning Heritage Practices

When documenting and working with heritage, several principles help avoid mistakes:

- **Inclusivity:** Make sure all voices are heard. Women, youth, or neighboring communities may carry knowledge not shared by dominant groups. Address language or dialect barriers with translators if needed.
- **Validation:** Always return findings to the community. Show them what was documented and ask if it's accurate, complete, and reflective of their view. UNESCO stresses community ownership of heritage records.
- **Avoid pitfalls:**
    1. **Rushing** – People heritage and rich stories need time.
    2. **Dominant voices** – balance input so everyone contributes.
    3. **Bias** – facilitators should record what people say, not impose categories.
    4. **Overpromising** – be clear about the project's scope to manage expectations.

Done well, scanning itself becomes valuable: even if no further project happens, the practice is at least documented for future generations For more, check the 2003's Convention for Ethical and Principles in ICH.

Chapter 5

# The Four-Phase Process: Scan, Select, Shape, Support

Chapter 5

# The Four-Phase Process: Scan, Select, Shape, Support

In this chapter, we lay out the step-by-step process for transitioning a heritage practice. The process is organized into four phases – **Scan, Select, Shape, Support** – which contain a total of 7 steps. The phases correspond to a logical flow: from understanding the practice, to assessing its situation, to co-creating ideas, to implementing actions. However, each phase is broken into more detailed steps to ensure clarity and thoroughness.

Each step is presented in a uniform format:

| | |
|---|---|
| **WHAT** | A brief definition of the step – what it entails. |
| **WHY** | The reasoning – why this step matters and how it contributes to the overall process. |
| **HOW** | Concrete guidance on how to carry out the step. Including facilitation techniques and materials needed. |
| **OUTPUT** | What the expected result of the step is (e.g. a document, a list of ideas, etc.). |

In addition to the step-by-step instructions, we provide **Facilitation Tips, Materials, Duration, and Common Pitfalls** (either integrated into the "how" or explicitly noted) to support you in planning and running each activity effectively. Think of these as “pro tips” for workshop facilitators or project leads—practical insights drawn from experience and research on best practices.

Before diving in, a note on **flexibility**: although the steps are numbered for clarity, the process is not strictly linear. You may find yourself iterating—for example, while in Step 5 (*Support Ideas*), you might realize you need additional insights and circle back to Steps 1–2 (*Scan Information*). This is not only okay but expected; the process is often cyclical. Treat the steps as a roadmap, and adapt them as needed for your context.

SCAN

# 1. Environmental Challenge Discovery

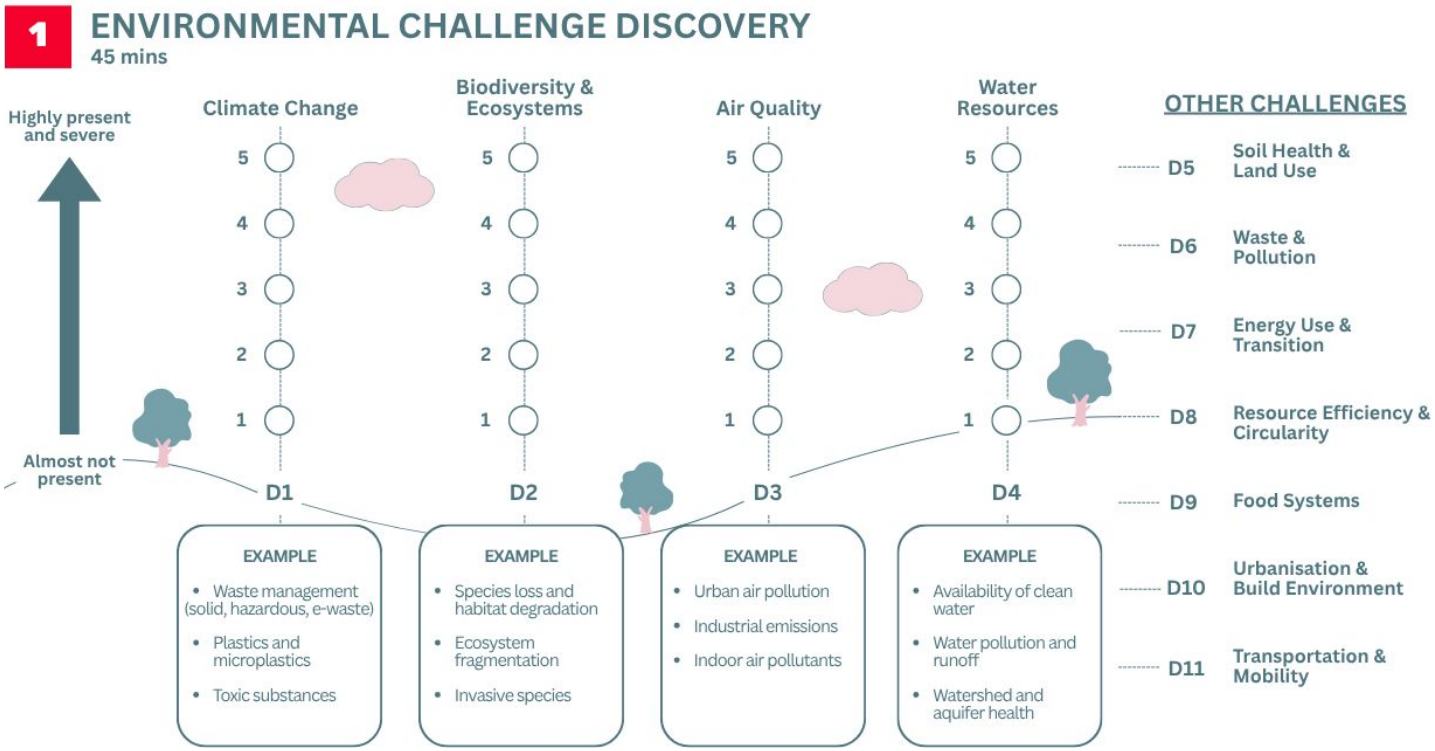
This challenge discovery activity helps the group build shared awareness of the environmental pressures shaping their context. Instead of jumping to solutions, the goal is to map out the landscape of ecological drivers (e.g., water stress, soil loss, pollinator decline) so that later efforts address real and pressing challenges, not personal hunches. By diverging broadly and then clustering, the team creates a clear, collective picture of which environmental issues matter most in the next 3–5 years.

## WHY

To align on the real ecological pressures shaping the context, ensuring that future ideas target meaningful outcomes rather than pet solutions. This step sets the foundation for prioritization by surfacing a broad, shared picture of challenges, including weak signals that might otherwise be overlooked.

## WHAT

A fast, divergent to convergent exercise that results in a clustered map of local pressing environmental challenges. The group names and clusters challenges in plain language to create a usable “long list” for prioritization.



# HOW

1. **Set a Focus Question**
   Example: *"Which environmental challenges most affect our orchards/landscape in the next 3–5 years?"*

2. **Together-Alone Divergence (5–7 min)**
   Each person writes one challenge per sticky note, adding a short "because…" driver for context.

3. **Share & Cluster**
   Participants read their stickies aloud. The facilitator helps de-duplicate, cluster, and name groups in simple terms.

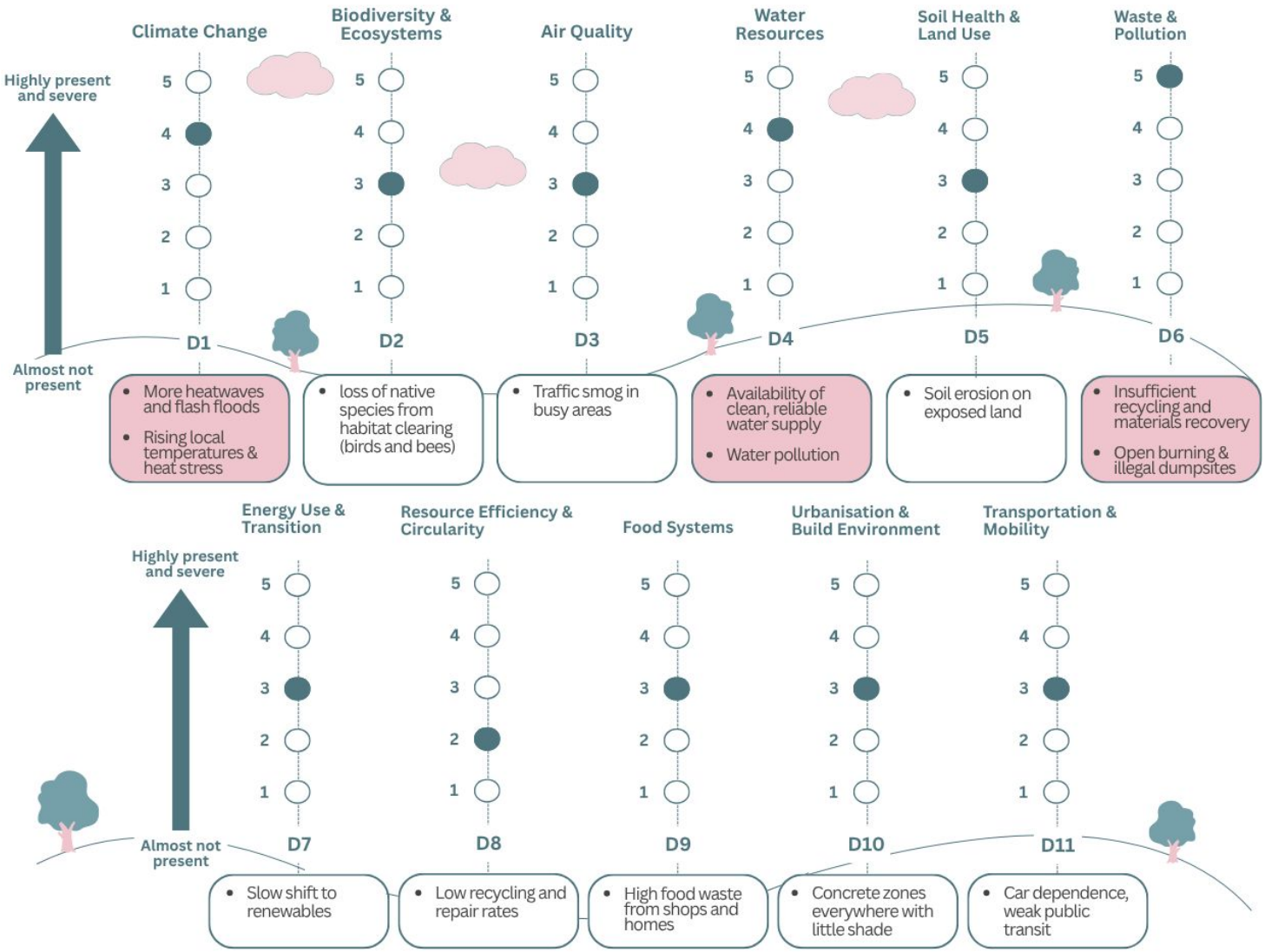
4. **Optional Layer**
   Tag each cluster with a complexity label (Simple, Complicated, Complex, Chaotic) as a signal for later discussions.

# OUTCOME

A wall of environmental challenges, clearly labeled and clustered, representing a collective long list of pressures. This visual map serves as input for **Activity 2: Challenge Prioritization**, where the group will focus down to the most impactful and feasible challenges.

## 1 ENVIRONMENTAL CHALLENGE DISCOVERY

45 mins




**Example Top 3:**

1. **Waste & Pollution (D6)** – 5
2. **Climate Change (D1)** – 4
3. **Water Resources (D4)** – 4

## FACILITATION TIPS

- **Anchor the scope.** Frame the focus question for each environmental challenge dimension carefully so the group considers *local, tangible* challenges, not global generalities.
- **Push for specificity.** If participants say "climate change," ask: "How does that show up here?" (e.g., late frosts, unpredictable rain).
- **Balance voices.** Start with silent, individual writing to give everyone space, then move to group clustering.
- **Name simply.** Use clear, everyday language for cluster titles so the whole group can recall them later.
- **Prevent solution-jumping.** If someone suggests fixes, redirect: *"Hold that thought — we'll get to solutions later. For now, let's capture the challenges."*
- **Manage time.** In large groups, limit sharing to 2–3 top challenges per person to avoid fatigue.

SCAN

# 2. Challenge Prioritization

This activity helps the group narrow a long list of environmental pressures to a focused set of priority challenges. Using an Impact–Difficulty Matrix, participants weigh ecological benefits against feasibility, ensuring alignment on the most promising challenges to pursue.

## WHY

To narrow a broad, clustered challenge map into a clear set of Top 5 priorities that balance **ecological significance** with **perceived practical feasibility**. This focus allows later steps (heritage lever mapping, opportunity generation) to concentrate on challenges that matter most and are realistically actionable.

## WHAT

A **2×2 matrix** with axes:

**Impact** (ecosystem benefits, resilience gains) on the Y-axis.

**Difficulty** (resources, cost, time, coordination) on the X-axis.

The stickies with environmental challenge that received votes from Activity 1 will be placed on the 2x2 matrix, followed by a group discussion, and final vote to select the Top 5.

**2** CHALLENGE PRIORITIZATION
30 mins

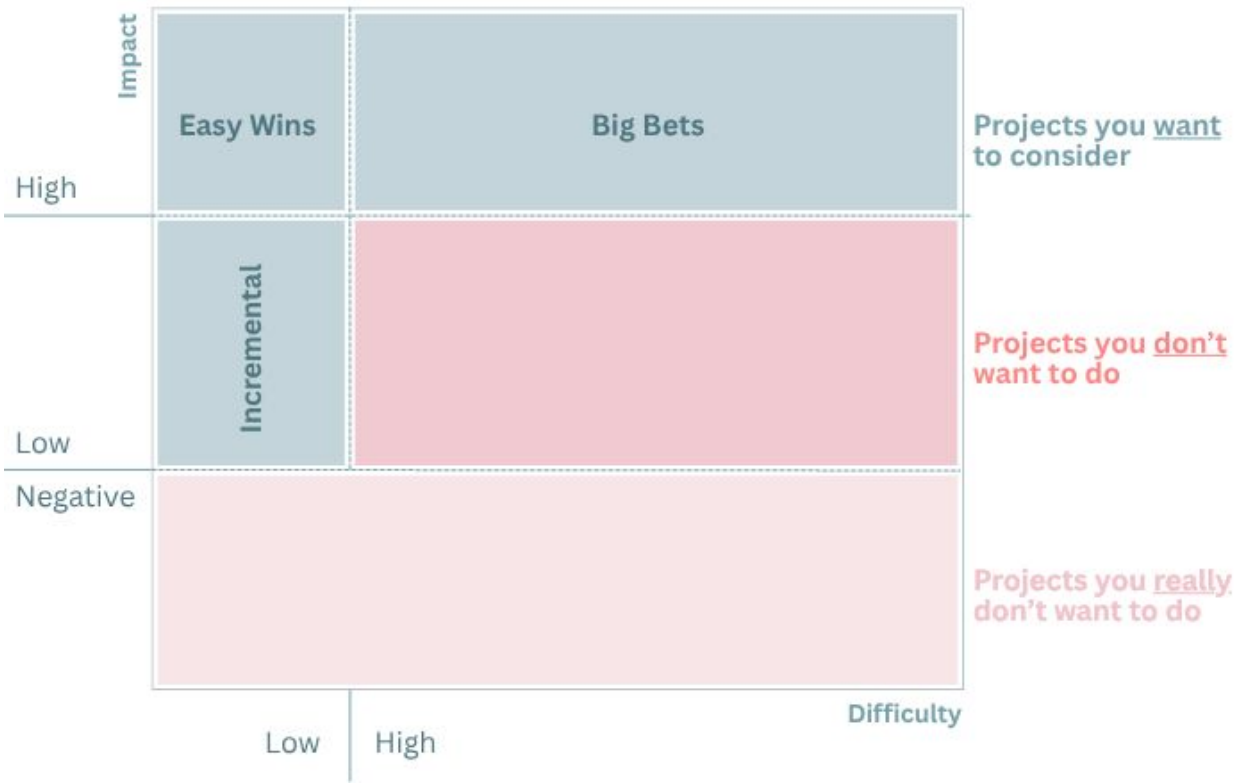
# HOW

1. **Prep**
   Copy the challenge stickies from Activity 1 under the blank grid.

2. **Plot by IMPACT first (up/down)**
   Take any sticky as the reference and place it mid-Y.
   For each next sticky: “Will solving this create **more or less ecological impact** than the last placed one?” Place higher/lower accordingly. Aim for relative order, not perfection. (5–7 min)

3. **Plot by DIFFICULTY next (left/right)**
   Starting near the top items, ask: “Is this **easier or harder** to solve than the one above it?” Move left (easier/sooner) or right (harder/later). Sweep through all items. (5–7 min)

4. **Reveal quadrant overlays & adjust**
   Briefly name quadrants; invite quick micro-moves to correct obvious outliers. Keep it brisk. (3–5 min)




5. **Select the Top 5**
   Silent dot-vote simultaneously (1–2 dots pp). Break ties with a quick revote. Circle or star the winners. (3–5 min)

# OUTCOME

A **Top-5 Environmental Challenges (EC) list** with coordinates on the grid (photo & export for later exercises). Clear team alignment on **what to pursue now** and what to park

**Choose 5:**
Challenge #1
Challenge #2
Challenge #3
Challenge #4
Challenge #5


## FACILITATION TIPS

- **Hide quadrant labels** until *after* all stickies are placed to reduce bias.
- Use **relative comparison** ("more/less than previous") to move fast; don't debate absolute scores.
- Keep the **center of mass** roughly centered on each axis as you go; make small adjustments at the end.
- For larger groups, let participants **self-select only their top 1–2 items to read** to keep signal high.
- Run **simultaneous voting** (everyone posts votes at once) to avoid anchoring. If needed, allow 2 votes pp and permit stacking.
- Timebox share-outs; invite people to **read the sticky as written** (no stories). Use a visible timer.
- If debate stalls, ask: "Given our goals, which item **moves ecosystem outcomes most, soonest**?" Then place and proceed.
- Photograph the grid **before moving** anything to preserve the layout for later steps.

SELECT

# 3. Heritage Practice Listing

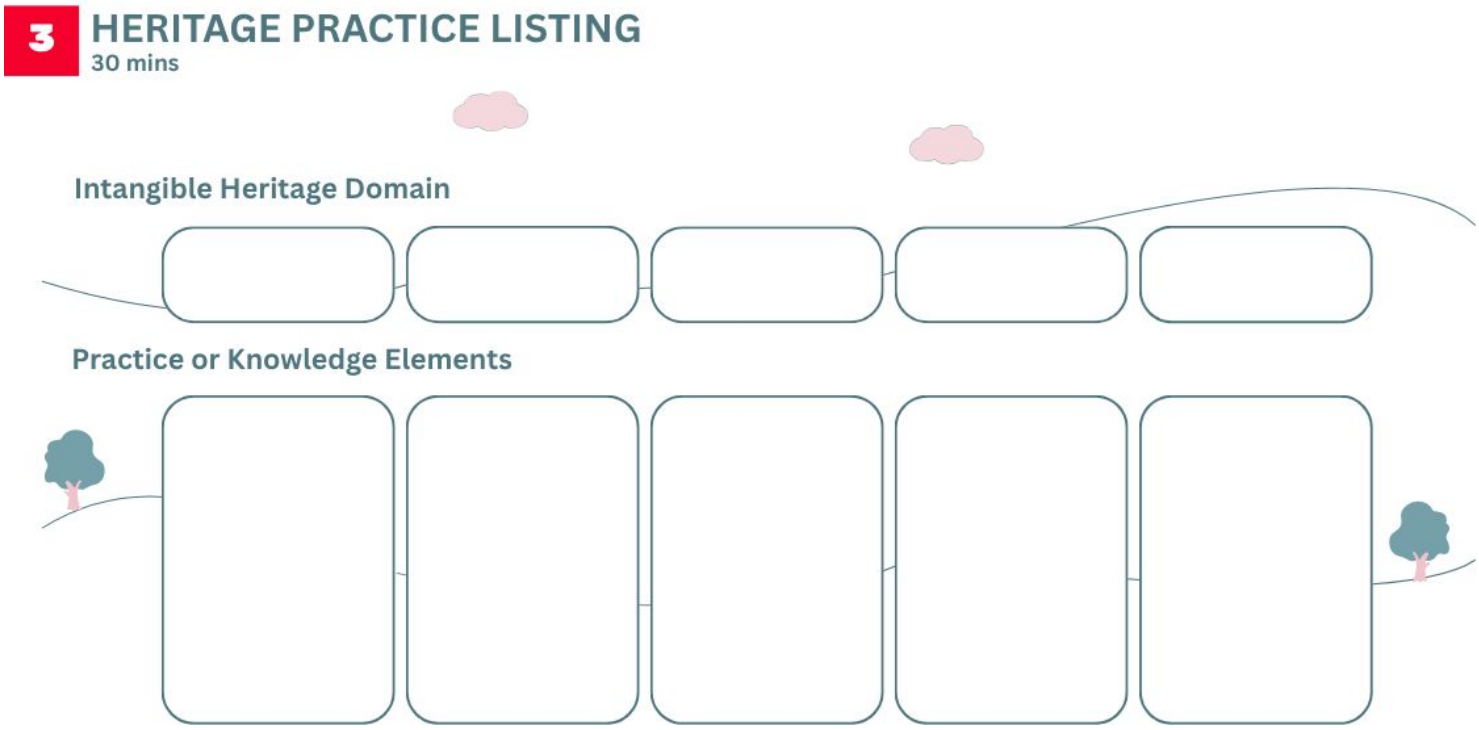
You've chosen your Top-5 environmental challenges. Now surface the accessible living-heritage practices within your team that could *move those needles*—and capture the function each practice provides so we can match them later.

## WHY

To treat heritage as capability: map and understand **what a practice *does*** (its function), not just what it *is*, so we can pair the right lever to the right challenge in the next step.

## WHAT

A structured wall of potential heritage practice "levers" with functional tags (e.g., espalier fruit craft, pruning techniques, grafting, planting techniques, orchard maintenance, fruit conservation techniques, etc.) . The intent is to put one core knowledge or craftsmanship element per sticky; write in headlines.



# HOW

1. **Set the heritage domain(s) (2 min)**
Identify the relevant (and accessible) heritage domains for your case—one or several (e.g., fruit heritage; grassland irrigation; beekeeping). As facilitator, you probably know your team's expertise, so you can prefill these domains at the top of the canvas.

   *What heritage experts can we look for?*
   *We highlight two relevant UNESCO domains of intangible cultural heritage that can be mapped:*

   - ***Knowledge and Practices concerning Nature and the Universe:*** *Traditional Ecological Knowledge (TEK), Indigenous and community systems for managing ecosystems—e.g., intercropping, terrace farming, water management; seasonal/phenological planting calendars; and oral traditions that guide environmental stewardship.*
   - ***Traditional Tools:*** *Generational manual skills and tools for the making of and artisanal practices—e.g., agricultural tools, storage and food-processing equipment; ceramics and glass, textiles and fibre arts, woodworking, metalwork and jewelry, leatherwork, basketry, paper crafts, and other locally rooted decorative forms.*

2. **Together-alone listing (7–10 min)**
Each person lists 10–15 practices per heritage domain, with short, clear descriptions. Use the guiding question: "Which domain-specific practices do you know?" Don't evaluate their usefulness for environmental issues yet. The goal is to map your heritage domain into *distinct knowledge and craftsmanship building blocks*, being able to share a oversimplified yet structured overview of your heritage field with the team.

3. **Read, de-dupe, clarify (12–20 min)**
Read stickies as written; facilitator removes duplicates. Team flags unfamiliar practices. Each unknown practice is briefly explained it's core function (≤30s) for shared understanding. No ideation yet, just build minimal initial alignment.

# OUTCOME

An initial **heritage practice inventory lever wall**, ready to prioritize in Activity 4 and to cross with challenges in Activity 5.

## FACILITATION TIPS

- **Prime for function:** If people describe form ("pruning practices"), ask "What does it *do*?" (e.g., *frost buffering, shade, humidity retention*).
- **Bias guards:** Use *together-alone* writing and timeboxes; keep share-outs crisp; avoid stories.
- **Clustering discipline:** Name clusters by **function** first; only later by practice type. De-duplicate aggressively.
- **Colors help:** Reserve a color for **ethics flags** and another for **constraints** so they stand out during later prioritization.
- **When debate stalls:** Borrow the Problem-Categorization move—ask relative questions ("*Does this practice provide **more or less** impact on X than that one*?") to move on.
- **Document before moving:** Always photo the wall before you rearrange or carry items forward.

SELECT

# 4. Heritage Lever Prioritization

You've mapped many heritage practice levers. Now narrow to the five that have most potential to address the selected environmental challenges using a fast Impact × Potential matrix.

## WHY

To narrow the heritage practice map, the group prioritizes practices by potential environmental impact and adaptability across contexts and use-cases. From this, they select the Top 5 to carry forward into opportunity design.

## WHAT

**A 2×2 matrix with axes:**

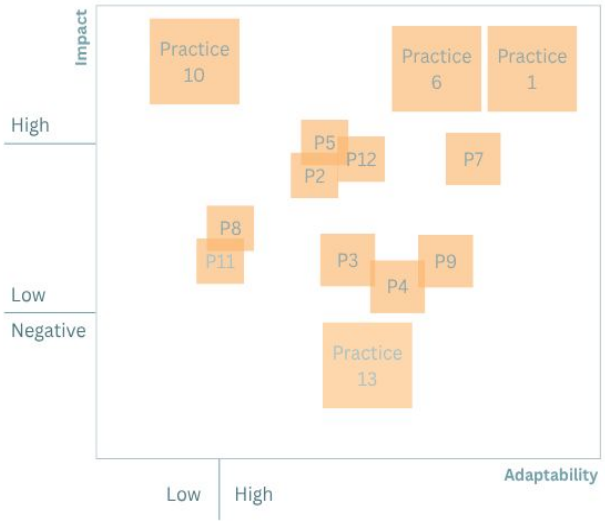
**Impact** (ecosystem benefits, resilience gains) on the Y-axis.

**Adaptability** (conditions, context, use-cases, capacity, cost, policy) on the X-axis.

The stickies with heritage practice inventory that were listed in activity 3 will be placed on the 2×2 matrix, followed by a group discussion and final vote to select the Top 5.

## 4 HERITAGE LEVER PRIORITIZATION

30 mins



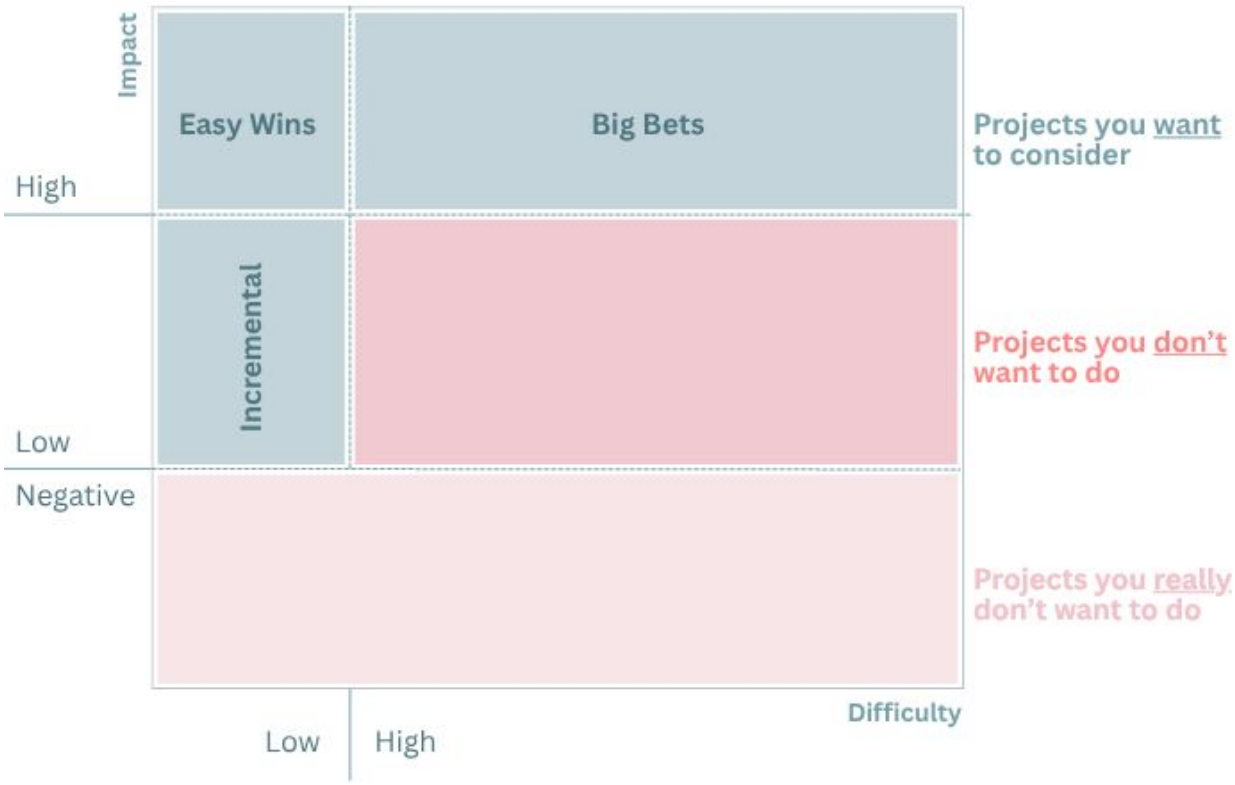
# HOW

1. **Prep**
   Copy the heritage practice inventory stickies from Activity 3 under the blank grid.

2. **Plot by IMPACT first (up/down)**
   Take any sticky as the reference and place it mid-Y.
   For each next sticky: “Has this heritage practice **more or less potential for ecological impact** than the last placed one?” Place higher/lower accordingly. Aim for relative order, not perfection. (5–7 min)

3. **Plot by ADAPTABILITY next (left/right)**
   Starting near the top items, ask: “Has this practice the potential to be adapted to different contexts or use-cases?” Move left (plenty/big) or right (few/small). Sweep through all items. (5–7 min)

4. **Reveal quadrant overlays & adjust**
   Briefly name quadrants; invite quick micro-moves to correct obvious outliers. Keep it brisk. (3–5 min)




5. **Select the Top 5**
   Silent dot-vote simultaneously (1–2 dots pp). Break ties with a quick revote. Circle or star the winners. (3–5 min)

# OUTCOME

By the end of the activity, the group will have a clear, collectively agreed shortlist of the **Top 5 heritage practices (HP)** that combine high environmental impact with strong adaptability across contexts and use-cases. This prioritized set provides a focused foundation for the next stage of opportunity design.

**Choose 5:**
Practice #1
Practice #2
Practice #3
Practice #4
Practice #5


## FACILITATION TIPS

- **Hide quadrant labels** until *after* all stickies are placed to reduce bias.
- Use **relative comparison** ("more/less than previous") to move fast; don't debate absolute scores.
- Keep the **center of mass** roughly centered on each axis as you go; make small adjustments at the end.
- For larger groups, let participants **self-select only their top 1–2 items to read** to keep signal high.
- Run **simultaneous voting** (everyone posts votes at once) to avoid anchoring. If needed, allow 2 votes pp and permit stacking.
- Timebox share-outs; invite people to **read the sticky as written** (no stories). Use a visible timer.
- If debate stalls, ask: "Given our goals, which item **moves ecosystem outcomes most, soonest**?" Then place and proceed.
- Photograph the grid **before moving** anything to preserve the layout for later steps.

SHAPE

# 5. Transition Opportunity Matrix

Cross your Top-5 challenges (activity 2) with Top-5 heritage levers (activity 4) to generate concrete transition opportunities with clear mechanisms of change.

## WHY

To move from lists to testable options: pairing the right lever to the right challenge reveals **how** heritage practices can accelerate targeted ecological and environmental transitions.

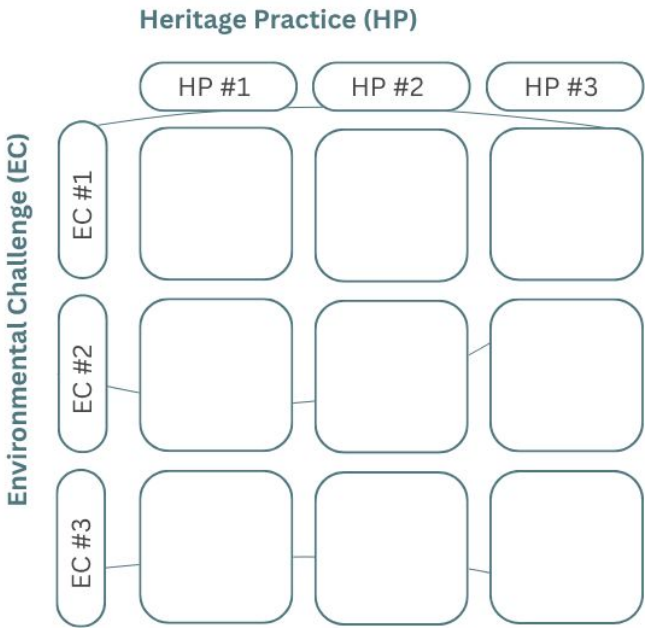
## WHAT

A **5×5 grid** (Challenges × Levers). At each intersection, capture:

- **Opportunity idea** (one headline).
- **Mechanism of change** (what function of the lever moves the challenge).
- **Key assumptions/conditions** (what must be true).

Keep items short, one idea per sticky, written in headlines.

**5** TRANSITION OPPORTUNITY MATRIX
30 mins



# 5 TRANSITION OPPORTUNITY MATRIX

30 mins

# HOW

1. **Set up (2 min)**
   Use the 5×5 matrix. Put **Top-5 Environmental Challenges** (taken from activity 2) on rows, **Top-5 Heritage Levers** (taken from activity 4) on columns.

2. **Together-alone ideation (8–10 min)**
   For each assigned row/column, write **1 or multiple ideas per intersection** answering: "**How might Lever X reduce/mitigate/restore Challenge Y?** One idea per sticky.

3. **Share & cluster (6–8 min)**
   Read stickies **as written**; quickly de-duplicate and cluster near-duplicates **at the cell** so the ideas remain visible. Timebox to keep signal high.

4. **Optional sharpening (2–3 min)**
   Rewrite unclear items into crisp **How-Might-We** headlines; keep mechanism explicit. If debate stalls, use **relative comparison** prompts ("Does this idea change the outcome **more or less** than that one for this challenge?") to move on.

# OUTCOME

A populated **Opportunity Matrix**: clustered ideas at each intersection, ready for prioritization in Activity 6.

## FACILITATION TIPS

- **Prime for function:** If people describe form ("espalier furniture"), ask "What does it *do*?" (e.g., *greening the city, biomaterial*).
- **Bias guards:** Use *together-alone* writing and timeboxes; keep share-outs crisp; avoid stories.
- **Clustering discipline:** Name clusters by **function** first; only later by practice type. De-duplicate aggressively.
- **Document before moving:** Always photo the wall before you rearrange or carry items forward.

SHAPE

# 6. Opportunity Prioritization

You've generated a field of opportunities (5×5). Now categorise and prioritise to the 2–3 using the by now well-known Impact × Effort matrix.

## WHY

List the top ideas from the brainstorm (Activity 5) that both accelerate a climate-robust future and are realistically executable next, in line with the team's expectations and ambitions.

## WHAT

**A 2×2 matrix with axes:**

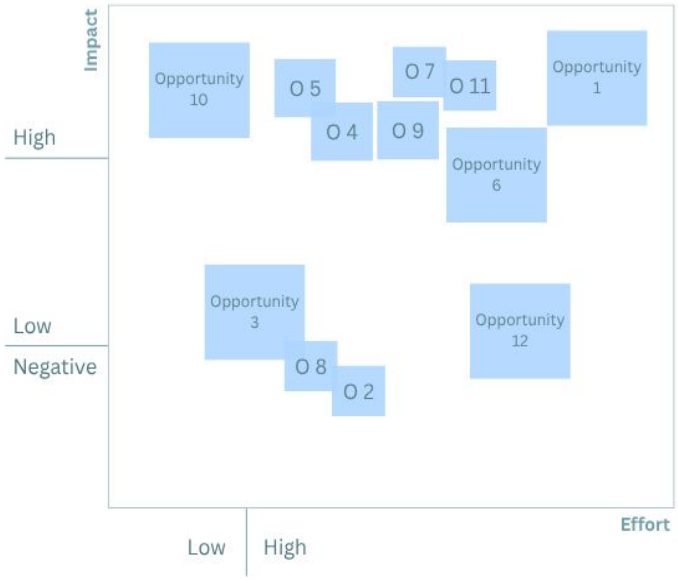
**Impact** (ecosystem benefits, resilience gains) on the Y-axis.

**Effort** (resources, partners, technical feasibility, timeframe) on the X-axis.

The stickies with niche transition opportunity ideas that were ideated in activity 5 will be placed on the 2×2 matrix, followed by a group discussion and final vote to select the Top 3.

## 6 OPPORTUNITY PRIORITIZATION

30 mins



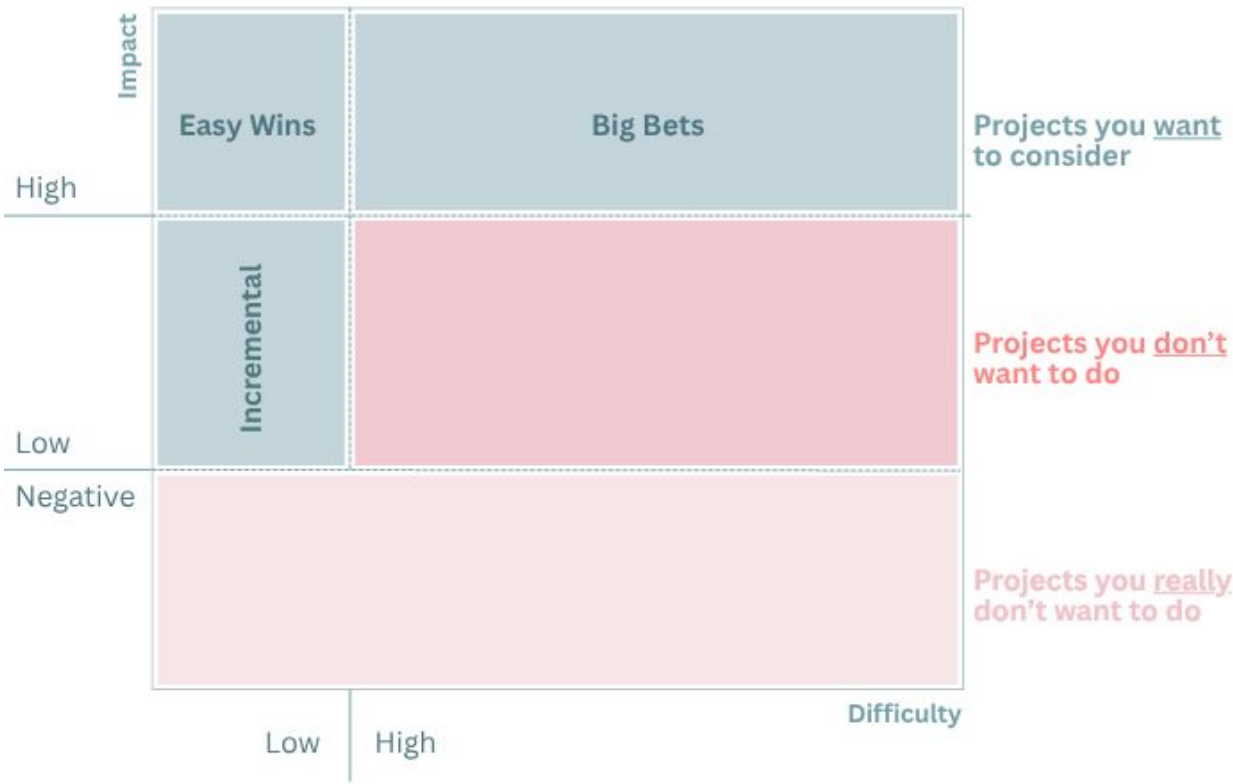
# HOW

1. **Prep**
Copy the niche transition opportunity idea stickies from Activity 5 under the blank grid.

2. **Plot by IMPACT first (up/down)**
Take any sticky as the reference and place it mid-Y.
For each next sticky: “Has this transition idea **more or less potential for environmental impact** than the last placed one?” Place higher/lower accordingly. Aim for relative order, not perfection. (5–7 min)

3. **Plot by EFFORT next (left/right)**
Starting near the top items, ask: “Is this **easier or harder** to implement than the one above it?” Move left (easier/sooner) or right (harder/later). Sweep through all items. (5–7 min)

4. **Reveal quadrant overlays & adjust**
Briefly name quadrants; invite quick micro-moves to correct obvious outliers. Keep it brisk. (3–5 min)




5. **Select the Top 5**
Silent dot-vote simultaneously (1–2 dots pp). Break ties with a quick revote. Circle or star the winners (Top 3). (3–5 min)

# OUTCOME

By the end of the activity, the group will have a clear, collectively agreed shortlist of the **Top 3 niche transition ideas** that showcase potential high environmental impact with a feasible level of change. This prioritized set represents the final outcome of the process: **ideas most likely to be operationalized to accelerate the green transition while leveraging heritage practices.**

**Choose 3:**
Idea #1
Idea #2
Idea #3


## FACILITATION TIPS

- **Hide quadrant labels** until *after* all stickies are placed to reduce bias.
- Use **relative comparison** ("more/less than previous") to move fast; don't debate absolute scores.
- Keep the **center of mass** roughly centered on each axis as you go; make small adjustments at the end.
- For larger groups, let participants **self-select only their top 1–2 items to read** to keep signal high.
- Run **simultaneous voting** (everyone posts votes at once) to avoid anchoring. If needed, allow 2 votes pp and permit stacking.
- Timebox share-outs; invite people to **read the sticky as written** (no stories). Use a visible timer.
- If debate stalls, ask: "Given our goals, which item **moves ecosystem outcomes most, soonest**?" Then place and proceed.
- Photograph the grid **before moving** anything to preserve the layout for later steps.

SUPPORT

# 7. Heritage Integrity & Consequence Check

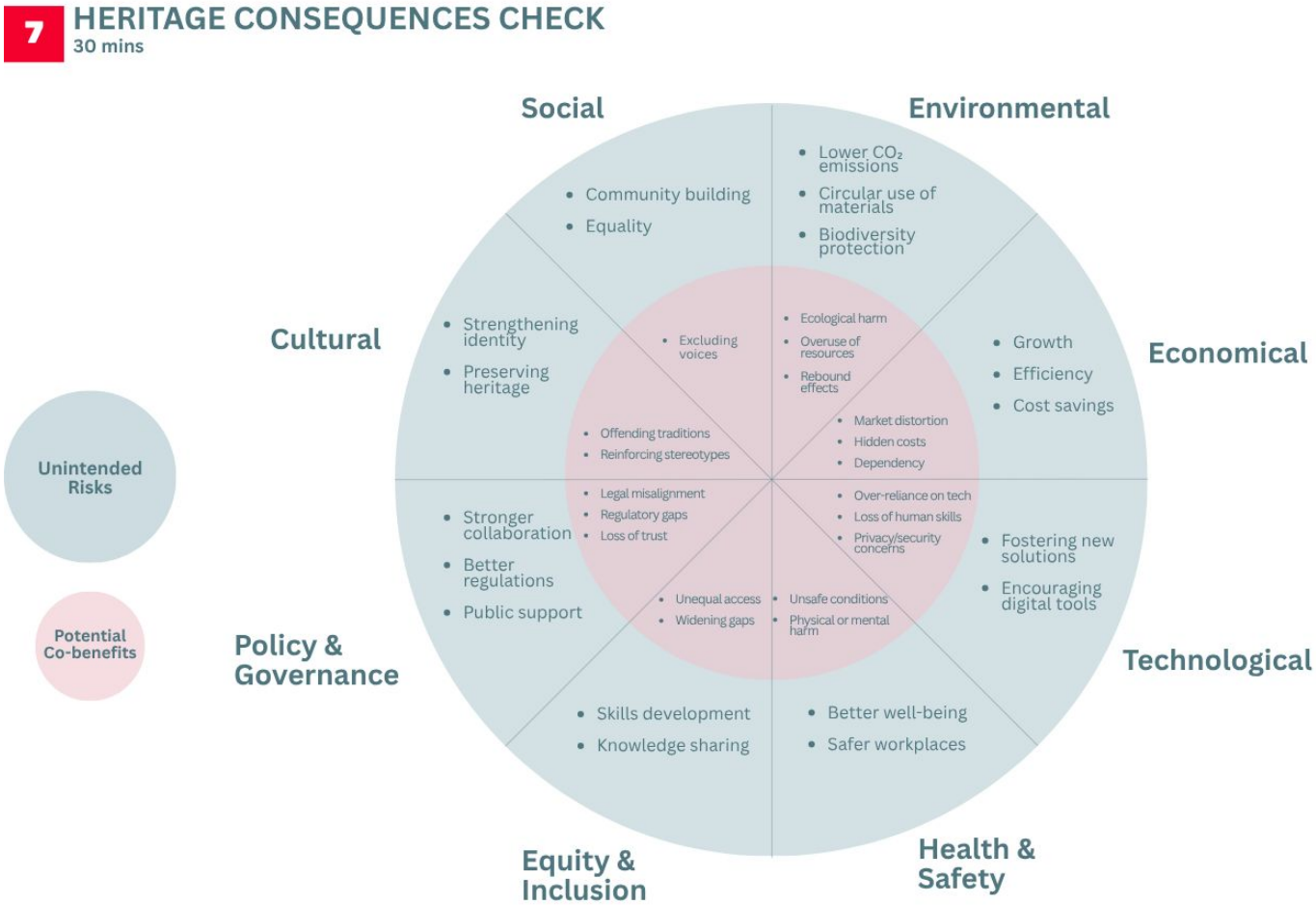
Explore the SUPPORT needed to implement these ideas and assess risks or sensitivities tied to the heritage practices behind them.

## WHY

To safeguard living heritage and communities, avoid harm, and set clear safeguards. Ensures actions are ethical, consented, and resilient.

## WHAT

Implement, monitor, and safeguard the initiatives so they are ethical, effective, and sustainable. Use a Support Canvas **(one page per initiative)** with six domains.



# HOW

1. **Assemble the right group (2 min)**
   Core team + heritage bearers + anyone responsible for consent, data, or land access.

2. **Walk the six checks (12–18 min)**
   For each check, capture: key concerns, **mitigations/safeguards**, and owners. Rate **R/A/G** (Red/Amber/Green). Add notes for any conditions (seasonal limits, attribution rules, guardianship).

3. **Decide the path (3–5 min)**

   a. **Proceed** (all green)

   b. **Proceed with safeguards** (greens + manageable ambers; list conditions & owners)

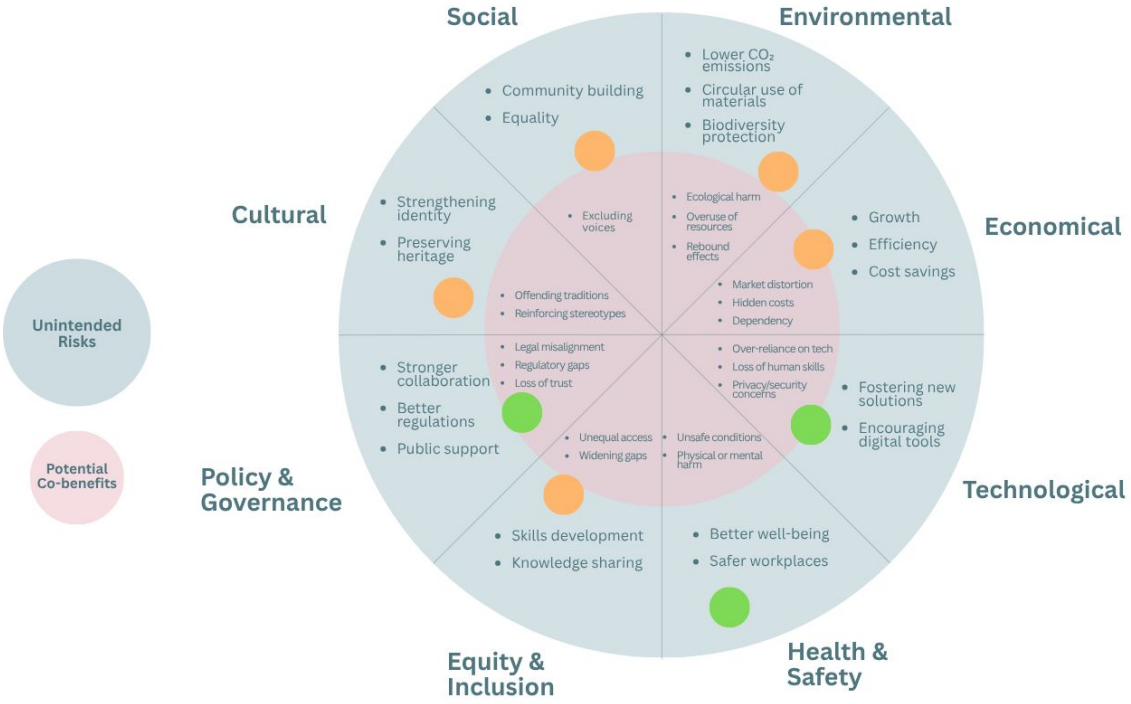
   c. **Redesign** (reds to resolve; loop back to Act. 5)

   d. **No-Go** (stop; record rationale)

4. **Lock the record (1–2 min)**
   Finalize the canvas (photo + file). Set and decide on next steps.

# OUTCOME

Completed **Support Canvases** (with risks and benefits mapped); A **signed Consequence Canvas** per opportunity; Clear **go / conditions / rework / no-go** decision; Named owners, next actions, and timelines for safeguards & consent.



## FACILITATION TIPS

- **Center the bearers.** Let tradition holders lead on Integrity and Consent; your role is to listen, clarify, and document.
- **Use concrete scenarios.** “Show me how this would happen in May at X site” reveals hidden burdens and trade-offs.
- **Default to clarity.** If consent is partial or informal, mark **Amber** and specify *exactly* what’s missing (who, how, when).
- **Name the burden.** If the practice adds maintenance or seasonal strain, write it and assign support (training, staffing, stipend).
- **Separate excitement from ethics.** Park “cool idea” talk; finish all six checks before debating value.
- **Respect restricted knowledge.** If elements are sacred/closed, redesign around them or stop; do not “document for later.”
- **License & data now, not later.** Decide file holders, access rights, attribution, and sharing licenses on the canvas.
- **Green ≠ free-for-all.** Greens can still require conditions (seasonal limits, credit lines, benefit-sharing). Write them.
- **When stuck, ask:** “What safeguard makes this safe *enough* for a small pilot?” If none, it’s a **No-Go**.
- **Close the loop.** Schedule a safeguard check-in before pilots start; no safeguards implemented = no pilot.

Chapter 6

# Walk-Through Example: The Espalier Case Study

Chapter 6

# Walk-Through Example: The Espalier Case Study

To see how the process works in practice, the playbook follows a fictional but realistic case: **Greenvalley**, a small town with a tradition of training pear and apple trees flat against walls (an espalier technique). The practice had nearly disappeared as industrial orchards took over, but elders, youth, and a local NGO worked together to revive it.

## Step 1–2: *Scanning* Knowledge and Context

The project **Revitalizing the Art of Espalier Fruit Trees in Greenvalley**, began with a small team: elders known for espalier, a young farmer, and a local NGO. They collected old photos, notebooks, and stories. Then they organized a workshop where elders explained and demonstrated the technique. Younger participants drew seasonal calendars and maps of where espalier trees once stood.

This process not only preserved technical *know-how*, but also created pride and energy in the community.

## Step 3–4: *Selecting* Priorities

By this stage, the community had already mapped a wide range of heritage practice "levers"—everything from pruning methods to tree varieties, wall placement, and festival traditions. But not all of them could realistically help address Greenvalley's pressing environmental challenge: **increasing spring frosts**.

To focus efforts, the team used a quick **Impact × Potential matrix**. Each practice was judged on:

**Impact** How much it could help with frost resilience, community pride, or sustainability.

**Potential** How feasible it would be to apply, given time, space, and available people.

In a one-hour workshop, participants placed sticky notes on the grid. The five practices that scored highest were:

1. **Training** new apprentices in espalier pruning,
2. **Planting** a community orchard along a south-facing wall,
3. **Hosting** an annual fruit festival,
4. **Recording** and sharing knowledge with youth,
5. **Testing** heritage varieties for climate resilience.

These became the focus for the next phase.

## **Step 5–6:** *Shaping* and Planning Ideas

A combination of Ideation and Brainstorming ideas led to five **concrete actions:**

- **Training program:** structured apprenticeships for youth,
- **Community orchard:** a visible, shared site for espalier,
- **Urban microclimate:** apply espalier on standoff trellises along exterior walls to help reduce wall and local air temperatures
- **Product development:** *"Espalier roof for Bus Stop benches"*, increases green areas in public spaces,
- **Policy advocacy:** to protect heritage trees and the practices of pruning them.

Each idea was turned into a plan with roles (elders, youth, NGO, municipality), timelines, and resources. Ethical checks ensured fair ownership and benefit-sharing..

## **Step 7:** *Supporting* Actions

Over the next year, actions came to life:

- Apprenticeships trained ten new espalier practitioners.
- A community orchard was planted with 20 young trees.
- 2 prototype  bus stops installed with espalier roofs, riders report cooler wait areas.
- Façades fitted with espalier, residents report better shade on sidewalks.
- Policy-makers added espalier heritage to the town's cultural plan.

The community also handled challenges. When pests attacked trees, young farmers tested organic solutions with guidance from elders. This boosted both **confidence and resilience**

# Results

Within two years, espalier was no longer “at risk.” It was **thriving**:

- New practitioners continued teaching others,
- A club was formed with shared leadership,
- Orchards produced fruit for community and small sales,
- The town council provided annual support,
- The practice gained regional recognition, even inspiring neighboring towns.

Greenvalley showed how living heritage can be **revitalized**: honoring tradition, adapting to modern challenges, and becoming a driver of climate resilience and community pride.

Chapter 7

# What Next: From Mapping to Action

Chapter 7

# What Next: From Mapping to Action

Completing one project is only the beginning. To keep heritage alive, communities need to **consolidate gains, scale success, and stay adaptive**.

## Celebrate and Share

After a year, communities should review progress and celebrate achievements.

- **Document outcomes:** Record numbers (e.g., how many youth trained, trees planted, events held).
- **Celebrate successes:** Hold a community event or small ceremony. Greenvalley, for example, gave certificates to apprentices and thanked elders while sharing local pear treats.
- **Communicate results:** Share with councils, networks, and media to build visibility and attract support.
- **Reflect on lessons:** Discuss what worked, what didn't, and what to adjust next time.
- **Institutionalize gains:** Anchor the practice into permanent structures, such as a club, cooperative, or school curriculum.

## Scale Up or Out

Once stable locally, heritage initiatives can **scale up or out.**

- **Scaling up** means integrating practices into larger systems (e.g., official policies, regional cultural programs).
- **Scaling out** means inspiring neighboring towns or groups to adapt the model. Greenvalley's espalier revival, for example, was later shared at a regional workshop, inspiring other towns..

Partnerships with regional or national networks help amplify impact and connect communities with funding and expertise.

## Integrate into Bigger Frameworks

Lasting change often needs local authorities, schools, or NGOs to integrate the practice. Examples:

- A town council including it in cultural plans,
- A school adding it to curriculum,
- An NGO securing funds for continuity.

## Monitor and Adapt

Transitions are **cyclical**: each round of action leads into the next. Communities should monitor results, reflect on changes, and restart the process with new insights. Small adjustments accumulate into long-term resilience. Examples are.:

- Number of new practitioners,
- Survival rate of new trees,
- Income from products,
- Youth involvement.

## Grow and Connect

Once the practice is stable locally, look outward. Can nearby towns replicate it? Can your project join a regional or international network? Scaling can mean sharing knowledge, forming alliances, or inspiring policies that protect heritage on a larger scale.

## The Ongoing Journey

Heritage transitions are never “finished.” They are cycles of Scanning, Selecting, Shaping and Supporting. Each round deepens knowledge, builds community, and adapts to new challenges. The more cycles a community completes, the stronger and more resilient its heritage becomes.

# Appendix A: Glossary of Key Terms

**A**

**Apprenticeship:** A method of transmitting skills by learning on-the-job from an experienced practitioner (master). Common in craft and performing arts heritage.

**F**

**FPIC, Plural Knowledge, Data Sovereignty (as abbreviations):** FPIC stands for Free, Prior, Informed Consent; plural knowledge systems recognize multiple ways of knowing; data sovereignty refers to local control of knowledge data.

**Free, Prior and Informed Consent (FPIC):** A specific right of Indigenous peoples now broadly applied as best practice, requiring that any activity or research involving a community's knowledge or territory must have their freely given consent, obtained prior to the activity, with all necessary information provided. Communities can say no or set conditions.

**H**

**Heritage-based Solution:** A solution to a contemporary problem that originates from traditional or cultural practices. For example, using traditional water-harvesting methods to address modern water scarcity is a heritage-based solution.

**Heritage Community:** A group of people who share, practice, or value a certain heritage element. They are the social group for whom the heritage is meaningful.

**I**

**Indigenous/Data Sovereignty:** The concept that Indigenous peoples (or local communities) have the right to govern the collection, ownership, and application of data about their members, traditions, and environment. It's about controlling how knowledge is used and shared.

**Intangible Cultural Heritage (ICH):** Practices, expressions, skills, and knowledge that communities recognize as part of their cultural heritage. Also called living heritage. It is passed down through generations and continuously recreated. **Examples**: (a) oral traditions and expressions, including language as a vehicle of the intangible cultural heritage; (b) performing arts; (c) social practices, rituals and festive events; (d) knowledge and practices concerning nature and the universe; (e) traditional craftsmanship.

**K**

**Knowledge System:** A way of knowing and explaining the world. Diverse knowledge systems include scientific knowledge, Indigenous knowledge, local experiential knowledge, etc. A pluralistic approach values multiple knowledge systems and seeks to bridge them equitably.

**L**

**Living Heritage:** Another term for ICH, emphasizing that these cultural expressions are alive, evolving, and adapting. Living heritage requires active practice to exist (unlike a monument which exists physically).

**M**

**Multi-level Perspective (MLP):** In transition theory, a framework that views change as happening on three levels: niche (innovations), regime (established system), and landscape (wider environmental context). It's a theoretical term explaining how small innovations can eventually transform big systems.

**P**

**Participatory Approach:** An approach where stakeholders (especially those directly affected) are actively involved in decision-making and implementation, rather than top-down decisions. For heritage, this means community members lead and shape the process of safeguarding their heritage.

**R**

**Resilience (of a practice):** The ability of a cultural practice to absorb or adapt to changes and shocks (like social change or climate change) while retaining its core functions and significance. A resilient practice might have flexible techniques or strong community value that keep it going amid adversity.

**S**

**Safeguarding:** Measures aimed at ensuring the viability of intangible cultural heritage, including identification, documentation, research, preservation, protection, promotion, transmission (particularly through formal and informal education), and revitalization of the various aspects of such heritage.

**Safeguarding Plan:** A strategy or set of measures developed to protect and promote a specific ICH element. UNESCO often requires these for elements on their lists, detailing how the community and others will keep the practice viable.

**Safeguarding vs. Freezing:** A concept in heritage management: safeguarding should keep heritage alive and adapting, whereas "freezing" would mean preserving it exactly as it is, which can strip away its dynamic nature. Ethical safeguarding avoids freezing and instead encourages evolution driven by communities.

**Sustainability Transitions:** Fundamental shifts in socio-technical systems (like how we produce energy or food) to more sustainable modes. These typically unfold over decades and involve interactions of technology, culture, policy, and markets.

**T**

**Transition Design / Transition Management:** A planning approach focused on enabling systematic change or transitions in societal systems (energy, food, mobility, etc.) towards sustainability. It involves long-term visioning, experimentation, and iterative learning in a participatory manner. Transition design recognizes complexity and the need for collaboration across stakeholders and sectors.

**Note:**

The glossary definitions are informed by the references in this playbook and standard usage in heritage and transition fields. They are simplified for quick reference.

# Appendix B: References

1. **ICSM CHC White Paper I (2022)** – Intangible Cultural Heritage, Diverse Knowledge Systems and Climate Change. Commissioned for the International Co-Sponsored Meeting on Culture, Heritage, and Climate Change. This paper discusses the importance of integrating intangible heritage and indigenous knowledge in climate responses, and emphasizes principles like FPIC and knowledge co-production. It provides the UNESCO definition of intangible heritage and context on how heritage is reframing towards sustainable development.

2. **UNESCO (2003 & 2015)** – Convention for the Safeguarding of the Intangible Cultural Heritage and Operational Directives, and UNESCO brochure "Intangible Cultural Heritage and Sustainable Development" (2015). These outline concepts of living heritage, the requirement for community involvement in safeguarding, and examples of how intangible heritage contributes to social, economic, environmental sustainability.

3. **GreenHeritage Project Deliverable D2.3 (2023)** – Development of Methodology: Integrating ICH Safeguarding and Climate Adaptation. An EU-funded project report that influenced our methodology section. It covers participatory inventorying, risk assessment for heritage under climate change, and option development. We cited its guidance on inventorying with community consent and using tools like impact chains for assessing risk.

4. **Transcription of ICAG Seminar "Exploring Living Heritage for a Sustainable Future" (2019)** – A seminar focused on heritage-based solutions in water and land management (Flanders/Netherlands). Speakers highlighted seeing heritage as a lever for climate adaptation, the need to valorize traditional knowledge, and gave examples of practices like hedge-laying contributing to ecosystems. We drew from this the notion of heritage offering "heritage-based solutions" and the shift in thinking heritage not as resisting but enabling change.

5. **DRIFT & TOMORROW Project (2016, 2022)** – Transition Management in the Urban Context – Guidance Manual (DRIFT 2016) and TOMORROW H2020 Methodological Guidelines (de Geus et al. 2022). These provided the transition management cycle and the garden metaphor for steps. We cited their emphasis that transition management is about process (planting seeds of change rather than delivering a product) and updating governance to sustain impact. They inspired our S4 approach and the stepwise structure.

6. **Les Jardins d'ici Blog (2024)** – "Wikimedia contest – Living heritage" by E. Leterme. A first-person account of uploading photos of espalier heritage, which provided real-life insight into the practice's benefits (wall protection from frost/rain) and the notion of reviving "lost arboriculture practices". We used this to exemplify microclimate benefits and the personal connection people have to fruit heritage.

7. **Encounter Network (2023)** – Announcement of World Days of the Art of the Espalier. Noted that as of June 2023, the art of espalier is included in France's national intangible heritage list, aiming for broader recognition.

8. **Loorbach, D. (2010) –** Transition Management for Sustainable Development: A Prescriptive, Complexity-Based Governance Framework. (In Governance journal). This academic text provided background on transition management phases and the idea of a participatory "transition arena" with frontrunners. We didn't quote it directly, but its concepts underpin section 3.

9. **UNESCO Operational Directives (Guidance Note on Inventorying, 2021)** – Guidance that inventory processes should involve communities, avoid creating hierarchies or freezing heritage. We referenced these principles in our methodology and ethics discussion.

10. **Case Study: Le Potager du Roi (Versailles)** – Information from espalier.org on the historical royal fruit garden. Illustrated an example of fruit heritage recognized as world heritage, and gave context on maintenance needs and continuity concerns. We used it as a concrete example of living heritage in fruit cultivation.

## Additional References for Further Reading:

- **Kurin, R. (2004).** Safeguarding Intangible Cultural Heritage in the 2003 UNESCO Convention: a critical appraisal. (Provides context on community involvement in safeguarding.)

- **Rotmans, J., Kemp, R., & van Asselt, M. (2001).** More evolution than revolution: transition management in public policy. (Background on transition theory in governance.)

- **ICOMOS & UNESCO (2019).** The Future of Our Pasts: Engaging Cultural Heritage in Climate Action. (Touches on heritage-based climate adaptation strategies, complementing ICSM white paper.)

- **FAO (2018).** Globally Important Agricultural Heritage Systems (GIAHS) toolkit. (For those interested in linking to agricultural heritage programs.)

All web sources were accessed in 2024-2025. The citations in the text (e.g.) refer to specific locations in these documents for verification and deeper exploration. By consulting these references, readers can expand their understanding of both the theoretical framework and practical examples underpinning this playbook.

# Appendix C: Templates