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Ismail Serageldin - April 3, 1998

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THE WORLD BANK

Washington, D.C.

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Telephone: 202-473-1000 Internet: www.worldbank.org

Meeting: Mr. Ismail Serageldin

Friday, April 3, 1998 6:00 - 6:30 p.m. JDW Office

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A. CLASSIFICATION			
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E. COMMENTS:		W V	32

The World Bank

MARISELA MONTOLIU MUÑOZ Assistant to the President

April 2, 1998

Mr. Serageldin has indicated that no briefing will be needed for this session which, as you had agreed, would focus on the role and objectives of Mr. Serageldin's new unit. However, we thought that the attached recent correspondence would be of interest to you.

Marisela Montoliu



11th March 1998

Dear Fin,

Here is another letter for you to endure! This time it is about the unique Saxon villages and fortified churches of Transylvania. I enclose a small booklet produced by the Mihai Eminescu Trust which describes the whole problem very graphically. All I can do at present is to send a donation to the Trust, but the overriding problem at present seems to be the inevitable desire on the part of the locals to modernize their houses and, in the process, destroy almost perfect five centuries-old villages. The Trust see the only answer to this as being the introduction of a new Historic Monuments Law, but I daresay it might be possible to devise some kind of imaginative solution which would allow modernization without destruction. Do you think the World Bank would ever be able to look into this problem, together with the E.U. and Romanian authorities? I only wish you and I could go on a short tour of some of these villages and see if it was possible to protect this magical part of Eastern Europe before it is all too late...

long, as every

Marly



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JAMES D. WOLFENSOHN President

March 30, 1998

Mr. Ismail Serageldin Room No. MC 4-123 The World Bank

Dear Ismail,

Could you take an immediate look at this note from Prince Charles together with the attached booklet? It does seem to me that if we talk to the Romanian authorities about cultural preservation, we might be able to give this particular project some support. Let me know what you think.

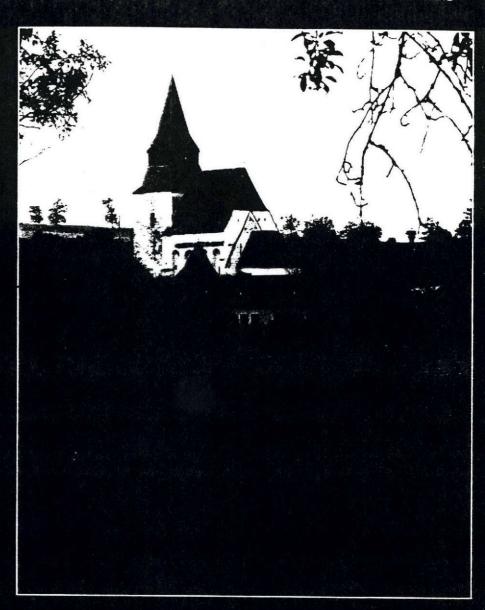
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James D. Wolfensohn

Attachments

his talk an room on your of con one of will took it up immediately

THE PLIGHT OF THE SAXONS OF TRANSYLVANIA AND THEIR FORTIFIED CHURCHES



By William Blacker

The Plight of the Saxons of Transylvania and their Fortified Churches

by

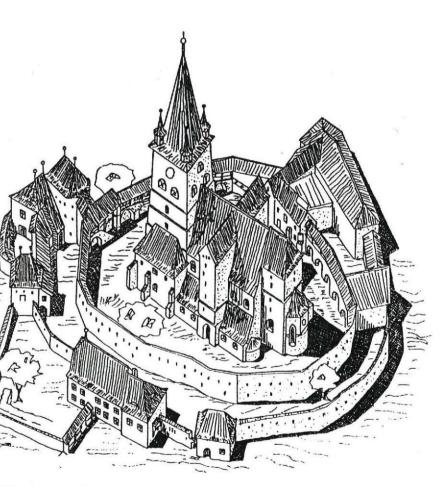
William Blacker

"And I must not omit to say
That in Transylvania there's a tribe
Of alien people that ascribe
The outlandish ways and dress
On which their neighbours lay such stress,
To their fathers and mothers having risen
From some subterraneous prison
Into which they were trepanned
Long time ago in a mighty band
Out of Hamelin town in Brunswick land,
But how or why they don't understand."

Robert Browning - The Pied Piper of Hamelin.

Front Cover photograph: The Fortified Church and village of Roades. (Dr. Herman Fabini)

The Mihai Eminescu Trust



the Fortress Church at Heltau

During the last six years a unique civilisation has been rapidly fading away in Eastern Europe. Since 1990 the Saxon community of Transylvania has dwindled and now faces a struggle for survival. But even though the people have emigrated their monuments remain. Transylvania is dotted with more than two hundred Saxon fortified churches dating from between the 14th and 16th centuries. Magnificent buildings and their contents are at risk.



Siebenbürgen



ted panel from the gallery at Radeln (Roades).

the year 1143 a group of "Saxons" (1), who, it is believed, came from around Luxembourg, the Mosel and the Lower Rhinelands, travelled from Northern Europe to settle in Southern Transylvania. In return for special privileges and near autonomy granted to them by King Geza II of Hungary they had agreed to colonise and guard the southern borders of the Hungarian Kingdom. In the green and rolling countryside just to the north of the southern Carpathian mountains they prospered and their towns (2) and villages spread across an area the size of Kent, Surrey, Sussex and Hampshire. There, although islanded for centuries amongst Hungarians and Roumanians and subject to repeated raids from Turks and Tartars they resolutely defended themselves and their old way of life and traditions against all encroachments; so much so that they never lost their distinctive "Saxonness" and continue still to speak their old Northern European dialect. As a result, despite being very much in South-Eastern Europe, almost the Balkans, the Saxon lands have more of a feel of Southern England about them. Walking across the wooded hills between the villages one is guided by the tall towers and steeples of their old gothic churches, and the hymns sung in those churches are all familiar. When I tell them that I come from England they say: "Ah, a Saxon, just like us."

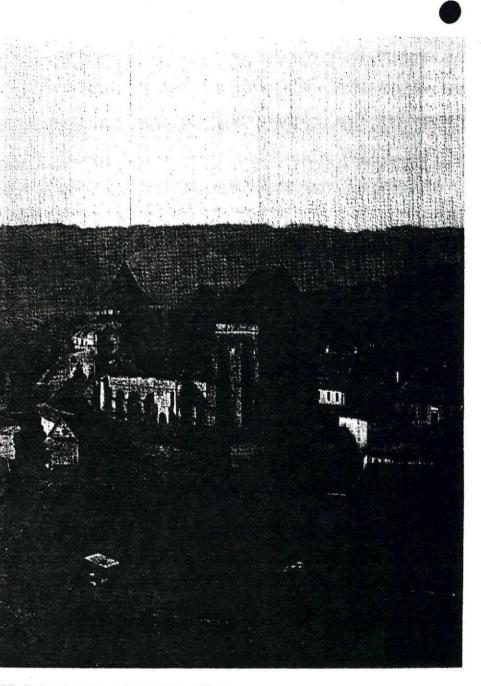
However, in 1990, after the fall of the Berlin Wall, due to a law dating from the time of the Kaiser Wilhelm II which granted German citizenship to anyone who could demonstrate German ancestry (3), the vast majority of Saxons decided to lay down their scythes, sell their horses, carts, ploughs and old traditional costumes and return to Northern Europe 850 years after their ancestors first departed from there. It has in effect taken just a couple of years to destroy a community whose way of life endured little changed in this remote corner of Europe since less than one hundred years after the Norman conquest of England.

In some villages there are now no Saxons left. In others just a few elderly people remain valiantly looking after the church, still ringing the bells and winding up the clock. The Saxons were said by legend to be the descendants of the children led through the mountain from Hamelin town to Transylvania by the Pied Piper. Today that legend has been uncannily reversed: almost all the young have now left Transylvania and only a few old people remain sitting out on benches in the sun in their old peasant clothes watching bemused the changing scene. When asked where everyone else has gone they reply sadly: "They have all left". And will they go too?: "We do not want to go, this is our homeland," they say, "but if we stay, who will bury us?"

¹⁾ Why they were called "Saxons" is not entirely clear as all authorities agree that they did not come from Saxony. Possibly the word "Saxon" in 13th century Hungary simply referred to anyone who came from Northern Europe.

²⁾ The area they settled became known as 'Siebenbürgen' after the seven main towns they established.

³⁾ The Saxons could not actually prove German ancestry but were given the benefit of the doubt.



ified Church at Wurmloch (Valea Viilor).

Siebenbürgen, as late as 1990, in the summer the fields were full of Saxons in thei broad-brimmed straw hats scything the grass and loading up carts with hay. In the evening in the villages the yards would be full of noise and activity, the horses and carts returning the pigs being fed. Everywhere could be heard the Saxon language. Their life was very traditional and old fashioned; sometimes the people, their clothes, almost every detail seemed to come out of a painting by Breughel or one of the Flemish old masters.

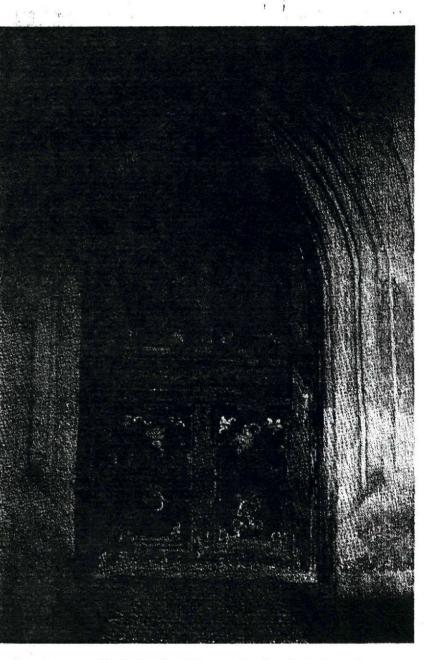
Nowadays the noise and the children tend to be Gypsy. Before 1990 the average Saxor village was composed of approximately 70% Saxons, 25% Roumanians, and 5% Gypsies Now just a few years on the statistics read more as 5% Saxons, 40%Roumanians and 55% Gypsies.

The Saxon villages are some of the most beautiful and unspoilt in Roumania. There are almost no modern buildings. The streets are more often than not untarmaced, dusty in summer, mud in winter, with ducks, geese and cows wandering about freely. In the centre looms a vast mediaeval fortified church around which stand the solid Saxon houses washed in blue, green or golden ochre yellow, with steep hipped rooves and old decorative plasterwork.

In some villages where there are now no Saxons left, or only a very few, many of the fine old houses are vandalised and falling into ruin. The churches, with their tall defensive walls and towers, as the village strongholds protected generations of Saxons for hundreds of years from marauding invaders and jealous neighbours; but now there are almost no Saxons left to defend them and it will not take an army to breach their walls. Their fate now, unless something can be done to help them, is to become merely a useful source of free firewood and building materials for the remaining local people. A few have already gone that way.

The Fortified Churches.

In the Middle Ages Transylvania's position between East and West meant turbulent times. One hundred years after first arriving there, in 1241 the Saxon's settlements were devastated during the Mongol invasion of Batu Khan. Then in the 15th, century the Turks raided Transylvania fifteen times. It was in response to attacks like these that the village churches were fortified. From then on they remained in readiness. Within the walls each village family had a small room in which they lived in times of siege, and the family's provisions were always kept inside the fortress in case of sudden attack. Today the few Saxons who remain still keep their hams in the 'Speckturm' hanging from ancient rusty hooks and carefully labelled with the owners name and house number. There are no weapons left now, though in the 1850's the English traveller Charles Boner saw swords and spears, and even a huge drum to warn villagers of approaching trouble, still hanging ready in the fortress at Keisd. Only sixty years before in 1788 the last Turkish invasion of Transylvania had taken place.



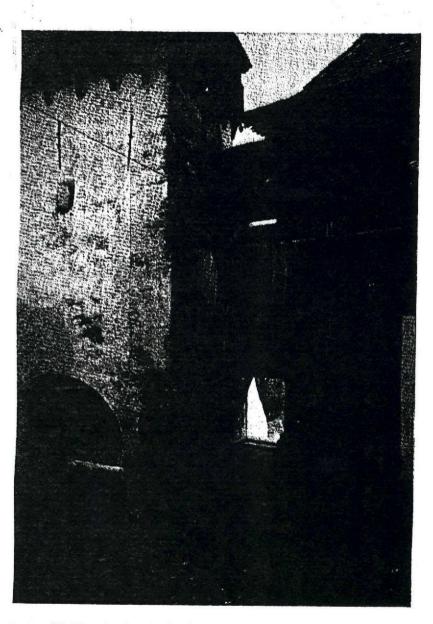
te Burg ist unser Gott". A painted door at the church of Stolzenburg

ght up until today in fact, unlike castles in Britain that have either fallen into ruin or been progressively modernised, the fortified churches have been maintained almost in their original condition by generations of Saxon tilers, joiners and smiths and remain mediaeva fortresses still ready to repel an attack. The wooden galleries and rickety old ladders that the Saxons used to reach the battlements survive; even the wooden flaps of the arrow slite that swivel open and shut on firing and loading are still there.

Each village administered its own affairs as small efficiently-functioning peasant democracies and thus the fortresses were built entirely by the villagers themselves; they were not the creations of feudal barons. Nonetheless the fortifications are very serious and sophisticated, if unusual, examples of military architecture. Around the church itself there are sometimes two or even three concentric encircling and bastioned walls filled with all the gun- and arrow-slits pointing in every direction, shutes for pouring down boiling oil and portcullises you would expect (and many you would not). Of them Patrick Leigh Fermon wrote: "These defensive rings are amazing, even in a border region that bristles with castles.....they are as full of purposes as bits of armour." Even the upper storey of the church above the nave and the church's tower are brimming with defensive mechanisms. In the 16th, century the Saxons became Lutherans; often you can see painted or carved on the church door the first line of Luther's famous hymn: "Ein' Feste Burg ist unser Gott" - being on the front line of defence of Western Christendom, for the Saxons these lines were more than metaphorical.

Surprisingly perhaps the interiors of the churches are charmingly decorated and peaceful places, quite at odds with their warlike surroundings. The galleries and side pews are prettily painted with simple designs of flowers, trees, birds or primitive views of villages. No bright modern restorations offend the eye. The central pews and floorboards are of well-worn pine, polished with centuries of use. Over the altar there is often a fine Renaissance carved and painted many-panelled altarpiece, the sort that are sadly nowadays more usually seen in museums. Up above the vaults and the windows are Gothic.

However, today, so many people having departed, some of the churches are not used at all even though there may be still a few old Saxons left living in the village. At others there is a service perhaps only once every three weeks and then the church is almost empty; six years ago it would have been full and each person, depending on whether they were a boy or a girl, married or unmarried, middle-aged or village elders, had their allotted place.



steps and ladders lead to the battlements at Deutschweisskirch (Viscri).

be following statistics speak for themselves: in the village of Archita there were 235 Saxons in January 1990.

December 1990. December 1991. September 1994. September 1995. January 1990. In the village of Roades there were 200 Saxons in June 1990. June 1991.

> September 1995. 28 September 1996.

These figures are much the same for all villages of Siebenbürgen.

30

Overall in 1990 there were 90,000 Saxons in Transylvania. Now there are less than 20,00

In 1990 there were apprx. 250 parsons. Now there are 43.

Previously every village had a school. Now there are only two Saxon village school remaining.

The departure of the Saxons after the borders opened in 1990 was precipitate, most of the going within the first year at a rate of almost a thousand a week. The difference betwee the standard of living in Germany and Roumania made it hard for many of them to res emigrating, especially as all their young were being lured away by the modern day Pi Piper wearing blue jeans, drinking Coca-Cola and playing the electric guitar. But for other it took more than this to persuade them to up and abandon their 850-year history Transylvania. The stronger reasons have been maturing throughout this century. The Sax culture is in reality one of the later casualties of the 2nd. World War.

Like the Roumanians the Saxons fought on the German side. Roumania had joined the A in 1940 seeing no point in useless resistance after the fall of Poland and France and af Bessarabia and Northern Transylvania had already been annexed by the USSR, but chang sides in 1944, at the first real opportunity, just before the Russian army entered the country. Immediately after the war, in 1945, the Russians demanded human labour reparations and the Roumanian police, perhaps justifiably scapegoating the ethnic Germa who had been the most enthusiastic supporters of Hitler, rounded up all Saxons betwee the ages of 18 and 50 or 35, depending whether they were men or women, and deliver them into the hands of the Russians who deported them to the Soviet Union for hard labo Many mothers were separated from their young children. At the same time all Saxon lan and houses were confiscated and given to Roumanians and Gypsies (Saxons havi nowhere to live often had to lodge with whichever Roumanian or Gypsy family would ta them in).

A couple of years later all land was in any case collectivized when the Communists over. From then on for the next 40 years the Saxons, like everyone else, had to live under the Communist Dictatorships of Dej and Ceausescu, during which time their self-sufficiency and individuality as Saxons was not appreciated. When in the 1970's Helmut Schmidt came to an agreement with Ceausescu to buy exit visas for ethnic Germans (each costing around 5000 DM) there were many Saxons who were only too happy to get out. Though convenient for some it began a psychology of emigration that had not existed before.

So in 1990 when the borders opened, aware of the possibility, the trickle of emigrants became a flood. The previous 50 years had proved so difficult for the Saxons that most were not even interested to see if things would improve. Those who remained, hoping for better days, were disillusioned. They still felt themselves to be "foreigners" in their own homeland. They protested, for example, that in the redistribution of lands they were not given their old ground back but only the most infertile and distant from the village. They gave up hope and left too.

There remains therefore in the villages just a handful of old Saxons doing their best to look after the churches and their precious contents. As they grow older and fewer the job becomes always more difficult. Some are still leaving for Germany and the Saxon population is now dropping by 10% every year. Vital maintenance work which previously would have been carried out by the community is left undone for lack of money and manpower. Tiles are slipping, rain is coming in and plaster is discolouring and falling off.



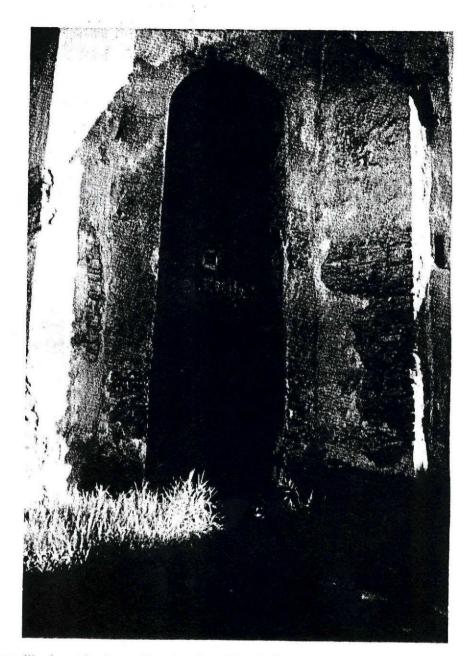
The Fortified Church at Hundertbücheln (Movile).



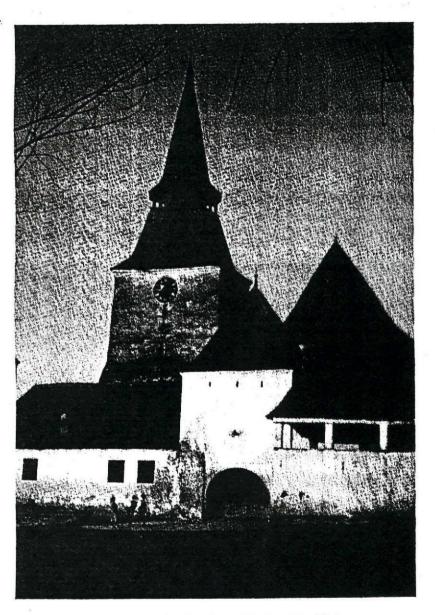
peckkammer at Meschen (Mosna).



the painted gallery at Klosdorf (Cloasterf).



Portcullis above the door of the church at Wurmloch (Valea Villor).



children playing in front of the church at Arkeden (Archita).

nita / Arkeden.

It was in the 12th. century that Saxons first came to the valley that they named Arkeden (now in Roumanian - Archita) and established a settlement there. 800 years on in 1990 there were still 235 Saxons living there, descendants of the original settlers. However, by 1994 there were only two left, Anna Broos and her son Kurt; everyone else had upped and emigrated, including the parson. After 1990 as more and more people left the pressure on Anna and Kurt to abandon everything and go to Germany as well increased, but Anna could not bear to leave the church to it's fate, nor could she bear to leave her home. By 1994 they were alone.

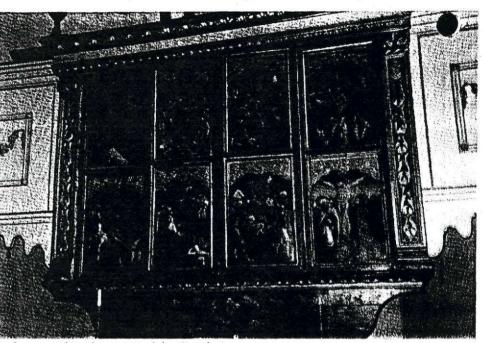
By themselves Anna and Kurt did their best to look after the church. Anna swept and dusted, weeded the paths and the flower-beds; Kurt carried out what repairs he could. Even though there were no other Saxons in Arkeden Kurt would ring the bells every morning and evening as they had always been rung. When the church clock, which also tolled the bells on the hour, stopped working they paid out of their own pocket to have it mended; there was no one else to contribute.

They soldiered on but gradually life became unbearably lonely for them. Most of the other people in the village were now Gypsies who had moved into the houses left empty by departing Saxons, Although the Gypsies never did them any harm Anna and Kurt felt isolated and even at times frightened. Eventually, though it was the last thing they wanted to do they applied for German citizenship, which they were granted. Little did Kurt know when he went to fight alongside other Roumanians in the streets of Bucharest in December 1989 to depose Ceausescu that this would also spell the end for the Saxons in Arkeden.

One April morning in 1995 Anna and Kurt, Anna with tears rolling down her cheeks, rang the bell and wound the clock for the last time, and taking with them only what they could carry, departed from Arkeden for ever, leaving the village Saxonless for the first time in over 800 years.

Now the imposing fortress-church that they had so lovingly cared for must fend for itself; it is already looking dilapidated. Weeds that were never allowed there before are growing half way up the tower. Inside the church piles of gothic script hymn books, church banners, the embroidered altar-cloth and the extraordinary Baroque altarpiece itself are covered in dust. There is a large patch of damp on one of the transept walls where the rain is coming in. The church which has survived perfectly intact since the 14th. century is deteriorating rapidly.

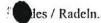
Meanwhile, the last Saxon guardians of the church have arrived in Germany and are living together in one tiny room of a refugee hostel. They look very out of place even though they are no longer wearing their Transylvanian clothes. They do not like to talk of their old home or of the church which now stands as a silent memorial to the 850 year Saxon sojourn in the valley of Arkeden. The bells have not rung since they left and the clock that they mended quietly stopped the day after they their departure.



naissance altarpiece at Radeln (Roades).



d Frau Knall of Radeln (Roades).



In the nearby village of Radeln (Roades in Roumanian) there are 28 Saxons remaining, most of them over 70. Their church has an especially beautiful painted interior and an important twelve-panelled Renaissance altarpiece made in the 1530's in the workshop of the master of Schässburg (1), a pupil of Johann Stoss. Now, as in the other Saxon villages, most of the inhabitants of Radeln are Gypsies.

Recently the authorities have been trying to take away the altarpiece saying that it is no longer safe for it in the church, but the Saxons for whom it is the very heart of their village, resolutely refuse to let them take it. For the meantime it remains in the church, at least while there are still Saxons to protect it. In 1991 they had thought of putting some form of alarm system into the church, but as yet they have not saved up enough money to afford one. Just outside the walls the Saxon's little village theatre has been broken into and vandalized. Some of the set of the last play they put on there remains, broken and in tatters.

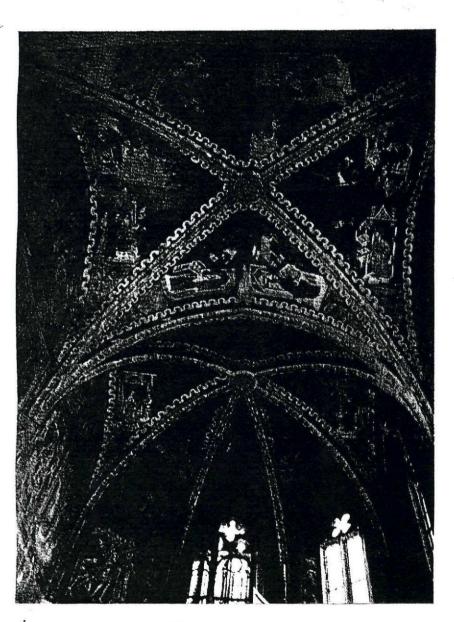
One of the Saxons is Katerina Knall. In 1946 she was deported to Russia. The journey took two weeks in the back of a cattle truck in the middle of January. There she worked for five years breaking stones to resurface streets and repairing war damage. In Russia many Saxons died but she survived, though on returning to Radeln she found that all Saxon property had been confiscated by the Roumanian government. For the next 40 years she lived under Communist rule. Life has not been easy but she and her husband will not leave Radeln. Saxons about to depart for Germany asked her why she did not emigrate as well: "You'll be alone if you stay here" they said. Katerina Knall replied, pointing to the graveyard, "It is not me who will be alone but you; here we have all our forefathers".

Another of the Saxons, Sara Dörner (2), was born in 1911 when Transylvania was still a part of Hungary. Her father was killed in the 1st. World War. She has lived in Radeln all her life and has never travelled further than the local market town. Her husband died in 1991 and her son has gone to Germany. She refused to leave her home and homeland and so remains living by herself.

Katerina Knall, Sara Dörner and the few other remaining Saxons look after each other and the church; it is not easy but they do the best they can. "It is all over for the Saxons here" says Sara Dörner, "but we keep going. What else can we do? Whatever, we will protect the church for as long as we can."

(1) In Roumanian - Sighisoara

(2) See back cover photograph.(Sara Dörner died a few months ago.)

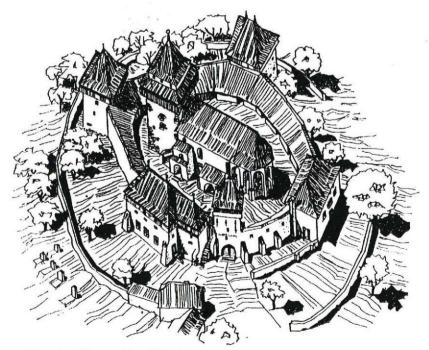


escoed vault at Malmkrog (Malincrav).

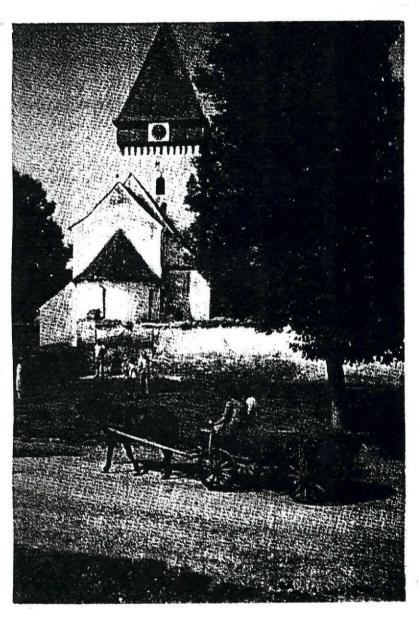
Deutschweisskirch

There are a couple of villages where there is some hope that a small Saxon community may survive. One of them is Deutschweisskirch (Viscri in Roumanian). Here the Mayor is still a Saxon despite the fact that there are only 45 Saxons living there as compared to 120 Romanians and 250 Gypsies. She is 31 year old Caroline Fernolend. She and her father, mother and family have stayed in Viscri and are determined to hold together what community is left and keep something of the Saxon culture alive. Here the bells are rung regularly, the old people are looked after and the Saxon system of "Nachbarschaft" survives, whereby for example if someone's roof or barn needs repairing everybody helps for no reward. The land redistributed after 1990 has been pooled into a private cooperative farm which is efficient and profitable. Here the industriousness for which the Saxons were well known is much in evidence.

It seems in fact that it is those who have left Deutschweisskirch who are the worst off. In the first half of 1995 the Mayoress's mother found herself ringing the bells every other week for a Saxon who had died in Germany - "of a broken heart" she says. In fact 15 Saxons from Deutschweisskirch in Germany died in the first six months of 1995. The rural life in Siebenbürgen was no preparation for survival in a modern suburb of Frankfurt or Hannover. As a result some Saxons are returning, homesick and disillusioned. In 1995 approximately 65 Saxons came back. For the villages this is good news.



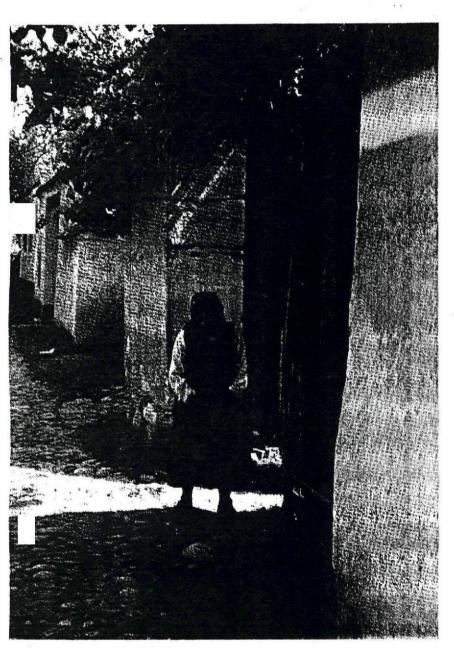
The Fortress Church of Deutschweißkirch.



the few unfortified Saxon churches at Tarteln (Toarcla).

r the churches, Dr Herman Fabini, the leading Saxon architect and author of the definitive work on the fortified churches (Kirchenburgen in Siebenbürgen, 1986), believes that until a solution for their use is found that somehow they must be maintained and protected; if they are allowed to deteriorate, he says, they will be lost forever. At the moment most of the buildings are in reasonable structural repair and few grand restorations are needed; only regular maintenance is required, for which up until now each village was always responsible. While the villages were full of Saxons this was possible; in Deutschweisskirch it still remains just possible; in Radeln, as in most of the Saxon villages, it is very difficult; in Arkeden and those where are no Saxons left it is impossible at present.

The only hope for churches such as these to survive is for money to come in from the outside. Dr. Fabini has estimated that to keep a church maintained would cost about £40 or £50 a month. The villagers are not asking for this money; they simply make do as best they can. Recently, while visiting the church of Radeln, I gave the old man who had shown me around the Roumanian equivalent of £2.50 for the collection box. As I shook his hand, on looking at his face I noticed that he had tears in his eyes; it was not so much the money as the fact that anybody should have cared. For these last old Saxons, whose lives have been so devastated by the loss of all their young people, the survival of their extraordinary churches has become their final and most earnest wish.



larkel of Deutschweisskirch (Viscri).

The who would like to help the Saxons of Transylvania to save their churches should send donations to:

The Mihai Eminescu Trust, 63 Hillgate Place, London W8 7SS

The Patrons of the Mihai Eminescu Trust are:

Lionel Bloch, Sherban Cantacuzino, James Cellan Jones, Lord Dacre, Timothy Garton Ash, Patrick Leigh Fermor, Sir Yehudi Menuhin, Professor Sir Dimitri Obolensky, Sir Steven Runciman, George Urban, John Villiers and George Walden M.P. The Trustees are: Mark Almond, Jessica Douglas-Home (Chairman), John Laughland, Noel Malcom, Christine Stone and Miranda Villiers.

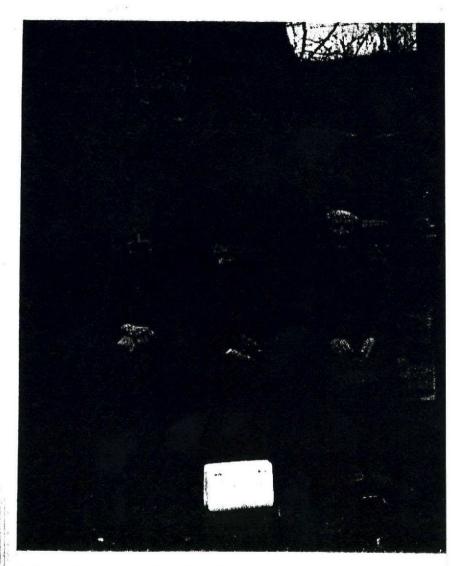
Benefactors will be kept informed on how their money is being spent and will receive a yearly report on the developing situation of the Saxon community in Transylvania.

The Mihai Eminescu Trust is a registered charity (no: 800590) concerned with the promotion of education, , culture, religion and academic research within Roumania. It is a non-political organisation and supports every kind of educational endeavour.

How the money raised would be spent.

Any money donated would be used to look after both the most important and at the same time the most neglected of the Saxon churches, of which Roades/Radeln is one. The money will be distributed by Dr. Fabini as far as possible in accordance with the wishes of the Mihai Eminescu Trust. As an architect and someone who has devoted his life to looking after the fortified churches Dr. Fabini will ensure that the money is spent correctly, efficiently and where it is most required. Leaking rooves will be mended, rotten joists replaced, plasterwork -especially exterior - will be repaired, gutters will be mended and kept clean. Only works that are absolutely necessary to keep the buildings from falling into disrepair, and thus their interiors being destroyed, will be carried out. It is absolutely clear that there will be no "restoration" of the interiors, whose untouched condition is very much part of the beauty and interest of these churches.

At the moment only a comparatively small amount of money is needed to preserve these unique buildings. However, if the structures deteriorate it will become prohibitively expensive to save them, and as Dr. Fabini has said, they will be lost forever. The Mihai Eminescu Trust, Through your generosity, hopes to get there before it is too late.



Ince ladies of Deutschweisskirch (Viscri).

From: Maritta Koch-Weser To: Mr. James D. Wolfensohn

President Has Seen

March 19, 1998

Dear Jim,

attached is a copy of our Cultural Heritage Proposal to the Development Grant Facility. We mentioned it to you during our long (and wonderful) meeting 2-3 weeks ago.

Next week is D-day for this application, and your support would be greatly appreciated. It would be so helpful to show our internal commitment via an allocation of our own grant funds, before we go out to potential donors.

Many thanks for all your support -- you helped us come such a long way.

ha le

P.S. I was so sorry to miss the beautiful concert on Monday (when I was still in Costa Rica). Caio said it was fabulous!

Maritta R. von Bieberstein Koch-Weser C:\WORD\GENERAL\NJIM.DOC March 19, 1998 11:46 AM



DEVELOPMENT GRANT FACILITY FUNDING NEW GRANT PROPOSAL FOR FY1998

III. Main Features of Proposal

1. Purpose of grant (a brief description of activities, including any administrative support, and major outputs to be financed):

Summary. Cultural heritage includes material and expressive forms as well as traditional community practices. Such heritage is a form of social capital. It can contribute to economic development by building social cohesion and community pride. It can also be a base for employment and income growth.

Unfortunately, cultural capital is being lost at an alarming rate. Moreover, the poor and indigenous peoples who could benefit from cultural conservation get scant support to articulate their interests.

Our proposal is to fund local pilot initiatives, based on participatory planning and mobilization. Results would be disseminated broadly to stimulate adaptation and replication. This would also lead to a more strategic framework for future investments (as National Environmental Action Plans stimulated investments in biodiversity in the late 1980s).

Proposals are already available from various countries (examples appear in Annex 1). To facilitate start-up an intermediary organization (the Policy Sciences Center, Inc., hereafter referred to as the Center—for details see Section IV.5) has been selected to screen proposals, identify those that have strong stakeholder commitment, including by poor groups, outline an efficient planning program, and contract with local sponsors. The Center would contract with local counterparts to manage the participatory planning and channel grants to local organizations to implement pilots. The Center would be assisted by the Cultural Heritage Network (page 2).

About two thirds of the budget would finance implementation of the pilots while about one third would fund stakeholder priority setting and planning for pilot execution.

Context. Cultural capital includes:

- material or "built" forms e.g. sites, buildings, historic city centers, land use, art and
 objects;
- creative expressions literature, oral history, language, performing arts and fine arts and crafts:
- community practices (e.g. traditional methods of healing) that contribute to group and individual welfare and identity.

Such cultural capital is a great source of social cohesion and community pride that can be used to create new development opportunities and initiatives such as:

- redevelopment of historic urban areas in a culturally sensitive manner (as has been done in the historic center of Quito, Ecuador);
- culture-based tourism that preserves cultural heritage and generates incomes for poor communities [as has been done by socially conscious tour operators (e.g., GAP Adventures, Geographic Expeditions) working directly with rural communities in Peru, Bolivia, Belize, Guatemala, Nepal and Bhutan];
- nurturing cultural institutions as community development tools (such as the activities of libraries, museums, and theaters in community outreach — e.g., the successful cultural identity and urban revival programs sponsored by the American Association of Museums and American Library Association);
- environmental projects that link cultural and natural heritage (e.g. conservation of culturally significant landscapes, such as the Annapurna area of Nepal).

However, cultural capital is being degraded and lost at dramatic rates. For example:

- Russian provincial museums, which are centers of regional identity, are starved of resources and losing their collections;
- Pillaging of national cultural sites, antiquities, and art collections in developing countries is rampant — the defacing of Angkor is one of many examples. Illicit trade in cultural property now totals \$4 billion per year;
- As indigenous groups in the Meso-American and Andean regions migrate to the cities and
 are absorbed into campesino and peri-urban life, their traditional ties to nature, their fiestas,
 crafts, and even basic identity and group self-respect are deeply eroded.

In most of these settings, the poor who could gain from conservation efforts are not sufficiently organized to articulate their interests, even to their own governments much less the Bank or other organizations.

Cultural Heritage Network Partnerships. To help marshal the resources of the many organizations active in culture, and integrate their work within a development context, in January 1998 the Bank convened the first meeting of the international Cultural Heritage Network. Participants included high-level representatives from major international cultural conservation institutions (UNESCO, ICOM, ICOMOS, ICCROM, WMF), selected foundations (Getty, Aga Khan, Kress, American Express), national expert cultural associations (e.g., the American Association of Museums, the Southeast Asian Ministers of Education Organization Regional Center for Archaeology and Fine Arts, the Smithsonian Center for Folk Life and Cultural Studies), regional organizations (OAS, IDB) and interested Government representatives (Government of Italy). This is merely the "tip of the pyramid" of the many organizations at the international, regional, national, and local levels that we expect to become involved in a program of culture in development. (Annex 2 includes information on the Network, with acronyms, technical resources, and materials on the January meeting.)

Already partnerships between the Bank and other Network members are taking shape in framework agreements for inter-institutional collaboration, including cultural heritage projects in developing countries. The Bank signed a partnership agreement with the Getty Trust in November 1997, is planning another with the government of Italy, and is exploring the interest expressed by the United States, Israel, and the Aga Khan Trust for Culture. Follow-up regional Network meetings are already planned in Latin America, Europe, and Africa. A major effort is underway to expand the Cultural Heritage Network to include more regional cultural heritage organizations, foundations, and private sector sponsors in developing countries. Members of this expanding Cultural Heritage Network want to work together on concrete pilot projects. This was a prime conclusion of the January meeting.

Goals for the DGF Grant. This DGF request is for a modest sum (\$1.5 million); with it, we want to achieve a lot. The DGF would be used to get quickly to action — funding pilot cultural heritage investments (including civil works). The pilots would be planned by the stakeholders themselves, including poor constituencies, with the help of well organized brokerage meetings. "Brokerage" here refers to the development of mutual commitments among different stakeholder groups or organizations, including agreements on contracts, joint venture arrangements, and undertakings that are within the control of the committing parties. An example appears in the Box on page 4.

The pilot activities would focus on a site or locale (such as Shibam, Yemen) or on a cultural issue (such as fine craft production in India or indigenous peoples community-development in Meso-America and the Andean regions). The pilots would be a form of action-learning, that would demonstrate results at a modest scale, in cultural conservation linked to stakeholders' development priorities. These pilots would be well publicized to encourage their dissemination and replication.

The DGF funding would be designed to leverage finance, in cash and kind, from public and private donors in the Cultural Heritage Network formed by the Bank. The pilots would demonstrate how the Network partners can best work together on specific, tangible field activities that reflect stakeholder commitment.

Box. Example of Sequential Steps of Pilot Planning and Brokerage to develop community-based cultural tourism in Bolivia and Peru:

- (a) field work (contracts) to identify eligible communities; those that are well organized and have a strong interest in adventure, ecological and cultural tourism;
- (b) contracts with local NGOs, to assist communities to articulate the ground-rules they want for tourists; arrangements for community use of revenues; proposals (attractions and logistics) to present to foreign companies (in (c) below);
- (c) planning and management of brokerage workshops between community leaders and representatives of socially conscious tour companies with good access to international markets to yield contracts, with defined commitments, agreements on logistics and time-bound next steps.
- (d) grants to communities (if philanthropic sources can not be mobilized) for capital investments in
 tourism equipment (i.e., tents, latrines, cooking equipment, etc.), and technical advice on
 environmentally sound site layout and management. (Construction costs in this case would be
 borne by the communities.)
- (e) contracts for technical assistance to communities to facilitate initial tours, with monitoring/evaluation, and recommendations for improvements.

Methods. Execution of the pilots would require investment of two thirds of the DGF resources. The stakeholder priority-setting and brokerage (leading to groups'/organizations' commitments, contracts, and complementary financial contributions to carry out the pilots) are expected to require about one third of the resources. Any analytical work by technical experts would be subsumed under either pilot planning or implementation and would be conducted quickly, to move to action as soon as possible.

The recipient of the DGF funds would function like an operating foundation that lets contracts as well as makes grants. It would let contracts to local organizations in various countries to carry out the pilot planning, and would back them up in orchestrating this process efficiently, and would make grants to local organizations to implement the pilots.

Pilot planning and brokerage is expected to pass quickly through the following stages. In consultation with the Country Director or designated staff, the Center would conduct a mission to:

- identify and select sites and issues which
 - have considerable stakeholder commitment;
 - are likely to have an impact on both cultural heritage conservation and poverty reduction;
 and
 - offer the opportunity to scale up through replication via the Bank or other sources of support;
- clarify key local stakeholders including poor constituencies; and local organizations and individuals
 who could be credible brokers among the relevant stakeholders; and
- outline the sequence and logistics to forge stakeholder agreements on priorities and implementation arrangements.

Then, it would contract with local sponsors to manage brokerage among the stakeholders to plan the pilots.

The Center would <u>supervise</u> and support pilot planning. Assuming the outcomes of the planning were acceptable to the Bank, the Center would <u>make grants</u> of up to several hundred thousand dollars for each pilot. It would be responsible for <u>monitoring and evaluation</u> of pilot implementation, and would <u>brief</u> the Bank on a quarterly basis. The Center would <u>document</u> the pilot using written cases and some videos to disseminate the results widely.¹

Illustratively, possible pilots could include:

- In Bolivia and Peru: Ethno-botanicals development; community-based ethno-tourism; crafts
 exports development
- In India: Restoration of Mogul palace gardens; apprenticeships in master-crafts that are being lost, and brokerage of higher-value export marketing; state and local communitybased tourism development
- In Bhutan: Establishment of a national Cultural Heritage Fund (design proposal already available)
- In Russia: income generating operations for Russian museums
- In Shibam, Yemen: restorations of vernacular architecture and conversion into museums;
 flood control.

2. Proposed Use of Grant Funds:

	Pilot Priority- setting and Design	Implementation of Pilots	Totals
Program Management and Auditing	\$150,000	\$100,000	\$250,000
Consultants - International ²	50,000	50,000	100,000
Local	150,000	100,000	250,000
Travel	150,000	100,000	250,000
Equipment, Buildings, Pilot materials		650,000	650,000
TOTALS	\$500,000	\$1,000,000	\$1,500,000

The viability and success of cultural heritage conservation as a means of fostering social and economic development should be demonstrated through [demonstration] projects. Successful projects, well-described and publicized, will further the cause of conservation and development by providing examples for advocates to expand sources of funding for this combined work.... Successful strategies, techniques and results should be shared so they may be replicated with necessary modifications.

Meeting Brief, Cultural Heritage and Development Action Network, January 26-27, 1998, Washington, D.C., February 19, 1998.

This monitoring, evaluation, documentation and dissemination would carry out a recommendation of the Cultural Heritage Network Meeting in January:

International consultants would primarily provide access to foreign stakeholders such as operators in the cultural tourism industry, the international hotel industry, and international NGOs that could deliver technical assistance when paid to do so.

3. Role of Bank vis a vis recipient, executing agency and other donors:

The Bank has found an effective intermediary—the Policy Sciences Center, Inc. (PSC), an unaffiliated NGO founded at Yale (see Annex 3)—to administer the grant and get the program underway for the first year. If grants were sought for subsequent fiscal years, we then would expect various intermediaries to administer portions of the grant program, as agreed by the Country Director(s) of the benefiting countries and the Bank's cultural heritage focal point, and with approval of the Director, SDV.

The main organizations for management and oversight of the FY1998 grant would be

- The grant recipient and intermediary—the Policy Sciences Center, Inc. (Annex 3). The Center would be responsible for coordinating pilot priority-setting and design; coordinating, monitoring, evaluating, and documenting implementation; and preparing quarterly progress reports on the progress under the DGF grant. The Center would liaise with the relevant Country Management Units and the Cultural Heritage Focal Point in carrying out these responsibilities.
- The counterparts in the Bank—the Country Director and the Cultural Heritage Focal Point (in the Social Family of the ESSD Network, located in LCSES). Outline programs for participatory planning of pilots would be forwarded by the Center, through the Country Director, to the Cultural Heritage Focal Point. The Focal Point would serve as the secretariat for the Bank review panel;
- The review panel—the Vice-President, ESSD (Chair), and Directors of SDV and LCSES would comment on outline programs for participatory planning of the pilots. This review phase should take not more than ten working days from receipt of the outline programs at Bank headquarters.

The Bank, principally through the Focal Point and Country Departments, would be responsible for coordinating with other members of the Cultural Heritage Network to mobilize their technical and financial support for the pilots.

After only modest lending for cultural heritage over the past 20 years, the Bank is now taking the first steps toward a greatly expanded work program in this field. While the Social Family in ESSD is taking the lead in this effort, we recognize that the work is anchored in the cross-cutting work programs of all the networks.

Bank support for programs related to cultural heritage is based on the premise that:

- cultural heritage can be a powerful source of social capital formation (helping poor groups to coalesce around common values and goals);
- conservation of cultural heritage can serve other development purposes (poverty reduction, income growth, and employment), and can be designed to maximize the benefits to otherwise excluded groups;
- conservation of cultural heritage can be an important element of a balanced development that allows for diversity, identity, and at the same time, increased opportunity;
- by conserving buildings or city centers with historic significance (not simply monumental
 architecture, but also vernacular architecture that can be readapted to new uses), societies can
 avoid wasting valuable assets, maintain links with their past, and revitalize their urban life; and
- proactive programs are needed to save cultural heritage of local and global significance.

^{4.} Rationale for Bank grant funding, and linkage to Bank's work program and development assistance objectives, including overarching objective of poverty reduction:

The pilot activities funded by the DGF would be demonstrate practical linkages between cultural heritage and development. DGF funding would also be used to mobilize private sector funding, as appropriate, within the stakeholder design of the pilots. Hence, the DGF would allow the Bank to gain more experience in supporting cultural heritage at this early stage of the program, on activities which reflect local stakeholder commitments. Importantly, the pilots would also provide organizations in the Cultural Heritage Network an opportunity to collaborate closely and at a manageable scale as they begin.

DEVELOPMENT GRANT FACILITY FUNDING NEW GRANT PROPOSAL FOR FY1998

IV. Extent of Conformity with DGF Eligibility Criteria:

1. The program contributes to furthering the Bank's development and resource mobilization objectives in fields basic to its operations, but does not compete with or substitute for regular Bank instruments.

The DGF would fund pilots and develop action programs for cultural heritage reflecting stakeholder commitments that can be translated into implementation support, including funding. The pilots would be too small to justify the transaction costs of even a LIL. However, the pilots scaled-up, could provide the bases for LILs, and potentially, ADLs and traditional loans.

These programs and collaborative pilots would mobilize the technical and financial resources of the Cultural Heritage Network. The action-learning from the pilots would help provide confidence in this emerging area, and for Bank and donor support. The action plans and pilots would also identify interests of private financiers and mobilize private finance both in the client countries and internationally.

2. The Bank has a <u>distinct comparative advantage</u> in being associated with the grant program; it does not merely replicate the role of other donors.

As the members of the Cultural Heritage Network noted at the Network's first meeting on January 26-27, the Bank is in a unique position to help client countries to conserve cultural heritage in ways that strengthen sustainable development. Certain foundations (such as the Aga Khan) do this effectively at local levels in their countries of interest, though they usually do not have the mandate to address the broad policy and institutional issues that the Bank does. UNESCO, ICOM, ICOMOS, the delegation of the Government of Italy, and the various foundations and organizations of the Network asked the Bank, at the January meeting, to launch a cultural heritage assistance program as an explicit part of its development agenda.

The DGF provides a funding vehicle for the Bank to enter this field, making the expertise of Network members available to our client countries, and most importantly, to engender priorities and undertake actions with strong buy-in from local stakeholders, and reflecting both cultural and broader developmental goals. The Bank's concern and expertise in the area of financial sustainability is particularly attractive to other agencies active in the cultural area.

At present, no donor has a major program in the cultural heritage area, though the Bank's involvement is expected to breed confidence, clarify the economic returns to cultural conservation, and stimulate more bilateral and multilateral assistance in this field.

3. The program encompasses <u>multi-country benefits</u> or activities which it would not be efficient, practical or appropriate to undertake at the country level.

The value of using the DGF is to support pilots and action-learning in a range of countries and subregions, to support cross-fertilization from these programs, and improve our understanding of the issues, opportunities and mechanisms. Multi-country exchange of experience is vital to the development of sound approaches in this emerging field. This cross-fertilization would involve lessons in stakeholder buy-in to cultural heritage action plans, and develop public-private partnerships in this arena. There will also be economies in designing study tours and cross-fertilization seminars for a range of countries which are engaged in participatory planning of cultural heritage programs. PSC's lessons in the overall management of this program could also be used by recipients in other settings in the next year.

The countries/regions potentially benefiting from FY98 grants could include:

India, Bhutan, Bangladesh
the Andean, Meso-American, and Caribbean regions
Russia, Albania
the Africa region (initial regional stock-taking)
the East Asia region (TBD)
We will start with 10% of this work program.

4. The Bank's presence provides significant leverage for generating financial support from other donors. (Bank's contribution should not exceed 15% of expected funding)

The Cultural Heritage Network partners have asked the Bank to identify pilots for them to help implement collaboratively The technical resources from the network (Annex 2 tables), plus donor contributions pledged from the government of Italy and EU financing (\$2 million p.a. already committed for FY98 and agreed for FY99 and FY00) for culture-based programs already exceed the required 85% cost share from partners.

The Getty Trust has already signed a partnership agreement with the Bank, and the Government of Italy and Aga Khan Foundation are asking the Bank to sign partnership agreements with them. Other governments, including those of the United States, Israel, and Spain are also interested in participating more concertedly as part of the Network, and partnership agreements with them are strong possibilities. Hence, mechanisms are already in place to leverage resources. Partnerships will also be brokered between similar cultural institutions (e.g., national libraries, museums, theaters and operas) in developed countries and those in developing countries. Through these relationships, well managed responsive cultural institutions will provide technical advice on management, resource mobilization, outreach and linkage to community development and education, market development and user satisfaction.

These programs are expected to harmonize with donor and the multilateral banks' priorities of urban revitalization and basic service provision for poor urban and rural communities, and generate employment and incomes for the poor. The programs are also expected to create more demand for microenterprise lending, which could be supported through both donor assistance and commercial finance. Public-Private mechanisms, such as cultural heritage funds and endowments, are also anticipated under these programs. The urban renewal, restoration, and adaptive reuse of historic city centers could also be financed through municipal bond issues.

Some of the pilots will influence potential investments in large-scale resorts (approximately \$200 million each) to be more sensitive to cultural, environmental and poverty impacts. Conservatively valuing these effects at 10% of the investment value means leveraging \$20 million.

Importantly, approval of the DGF would allow Mr. Wolfensohn to forge financial partnerships this spring with philanthropies and corporate sponsorships for the Cultural Heritage Network, showing the DGF grant as the Bank's contribution. In this context, the DGF finance could also mobilize multiples of the resources required under DGF cost-sharing guidelines.

5. The grant is normally given to an institution with a record of achievement in the program area and financial probity.

The Policy Sciences Center, Inc. (Annex 3) is a not-for-profit entity founded at Yale University in 1948, which operates through a network of about 200 professionals in international business, political psychology, political science, law, and anthropology. It is non-affiliated and has an international board with a quarter of its members from developing countries. PSC is a "public foundation" under the US Internal Revenue Code, and is therefore audited by the US Internal Revenue Service. (This is in contrast to a "private foundation" in which the donors must audit the recipient because the IRS does not audit.)

For the past 25 years PSC has been designing and organizing stakeholder consultation and agreement programs that involve multiple governments, civil associations, multi-national and local corporations (in one case, including 600 companies of which 100 were multi-nationals), in Latin America, Africa, the Middle East, Europe, and Asia (as well as North America).

PSC also has strong commitment to community development and cultural diversity. One of the earliest projects of PSC's founders was the Vicos Project in Peru (1952-62), widely cited as a seminal project in community participation, empowerment and self-governance. That project was directed by Harold Lasswell of Yale University with Alan Holmberg of Cornell University and Paul Doughty from the University of Florida (a current member of the Network).³

The Policy Sciences Center (PSC) has been providing ongoing advice to the Bank on stakeholder consultations and brokerage for development, and on the linkages between the cultural heritage agenda and the scope for enhanced private investment and local employment. PSC is adept at providing support in the planning and management aspects of these stakeholder consultation and agreement programs, with local institutions and credible individuals (highly respected in the substantive field) handling day-to-day facilitation roles. The Policy Sciences Center's experience in structuring complex multi-party stakeholder consultations and bringing them to closure on quid pro quo agreements between the stakeholder groups will be important to the success of the grant program. Moreover, the reliance on local institutions in managing these programs can build up skills in the participating countries to design and carry out such participatory planning successfully.

The Policy Sciences Center is experienced in managing grant programs (e.g., funded by the Charles F. Kettering Foundation, the Rockefeller Brothers Fund, the Ford Foundation, USAID, the International Communications Agency, UNEP, and others) and is familiar with the Bank's policies and procedures. Its financial reporting standards are high, and it is audited annually by independent auditors as well as by the US Internal Revenue Service. For this program, PSC will apply auditing procedures similar to those of large operating foundations such as the Kettering Foundation.

6. The management of the recipient institution is independent of the Bank Group.

The Policy Sciences Center, Inc. is wholly independent of the Bank Group.

Expected timetable for DGF support and exit (disengagement) strategy.

At this stage, DGF support is sought only for FY1998. Depending on our evaluation of experience during this phase, we will determine whether to seek additional DGF funding in subsequent years.

IIf the cultural heritage planning and piloting ultimately received follow-up funding, the exit strategy would be to mobilize resources for a more substantial, independent, and sustainable funding vehicle — a Global Cultural Facility. Informal discussion about creating such a GCF would be a component of the international conference on Culture in Development to be co-sponsored by the Bank and the Government of Italy in mid 1999. Experience under the DGF could help mobilize support for that fund. Building on the experience of creating the GEF, and this time seeking to establish a fund that is a public-private partnership and with more streamlined operating procedures and governance, the first phase of this new facility could be established by 2002. At that point, any new activities on cultural heritage would be funded by that facility rather than the DGF, and DGF funding would merely complete participatory planning and pilots already underway.]

Dobbins, Henry, Paul Doughty, and Harold Lasswell, Vicos: Peasants, Power, and Applied Social Change. New York: Sage Publishers, 1971.

8. The program must demonstrate an effective means of <u>promoting and reinforcing partnerships</u> with other key players in the development arena.

The DGF funding for cultural heritage action planning would provide the linchpin to propel the Cultural Heritage Network into practical action. This is essential to provide the context for the growing numbers of institutions in the Cultural Heritage Network to apply their resources in complementary and collaborative projects, mobilize support from others, and implement cultural heritage programs that support development.

Further, the DGF grant would be focused entirely on promoting and reinforcing partnerships among stakeholder groups, public and private financing sources, and expert agencies to plan and start to pilot cooperative programs of cultural heritage for development.

It would further enhance the collaboration of the agencies and organizations in the Cultural Heritage Network on practical problems, and would promote support to establish a public-private Global Culture Facility.

President Has Seen

Timetable For Culture Heritage and development:

April:

vision statement,
mapping of our data base (Bank)
design of the information mall
staffing profile (Bank)
Organize systematic contacts with other donors
prepare calendar of events for the next two years

May:

raise Trust Funds
map others' work
get buy in for information mall
get agreement on kiosks
identify/plan Bank presence at all the important international
and regional events planned
organize for an event in the fall (around annual meetings)
identify a high level advisory committee for our CH/Culture and
Development initiatives -- (first meeting of the committee in
connection with the fall event)

June:

agree with regions on detailed work program for FY99
Time Tables for each operation set
Timetables for each major activity set
key staff responsible for each activity/operation identified,
managers informed
partners in each activity/operation identified
monitoring system in place

July 1st:

execution of program launched and monitoring begins

Millennium Program:

Possible components of the proposals:

Participation in events around the world:

Make sure that the Bank and its views are systematically presented in all-important fora
Co-sponsor some events
design our own events
Note the big special UN Conference (or "summit"?) being planned

the World Bank series on culture and development:
Conceptual pieces (linked to operational program)
scholarly works (linked to operational program)
operational best practice
tool kits
other

facilitation of artistic expression from the developing countries:

Artists exhibitions folk art/troupes

The exhibits

for 2000

define cities

define level of participation in each

define coverage for each

interlinked themes, with a single unifying thread

A lasting legacy:

What will remain after the millennium events?

- A shifted paradigm: conceptually and operationally
- a new image of the WORLD BANK
- a new set of partnerships
- a network around the world
- a voice for the developing countries in expressing themselves

The Millennium Program: Timetable:

Friday April 3
present first brainstorming to JDW
get feedback from JDW
reorganize the material accordingly

week of April 6,
Meet with MMB and MB to discuss the details of a proposal
formalize proposals

Week of April 13
present to MDs and JDW
finalize outline and program of action

Week of April 20: Finalize our approach paper start contacts with the Board

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