

1. World Heritage Property Data

1.1 - Name of World Heritage Property

Monastery of Alcobaça

1.2 - World Heritage Property Details

State(s) Party(ies)

- Portugal

Type of Property

cultural

Identification Number

505

Year of inscription on the World Heritage List

1989

1.3 - Geographic Information Table

Name	Coordinates (latitude/longitude)	Property (ha)	Buffer zone (ha)	Total (ha)	Inscription year
Monastery of Alcobaça	39.55 / -8.977	0	0	0	1989
Total (ha)			0		

Comment

Property: 2,5 ha; Buffer zone: 39,17 ha

1.4 - Map(s)

Title	Date	Link to source
Monastery of Alcobaça - Map of the inscribed property	13/05/1988	

1.5 - Governmental Institution Responsible for the Property

- Luís Pinho Lopes
Direção-Geral do Património Cultural
Architecte

Comment

Add: Directorate General for Cultural Heritage Nuno Vassallo e Silva, PhD Director General Direção-Geral do Património Cultural Palácio Nacional da Ajuda 1349-021Lisboa Portugal Telephone: +351213614221 Fax: +351213637047 Email: nvsilva@dgpc.pt rectify: Directorate General for Cultural Heritage Luiz de Pinho Lopes Architect Direção-Geral do Património Cultural Palácio Nacional da Ajuda (...)

1.6 - Property Manager / Coordinator, Local Institution / Agency

- Jorge Pereira de Sampaio
General Directorate for Cultural Heritage
Director
Monastery of Alcobaça

Comment

Rectify: Directorate General for Cultural Heritage Monastery of Alcobaça Jorge Pereira de Sampaio Director Mosteiro de Alcobaça 2461-901 Alcobaça Portugal Telephone: +351 262 505 128 Fax: +351 262 505 130 Email: mosteiro.alcobaca@dgpc.pt

1.7 - Web Address of the Property (if existing)

1. [Direcção Geral dos Edifícios e Monumentos Nacionais](#)

Comment

a) Direção-Geral do Património Cultural - www.patrimoniocultural.pt b) Comissão Nacional da UNESCO - www.unescoportugal.mne.pt/ c) Sistema de Informação do Património Cultural - www.monumentos.pt Please remove 1 as it no longer exists.

1.8 - Other designations / Conventions under which the property is protected (if applicable)

Comment

European Cultural Convention (1976); Convention for the Protection of the Architectural Heritage of Europe (1991); Council of Europe Framework Convention on the Value of Cultural Heritage for Society (2009)

2. Statement of Outstanding Universal Value

2.1 - Statement of Outstanding Universal Value / Statement of Significance

Comment

The Statement of Outstanding Universal Value is waiting for Committee approval.

2.2 - The criteria (2005 revised version) under which the property was inscribed

(i)(iv)

2.3 - Attributes expressing the Outstanding Universal Value per criterion

(i) The clarity of the architectural style, the beauty of the material used and the care with which it was built make the Cistercian abbey of Alcobaça a masterpiece of Gothic Cistercian art; (iv) The Monastery of Alcobaça is an outstanding example of a great Cistercian establishment with a unique infrastructure of hydraulic systems and functional buildings.

2.4 - If needed, please provide details of why the Statement of Outstanding Universal Value should be revised

Not applicable

2.5 - Comments, conclusions and / or recommendations related to Statement of Outstanding Universal Value

It awaits approval of the World Heritage Committee

3. Factors Affecting the Property

3.14. Other factor(s)

3.14.1 - Other factor(s)

3.15. Factors Summary Table

3.15.1 - Factors summary table

	Name	Impact	Origin			
3.1	Buildings and Development					
3.1.4	Major visitor accommodation and associated infrastructure	  				
3.7	Local conditions affecting physical fabric					
3.7.2	Relative humidity	   				
3.8	Social/cultural uses of heritage					
3.8.1	Ritual / spiritual / religious and associative uses	  				
3.10	Climate change and severe weather events					
3.10.1	Storms	   				
3.11	Sudden ecological or geological events					
3.11.2	Earthquake	   				
Legend	 Current	 Potential	 Negative	 Positive	 Inside	 Outside

3.16. Assessment of current negative factors

3.16.1 - Assessment of current negative factors

	Spatial scale	Temporal scale	Impact	Management response	Trend	
3.7	Local conditions affecting physical fabric					
3.7.2	Relative humidity	widespread	on-going	significant	low capacity	static

3.17. Comments, conclusions and / or recommendations related to factors affecting the property

3.17.1 - Comments

4. Protection, Management and Monitoring of the Property

4.1. Boundaries and Buffer Zones

4.1.1 - Buffer zone status

There is a buffer zone

4.1.2 - Are the boundaries of the World Heritage property adequate to maintain the property's Outstanding Universal Value?

The boundaries of the World Heritage property **do not limit** the ability to maintain the property's Outstanding Universal Value but they could be improved

4.1.3 - Are the buffer zone(s) of the World Heritage property adequate to maintain the property's Outstanding Universal Value?

The buffer zones of the World Heritage property **are adequate** to maintain the property's Outstanding Universal Value

4.1.4 - Are the boundaries of the World Heritage property known?

The boundaries of the World Heritage property are known by both the management authority and local residents / communities / landowners.

4.1.5 - Are the buffer zones of the World Heritage property known?

The buffer zones of the World Heritage property **are known** by both the management authority and local residents / communities / landowners.

4.1.6 - Comments, conclusions and / or recommendations related to boundaries and buffer zones of the World Heritage property

The Directorate General for Cultural Heritage and the municipality of Alcobaça are conducting studies in order to set up an appropriate buffer zone that will ensure the property's outstanding universal value.

4.2. Protective Measures

4.2.1 - Protective designation (legal, regulatory, contractual, planning, institutional and / or traditional)

Periodic Reporting Cycle 1 (2001-2006) Section 2

Source: [Periodic Reporting Cycle 1 \(2001-2006\)](#)

Submitted on Monday, November 7, 2005

• Question 6.02

“Regulamento do Plano Director Municipal” (Règlement du Plan Directeur Municipal): l'on trouve des chapitres spécifiquement concernant le patrimoine classé, la protection du patrimoine (altération des bâtiments et des matériaux, etc.) ; - “ Resolução de Conselho de Ministros nº 136/95, de 11 de Novembro “ (Résolution du Conseil de

Ministres nº 136/95, du 11 novembre); “ Lei de Bases do Património Cultural” (Loi de base du Patrimoine Culturel): elle contrôle notamment les altérations introduites dans les bâtiments classés, aussi bien que les fouilles archéologiques quand elles sont nécessaires, etc. “ Lei nº 107/2001, de 08 de Setembro” (Loi nº 107/2001, du 8 septembre); Zones de protection du patrimoine architectural “ DG 223, de 23 de Setembro de 1967; DR 268, de 19 de Novembro de 1977” (J. O. 223, du 23 septembre 1967 ; J.O. 268, du 19 novembre 1977).

4.2.2 - Is the legal framework (i.e. legislation and / or regulation) adequate for maintaining the Outstanding Universal Value including conditions of Integrity and / or Authenticity of the property?

The legal framework for the maintenance of the Outstanding Universal Value including conditions of Authenticity and / or Integrity of the World Heritage property provides **an adequate or better basis** for effective management and protection

4.2.3 - Is the legal framework (i.e. legislation and / or regulation) adequate in the buffer zone for maintaining the Outstanding Universal Value including conditions of Integrity and / or Authenticity of the property?

The legal framework for the maintenance of the Outstanding Universal Value including conditions of Authenticity and / or Integrity of the World Heritage property provides **an adequate or better basis** for effective management and protection

4.2.4 - Is the legal framework (i.e. legislation and / or regulation) adequate in the area surrounding the World Heritage property and buffer zone for maintaining the Outstanding Universal Value including conditions of Integrity and / or Authenticity of the property?

The legal framework for the area surrounding the World Heritage property and the buffer zone provides **an adequate or better basis** for effective management and protection of the property, contributing to the maintenance of its Outstanding Universal Value including conditions of Authenticity and / or Integrity

4.2.5 - Can the legislative framework (i.e. legislation and / or regulation) be enforced?

There is **excellent** capacity / resources to enforce legislation and / or regulation in the World Heritage property

4.2.6 - Comments, conclusions and / or recommendations related to protective measures

The Directorate General for Cultural Heritage is working with the municipality of Alcobaça in order to adopt appropriate protective measures particularly affecting the urban setting.

4.3. Management System / Management Plan

4.3.1 - Management System

Periodic Reporting Cycle 1 (2001-2006) Section 2

Source: [Periodic Reporting Cycle 1 \(2001-2006\)](#)

Submitted on Monday, November 7, 2005

• Question 5.05

Overall management system of the site

- Management by the State Party

4.3.2 - Management Documents

4.3.3 - How well do the various levels of administration (i.e. national / federal; regional / provincial / state; local / municipal etc.) coordinate in the management of the World Heritage Property ?

There is **excellent coordination** between all bodies / levels involved in the management of the property

4.3.4 - Is the management system / plan adequate to maintain the property's Outstanding Universal Value ?

The management system/plan is only **partially adequate** to maintain the property's Outstanding Universal Value

4.3.5 - Is the management system being implemented?

The management system is **only partially** being implemented

4.3.6 - Is there an annual work / action plan and is it being implemented?

An annual work / action plan exists and **many activities** are being implemented

4.3.7 - Please rate the cooperation / relationship with World Heritage property managers / coordinators / staff of the following

Local communities / residents	Good
Local / Municipal authorities	Good
Indigenous peoples	Not applicable
Landowners	Fair
Visitors	Good
Researchers	Good
Tourism industry	Good
Industry	Good

4.3.8 - If present, do local communities resident in or near the World Heritage property and / or buffer zone have input in management decisions that maintain the Outstanding Universal Value?

Local communities have **some input** into discussions relating to management but no direct role in management

4.3.9 - If present, do indigenous peoples resident in or regularly using the World Heritage property and / or buffer zone have input in management decisions that maintain the Outstanding Universal Value?

No indigenous peoples are resident in or regularly using the World Heritage property and / or buffer zone

4.3.10 - Is there cooperation with industry (i.e. forestry, mining, agriculture, etc.) regarding the management of the World Heritage property, buffer zone and / or area surrounding the World Heritage property and buffer zone?

There is contact but only **some cooperation** with industry regarding the management of the World Heritage property, buffer zone and / or area surrounding the World Heritage property and buffer zone

4.3.11 - Comments, conclusions and / or recommendations related to human resources, expertise and training

The Directorate General for Cultural Heritage develops continuous training programmes for its human resources and encourages external training.

4.3.12 - Please report any significant changes in the legal status and / or contractual / traditional protective measures and management arrangements for the World Heritage property since inscription or the last Periodic report

No significant changes have been reported.

4.4. Financial and Human Resources

4.4.1 - Costs related to conservation, based on the average of last five years (relative percentage of the funding sources)

Multilateral funding (GEF, World Bank, etc)	
International donations (NGO's, foundations, etc)	
Governmental (National / Federal)	15%
Governmental (Regional / Provincial / State)	
Governmental (Local / Municipal)	
In country donations (NGO's, foundations, etc)	
Individual visitor charges (e.g. entry, parking, camping fees, etc.)	
Commercial operator payments (e.g. filming permit, concessions, etc.)	
Other grants	85%

4.4.2 - International Assistance received from the World Heritage Fund (USD)

4.4.3 - Is the current budget sufficient to manage the World Heritage property effectively?

The available budget is **acceptable** but could be further improved to fully meet the management needs

4.4.4 - Are the existing sources of funding secure and likely to remain so?

The existing sources of funding **are secure** in the medium-term and planning is underway to secure funding in the long-term

4.4.5 - Does the World Heritage property provide economic benefits to local communities (e.g. income, employment)?

There is **some flow** of economic benefits to local communities

4.4.6 - Are available resources such as equipment, facilities and infrastructure sufficient to meet management needs?

There are **adequate** equipment and facilities

4.4.7 - Are resources such as equipment, facilities and infrastructure adequately maintained?

There is **basic** maintenance of equipment and facilities

4.4.8 - Comments, conclusion, and / or recommendations related to finance and infrastructure

The Directorate General for Cultural Heritage keeps on working to diversify its sources of funding by generating

greater capital inflows and gradually improving infrastructure conditions.

4.4.9 - Distribution of employees involved in managing the World Heritage property (% of total)

Full-time	88%
Part-time	12%

4.4.10 - Distribution of employees involved in managing the World Heritage property (% of total)

Permanent	80%
Seasonal	20%

4.4.11 - Distribution of employees involved in managing the World Heritage property (% of total)

Paid	100%
Volunteer	0%

4.4.12 - Are available human resources adequate to manage the World Heritage property?

A range of human resources exist, but these are **below optimum** to manage the World Heritage Property.

4.4.13 - Considering the management needs of the World Heritage property, please rate the availability of professionals in the following disciplines

Research and monitoring	Good
Promotion	Poor
Community outreach	Fair
Interpretation	Good
Education	Fair
Visitor management	Fair
Conservation	Poor
Administration	Good
Risk preparedness	Fair
Tourism	Fair
Enforcement (custodians, police)	Poor

4.4.14 - Please rate the availability of training opportunities for the management of the World Heritage property in the following disciplines

Research and monitoring	High
Promotion	Medium
Community outreach	Medium
Interpretation	High
Education	High
Visitor management	Medium
Conservation	High
Administration	High
Risk preparedness	Medium
Tourism	High
Enforcement (custodians, police)	Medium

4.4.15 - Do the management and conservation programmes at the World Heritage property help develop local expertise?

A capacity development plan or programme is in place and **partially implemented**; some technical skills are being transferred to those managing the property locally **but most of the technical work is carried out by external staff**

4.4.16 - Comments, conclusions and / or recommendations related to human resources, expertise and training

4.5. Scientific Studies and Research Projects

4.5.1 - Is there adequate knowledge (scientific or traditional) about the values of the World Heritage property to support planning, management and decision-making to ensure that Outstanding Universal Value is maintained?

Knowledge about the values of the World Heritage property is **sufficient** for most key areas **but there are gaps**

4.5.2 - Is there a planned programme of research at the property which is directed towards management needs and / or improving understanding of Outstanding Universal Value?

There is **considerable** research but it is **not directed** towards management needs and / or improving understanding of Outstanding Universal Value

4.5.3 - Are results from research programmes disseminated?

Research results are **shared with local participants and some national agencies**

4.5.4 - Please provide details (i.e. authors, title, and web link) of papers published about the World Heritage property since the last Periodic Report

Guidebook edited by Scalapublishers/DGPC, large and small format, Portuguese and English – author Jorge Rodrigues; Information leaflet with floor plans.

4.5.5 - Comments, conclusions and / or recommendations related to scientific studies and research projects

The Directorate General for Cultural Heritage promotes a number of scientific studies and conducts research projects contributing to furthering knowledge about the property.

4.6. Education, Information and Awareness Building

4.6.1 - At how many locations is the World Heritage emblem displayed at the property?

In **many locations**, but **not easily visible** to visitors

4.6.2 - Please rate the awareness and understanding of the existence and justification for inscription of the World Heritage property amongst the following groups

Local communities / residents	Average
Local / Municipal authorities within or adjacent to the property	Average
Local Indigenous peoples	Not applicable
Local landowners	Average
Visitors	Average
Tourism industry	Average
Local businesses and industries	Average

4.6.3 - Is there a planned education and awareness programme linked to the values and management of the World Heritage property?

There is a planned education and awareness programme but it only **partly meets the needs** and could be improved

4.6.4 - What role, if any, has designation as a World Heritage property played with respect to education, information and awareness building activities?

World Heritage status has influenced education, information and awareness building activities, **but it could be improved**

4.6.5 - How well is the information on Outstanding Universal Value of the property presented and interpreted?

The Outstanding Universal Value of the property is adequately presented and interpreted **but improvements could be made**

4.6.6 - Please rate the adequacy for education, information and awareness building of the following visitor facilities and services at the World Heritage property

Visitor centre	Adequate
Site museum	Adequate
Information booths	Adequate
Guided tours	Adequate
Trails / routes	Adequate
Information materials	Adequate
Transportation facilities	Poor
Other	Not needed

4.6.7 - Comments, conclusions and / or recommendations related to education, information and awareness building

The services of the Monastery of Alcobaça have been pursuing their efforts to further knowledge about the property through education activities, temporary exhibitions, guided visits and dissemination of activities on a digital platform.

4.7. Visitor Management

4.7.1 - Please provide the trend in annual visitation for the last five years

Last year	Decreasing
Two years ago	Minor Increase
Three years ago	Decreasing
Four years ago	Decreasing
Five years ago	Minor Increase

4.7.2 - What information sources are used to collect trend data on visitor statistics?

Entry tickets and registries

4.7.3 - Visitor management documents

4.7.4 - Is there an appropriate visitor use management plan (e.g. specific plan) for the World Heritage property which ensures that its Outstanding Universal Value is maintained?

Visitor use of the World Heritage property is managed but **improvements could be made**

4.7.5 - Does the tourism industry contribute to improving visitor experiences and maintaining the values of the World Heritage property?

There is **excellent co-operation** between those responsible for the World Heritage property and the tourism industry to present the Outstanding Universal Value and increase appreciation

4.7.6 - If fees (i.e. entry charges, permits) are collected, do they contribute to the management of the World Heritage property?

The fee is collected and makes a **substantial contribution** to the management of the World Heritage property

4.7.7 - Comments, conclusions and / or recommendations related to visitor use of the World Heritage property

The Directorate General for Cultural Heritage has a number of action programmes targeted exclusively at visitors of the World Heritage site.

4.8. Monitoring

4.8.1 - Is there a monitoring programme at the property which is directed towards management needs and / or improving understanding of Outstanding Universal Value?

There is a **comprehensive, integrated programme** of monitoring, which is relevant to management needs and / or improving understanding of Outstanding Universal Value

4.8.2 - Are key indicators for measuring the state of conservation used to monitor how the Outstanding Universal Value of the property is maintained?

Information on the values of the World Heritage property is **sufficient** for defining and monitoring key indicators for measuring its state of conservation

4.8.3 - Please rate the level of involvement in monitoring of the following groups

World Heritage managers / coordinators and staff	Excellent
Local / Municipal authorities	Average
Local communities	Poor
Researchers	Average
NGOs	Not applicable
Industry	Non-existent
Local indigenous peoples	Not applicable

4.8.4 - Has the State Party implemented relevant recommendations arising from the World Heritage Committee?

Implementation is **underway**

4.8.5 - Please provide comments relevant to the implementation of recommendations from the World Heritage Committee

Implementation of the World Heritage Committee recommendations is underway.

4.8.6 - Comments, conclusions and / or recommendations related to monitoring

Efforts are being made to improve monitoring conditions of the site.

4.9. Identification of Priority Management Needs

4.9.1 - Please select the top 6 managements needs for the property (if more than 6 are listed below)

Please refer to question 5.2

5. Summary and Conclusions

5.1. Summary - Factors affecting the Property

5.1.1 - Summary - Factors affecting the Property

	World Heritage criteria and attributes affected	Actions	Monitoring	Timeframe	Lead agency (and others involved)	More info / comment	
3.7	Local conditions affecting physical fabric						
3.7.2	Relative humidity	There is no direct relation between humidity conditions affecting certain areas of the building and the values underlying OUV criteria.	Combating humidity is a daily routine requiring dehumidifiers and air conditioning when the values are excessive.	Monitoring humidity and temperature values are daily routines requiring measuring instruments.	This will take around ten years.	The building's own services with assistance from the Department of Projects and Works of the Directorate General for Cultural Heritage.	Humidity is particularly serious next to the church.

5.2. Summary - Management Needs

5.2.2 - Summary - Management Needs

4.1 Boundaries and Buffer Zones						
		Actions	Timeframe	Lead agency (and others involved)	More info / comment	
4.1.2	Boundaries could be improved	Studies to create a buffer zone so as to ensure the outstanding universal values of the property are well underway.	Two years	Directorate General for Cultural Heritage and Alcobaça City Council.	No comment	

5.3. Conclusions on the State of Conservation of the Property

5.3.1 - Current state of Authenticity

The authenticity of the World Heritage property has been **preserved**

5.3.2 - Current state of Integrity

The integrity of the World Heritage property is **intact**

5.3.3 - Current state of the World Heritage property's Outstanding Universal Value

The World Heritage property's Outstanding Universal Value has been **maintained**.

5.3.4 - Current state of the property's other values

Other important cultural and / or natural values and the state of conservation of the World Heritage property are **predominantly intact**

5.4. Additional comments on the State of Conservation of the Property

5.4.1 - Comments

Works are underway to improve the state of conservation of the property. A number of conservation and restoration works have been completed in different areas of the property including the roofs.

6. World Heritage Status and Conclusions on Periodic Reporting Exercise

6.1 - Please rate the impacts of World Heritage status of the property in relation to the following areas

Conservation	Very positive
Research and monitoring	Positive
Management effectiveness	Positive
Quality of life for local communities and indigenous peoples	Positive
Recognition	Positive
Education	Positive
Infrastructure development	Very positive
Funding for the property	Positive
International cooperation	Very positive
Political support for conservation	Very positive
Legal / Policy framework	Very positive
Lobbying	Not applicable
Institutional coordination	Positive
Security	Positive
Other (please specify)	Not applicable

6.2 - Comments, conclusions and / or recommendations related to World Heritage status

Management, maintenance, conservation, study and dissemination of information about the inscribed property require permanent action and constant updating of information and resources available. In order to face these challenges, all the interested parties have to get involved and pool their efforts to ensure that the World Heritage status is maintained.

6.3 - Entities involved in the preparation of this Section of the Periodic Report

Governmental institution responsible for the property
Site Manager/Coordinator/World Heritage property staff
Staff from other World Heritage properties

6.4 - Was the Periodic Reporting questionnaire easy to use and clearly understandable?

yes

6.5 - Please provide suggestions for improvement of the Periodic Reporting questionnaire

6.6 - Please rate the level of support for completing the Periodic Report questionnaire from the following entities

UNESCO	Very good
State Party Representative	Very good
Advisory Body	Good

6.7 - How accessible was the information required to complete the Periodic Report?

Most of the required information was accessible

6.8 - The Periodic Reporting process has improved the understanding of the following

The World Heritage Convention
The property's Integrity and / or Authenticity
Managing the property to maintain the Outstanding Universal Value
Monitoring and reporting
Management effectiveness

6.9 - Please rate the follow-up to conclusions and recommendations from previous Periodic Reporting exercise by the following entities

UNESCO	Satisfactory
State Party	Satisfactory
Site Managers	Satisfactory
Advisory Bodies	Not Applicable

6.10 - Summary of actions that will require formal consideration by the World Heritage Committee

- **Statement of Outstanding Universal Value / Statement of Significance**
Reason for update: The Statement of Outstanding Universal Value is waiting for Committee approval.
- **Geographic Information Table**
Reason for update: Property: 2,5 ha; Buffer zone: 39,17 ha

6.11 - Comments, conclusions and / or recommendations related to the Assessment of the Periodic Reporting exercise

No comment