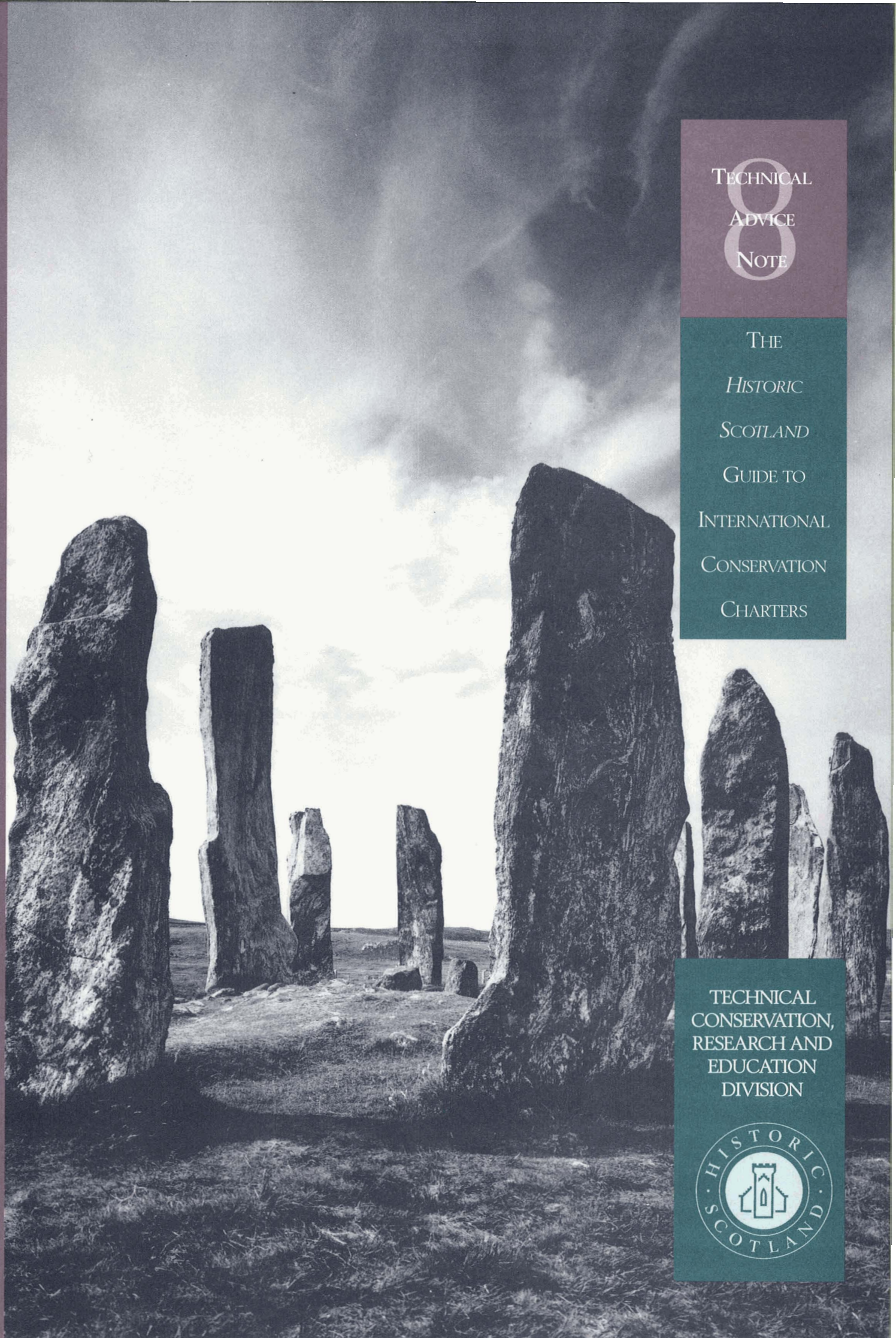

TECHNICAL ADVICE NOTE 8

THE *HISTORIC SCOTLAND* GUIDE TO INTERNATIONAL CONSERVATION CHARTERS

TECHNICAL CONSERVATION, RESEARCH AND EDUCATION DIVISION

HISTORIC SCOTLAND

TAN 8 — The Historic Scotland Guide to International Conservation Charters

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THE *HISTORIC SCOTLAND*

GUIDE

TO

INTERNATIONAL CONSERVATION CHARTERS

by

D. Bell

Commissioned by
Technical Conservation, Research and Education Division
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HISTORIC SCOTLAND

PREFACE

Heritage Conservation is by no means unique to the modern age as objects and sites of value were preserved in ancient times. However, since the eighteenth century there has been a massive growth of interest in the topic. In Scotland, early evidence of this interest is found in the record of monastic ruins published in 1693 by the King's military engineer, Captain John Slezer in his *Theatrum Scotiae*. Following the 1587 Act of Annexation of James VI, and even more so after the abolition of the episcopacy in 1689, the State became technically responsible for a number of cathedrals in Scotland. This commitment was extended to a wider range of monuments from 1882 onwards by the various Ancient Monuments Acts.

Among the nineteenth-century pioneers who were promoting public interest in conservation in Scotland was Sir Walter Scott and his views were given wide currency because of his international reputation. Robert Reid, the King's Architect in Scotland and founder of the short lived Scottish Office of the King's Works, showed a clear grasp of the principles of minimal intervention and the preservation of authenticity and historic value. As early as 1829, he wrote: "I conceive that in all cases of this kind restoration or embellishment should not be the object, but that repairs ... should be executed ... with the view solely to their preservation, and in effecting that object the less appearance of interference with their present state and construction the better." Reid's approach anticipated that of William Morris in his *Manifesto* which was, and still is, promoted by the Society for the Preservation of Ancient Buildings. Reid also guided the work of the Clerk of Works in Scotland, and other forebears of *Historic Scotland* with his vision.

Over the years, various attempts have been made to clarify and modify conservation principles and a number of statements, the *Venice Charter* being the best known, have been produced. In addition, over the century that has passed since William Morris penned his *Manifesto*, much has been learned about different aspects of technical conservation. For example, more is now known about traditional building materials and construction methods; new means of non-destructive investigation and recording have been developed and scientific research has provided increased understanding of the complex processes of decay. Whilst being informative in their own right, such advances in knowledge often create dilemmas for practitioners as they can directly challenge previously published statements on the philosophy and ethics of conservation work.

By bringing together for the first time and analyzing over seventy national and international statements of conservation principles in this advice note, we hope that this guide by Dr. Bell, Director of the Scottish Centre for Conservation Studies, Edinburgh, will provide the basis for a better informed approach to building conservation work in Scotland and elsewhere.

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May 1997.

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My thanks also to the architect Ola Laiho who allowed me to use one of his own photographs for illustration [3], and to the Photographic Library of *Historic Scotland* who provided illustrations [1], [2] and [4b] (Crown Copyright).

The Project Manager for *Historic Scotland* was Robin Kent, Senior Conservation Architect.

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INTRODUCTION

Conservation, by any name, has been a long standing obsession of mankind. Today, in the late twentieth century, the issue affects the whole of society, from the everyday life of the individual to the well-being of humanity.

Over the past sixty years, a series of Charters, Conventions and Recommendations have been drawn up by the international community. These have five main purposes:

1. to state the factors that make the built environment important to the well-being of society;
2. to summarize the degree of international agreement on the way in which these factors should be acknowledged and protected by legal, social, and organisational mechanisms at national government level;
3. to set a code of ethics for the protection of the environment;
4. to offer guidelines on the courses of practical action which are acceptable and unacceptable under that code of ethics and,
5. to define the terms used to describe these courses of action in order that no misunderstandings can occur and no false representation can knowingly be made.

By doing this, they also form

6. a reflection of societies' changing attitudes to the value and benefits of the environment and their acceptance of responsibility for its protection.

Charters are, in effect, a guide to good practice.

Four basic design principles underlie the more recent Charters. All countries, to a greater or lesser extent, have agreed that when work is carried out under the terms of conservation,

a. any intervention should be only the minimum necessary for the site's survival,
b. only a minimal loss of the existing fabric is acceptable,
c. any intervention should, as far as possible, be reversible and,
d. new work should be clearly differentiated from the old.

These principles have been developed from many years of often furious debate. For centuries, each generation has argued over alterations to their environment and it has been a constant source of bitterness that the old qualities were nearly always destroyed when new qualities were added. As a pamphleteer in eighteenth-century Edinburgh complained,

"They do not always deal in blood;
Nor yet in breaking human bones,
For Quixot-like they knock down stones.
Regardless they the mattock ply,
To root out Scots antiquity"[1]

The legal right to state protection of sites is far from being a recent phenomenon. Over two and a half thousand years ago, for example, a Mesopotamian ruler threatened to hang anyone

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[1] "Echo of the Royal Porch of Holyrood House which fell under Military Execution anno 1753" by *Claudero*.

who spoiled the prospect or appearance of the Royal Road of Nineveh[2]; the ancient Greeks tightly controlled the development of their cities and the care of their monuments[3]; and in the first century AD a Roman Codex forbade the demolition or removal of specific parts of buildings (including fixtures and furnishings) which were essential to their quality[4]. Nearer the present day, a Royal Proclamation of 1666 demanded the protection of all historic monuments in Sweden. The Grand Duke of Hesse issued a Decree concerning surviving monuments in 1818, the newly independent Greece followed in 1834, France prepared a framework of controls and grants to major cathedrals and other great monuments in 1841, Spain made its first list of "national monuments" in 1860, Italy in 1872, Hungary and Egypt in 1881, and in the United Kingdoms basic protection in law began in 1882 when the Ancient Monuments Protection Act was passed. Finland issued its first protective legislation in 1883, Bulgaria in 1889, Rumania in 1892, and Norway in 1897 (though the *Society for the Protection of Ancient Norwegian Monuments* had been founded in 1844)[5].

Since state protection has been given to some parts of the environment for so many years, why are Charters necessary? Charters tackle the questions which the law, as merely a tool for society to use in attaining its ends, cannot answer. What "protection" meant, why it was being given and how it should be carried out on site were issues which were still to be decided. Despite the accumulation of more and more detailed legislation, the underlying aims, ethics and the practical implications of protection remained unresolved.

An enormously wide range of opposing actions with contradictory motives have been taken over the years, all in the name of protecting sites and monuments. The reason for such conflicting opinions of "good" and "bad" work lies in the question of value. What is seen as the predominant quality of benefit to society? The Roman Cicero, for instance, was baffled by the Greeks' refusal to sell their cultural treasures of their own free will: "*they account it the height of disgrace to have it set down in their public records that their community was induced by the offer of money ... to sell and alienate its ancestral heirlooms*"[6]. His fellow Romans appear to have looked on foreign monuments and artifacts mainly as aesthetic "toys", commodities whose value ultimately rested in the price they could fetch, a view in total contrast to that of the Greeks who had a conscious perception of the continuity and history of their race - of time itself as shown by their monuments - and to them that quality was beyond price. Because of these differences in attitude, the Greeks put as much if not more value on the authenticity and integrity of the site as a whole as on the separate parts of its fabric, however decorative and finely carved, on keeping faith with the original intention or impulse behind its creation, but to the Romans, virtually none of the monument's value or quality was lost by being dismembered, moved or reconstructed. What to the Greeks was a desecration of their culture, to Cicero was an admirable but essentially mystifying rejection of a fair price - hence his confusion. "Cultural imperialism" also had its part to play in Roman attitudes. Like defeated enemies, great cultural monuments were signs of Rome's victorious might, to be carried off in triumph and placed on public show. As to their own personal property and their

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[2]Inscription on stele of 700BC quoted by Cevat Erder in *Our architectural heritage: from consciousness to conservation*, (UNESCO, 1986), p.25.

[3]See Erder 1986, pp. 28-35.

[4]The "*Codex de Aedificatis Privitis*" of Emperor Hadrian, quoted in Erder 1986, p. 45.

[5]Taken from *Restoration and Anti-Restoration*, Stephan Tschudi-Madsen, 1976.

[6]Cicero, "Douleur des cités dépouillées", *Discours, Seconde Action Contre Verres*, Book IV, 53, pp. 82-3 (trans. Gaston Rabaud), (Paris, 1944), quoted in Erder 1986, p. 44.

own family's name, their feelings were much like the Greeks; it was a dishonour to sell or even put a price on the houses left to them by their ancestors[7].

This is obviously a very brief and generalised view of a number of complex issues (that will be referred to again in Chapters 1 and 4), but it serves to lead into the great nineteenth-century debate which set the value of contemporary taste against that of authenticity.

Put crudely, the one side held to the principle of *l'unité de style* when working on ancient buildings. It followed Viollet-le-Duc's definition of **restoration** - to restore a building is to bring it back to a state of completeness which may never have existed at any given time[8]. The "Restorers" valued aesthetic and structural consistency, a complete even if deceptive image above all, and therefore maintained that every building and every one of its components should be reconstructed, re-created or completed in its predominant style as a creative act. To them, the value of the new appearance of their design was well worth the distortion of historical evidence, the loss of aesthetic integrity and the eradication of all the visual and emotional qualities that genuine (or authentic) age brings with it.

The other side took almost exactly the opposite stance; in its view the genuine if worn original was worth immeasurably more than even the most perfect modern imitation, however carefully the character of the original had been forged. It held to the "conservative" principles expounded in John Ruskin's leading work, *The Seven Lamps of Architecture* (1849)[9], a book which had such effect that by 1865 even advice given by the RIBA first assumed that those involved in work on ancient buildings were "*anxious to carry [it] out ... in the most conservative manner*". "*After all*", wrote a correspondent of *The Builder* in 1873, "*perhaps the best, and simplest counsel to offer those engaged in a restoration was ... to do as little as possible*"[10]. Here the genuine qualities of age were valued as what might now be called a non-renewable resource, that should be maintained rather than recast in a deceptively youthful guise. It is interesting to note that the "conservative" view was (and still is) taken by many of the more outstanding designers of the time (like Philip Webb and William Lethaby), perhaps because of their skilled appreciation of architecture's more subtle qualities. (Today, the fusion of conservation and design might be represented by the elegantly minimal interventions of, for example, Carlo Scarpa, Sverre Fehn and the Spaniards Torres and Lapena.) The best-known proponent of Ruskin's creed, the *Society for the Protection of Ancient Buildings (S.P.A.B.),* was founded by William Morris and a small group of friends in 1877. With a rousing "Manifesto"[11] which echoed Ruskin's "Lamp of Memory", Morris thrust the "conservative" precept into the attention of a much wider public where, with the occasional prod from his still flourishing society, it has remained till the present day.

The principle of **authenticity** runs through almost all the various strands of the conservation debate, including the concepts of cultural diversity and national identity which together with the more basic ecological benefits of re-using scarce resources have become widely acknowledged as significant factors in the value of older buildings. In Scotland, these qualities were stressed soon after the rise of the *Association for the Preservation of Rural Scotland* and

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[7]Erder 1986, p. 45.

[8]"Restaurer un édifice ... c'est le rétablir dans un état complet qui peut n'avoir jamais existé à un moment donné." Viollet-le-Duc, *Dictionnaire raissonné de l'architecture française*, vol. VIII (Paris, 1866), p. 14.

[9]See Appendix 2.

[10]Edmund Sharpe, "Against restoration", *The Builder*, 23 Aug. 1873, p. 672.

[11]William Morris founded SPAB in March 1877, and the Manifesto was published in the *Athenaeum* in June the same year (see Appendix 2).

the founding of the *National Trust for Scotland*[12] in 1931. The Trust, itself said to be part and parcel of "*the hesitant beginnings of a national revival that seems gradually to be infusing a new life into modern Scotland*"[13], was convinced that the "*sturdy stone construction*" of buildings threatened under slum clearance schemes could make a valuable contribution to the housing needs of central urban areas[14]. As well as lesser buildings' role in acting "*as a bulwark against the provincialisation of Scotland*"[15], in terms of today it argued that they were worth keeping as a sustainable resource, a practical argument that saved many of our now more appreciated buildings from the bulldozers.

The first attempt to address the core issues of conservation on an international scale came when a conference[16] to discuss and clarify the ethics of work on protected sites was held in Athens in 1931. A year later, the Assembly of the League of Nations formally agreed to communicate its recommendations (known as the *Athens Charter*[17]) to the member states. Though now its articles may seem dated, this is generally recognised as the beginning of today's long line of internationally agreed standards of practice.

Next UNESCO continued its predecessor's role, and from the 1950s onwards passed a series of Conventions designed to safeguard a wide range of cultural property including archaeological sites, movable works and landscapes, as well as the built environment. UNESCO Conventions, as might be expected from the forum of the governments of nations, are most deeply concerned with property of world-wide significance[18].

Then in 1964 what is probably the greatest influence on today's international conservation movement - the *Venice Charter* - came into being[19]. This grandparent of twentieth-century Charters has been the starting point for all the many others which followed. Its recommendations also led directly to the founding of ICOMOS (1965), an organisation with the aim of promoting "*the theory, methodology and technology applied to the conservation, protection, and promotion of the worth of monuments and historic areas*"[20]. During the thirty years from its founding to today, ICOMOS national and specialist committees have gone on to develop the basic principles of the *Venice Charter* in greater depth.

If anything, ICOMOS Charters have a slight bias towards the practical implications of conservation ethics, ie; **how** protective work should be carried out. The more social issues have been faced by the third of the foremost producers of conservation guidelines, the Council of Europe, an organisation founded in 1949, which sought,

"*to foster the advancement of heritage protection and enhancement policies*

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[12]Many of the works of the National Trust in its early years were notably minimalist (see *Gladstone's Land*, Isla Macneal, a Paper for the Scottish Centre for Conservation Studies, 1992).

[13]Robert Hurd, *Scotland under Trust* (London, 1939), p.xii.

[14]ibid, p.49.

[15]ibid, p. xiii.

[16]Held by the International Museums Office under the auspices of the International Committee on Intellectual Co-operation. Victor Horta was a major contributor.

[17]Not to be confused with the *Athens Charter* of the International Congress of Modern Architecture held in 1933, whose decisions were later edited by Le Corbusier.

[18]The concept and legal framework of "World Heritage Sites" were established in its Convention of 1972.

[19]The outcome of the IInd International Congress of Architects and Technicians of Historic Monuments.

[20]*ICOMOS News.*

within the framework of a pan-European project of cultural and social development, and to develop a model for European society where the right to a heritage, that is, the right to a memory and to a better living environment, could constitute a new generation of human rights, after political rights, social rights and the right to information." [21]

In its Charters, the changing values of society have been mapped and the social implications of protecting sites and the benefits this can bring have been thoroughly explored.

Together, the efforts of the Council of Europe, UNESCO and ICOMOS backed by many small specialist organisations such as ICOM (museum conservators) and IUCN (nature and natural resources) are leading in the ethical and practical field and giving an expert counterpoint to national legislation.

In Scotland today, the protection of our environment is regulated by a growing corps of national and local government officers. *Conservation* is emerging as a specific professional discipline in its own right and, because of this, much greater demands are being made on those involved in working on the existing fabric of our towns and cities. The detailed recommendations contained in the 1993 *Memorandum of Guidance* are now backed by a series of *Technical Advice Notes* and a book on *The Repair of Historic Buildings in Scotland - Advice on principles and methods* (all produced by *Historic Scotland*), as well as a *British Standard Guide to the Care and Conservation of Buildings* which is due to be released in the near future. The message of the Charters now forms the basis of current international conservation philosophy, and the following chapters are intended to act as an introduction to their content and to lead to a better understanding of the reasoning behind what has become the established code of acceptable practice.

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[21] *European Heritage*, no.1, 1994, p. 10.

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WHY CONSERVE?

At the core of each and every Conservation Charter is the question, "why conserve?". Why should anyone care what happens to our surroundings?

This is a new question for society. Earlier generations were more likely to have wondered why anyone would not care. If something was there to be used, why waste it? In a straightforward and practical combination of thrift, minimum effort and learning from experience, they kept what was useful and adapted what was not, or left it aside until a new use was found. There were, of course, other factors that affected attitudes in the past. Small communities in constant threat of devastation and possible annihilation tended to revere any mark of continuity and stability, and generations of families living off the same patch of land developed close bonds to place. The signs of age, of experience and survival were more to be desired than the too vulnerable, powerless stage of youth; similarly new buildings were not necessarily preferred to the old that had proved at least that they could withstand the worst of man's and nature's acts. In all, there was a more general appreciation of works that stood the test of time and of the less obviously practical value of continuity, familiarity, mystery and spirituality. Our predecessors seem to have had no difficulty in deciding what was of value to them and only the parts of their surroundings which affected the well-being of the community or their chances of survival were eradicated, such as those which had caused floods, famine, disease and other harms.

By the end of the eighteenth century, the decision was becoming more complicated. In an increasingly industrialised society, it was much less simple to agree on what was useful when communities contained hundreds of thousands of people organised into complex social structures. Consumerism, once firmly discouraged by primitive economies and mediaeval sumptuary laws, was a growing force and, to the new men of Commerce, it often seemed more profitable to discard than to keep, and even better to demolish than discard, regardless of the general well-being.

Today, under the terms of our own intricate political and economic systems, practicality can be argued in many different ways. It is no longer obvious to everyone that most of our environment is well worth keeping, and the case for conserving it has to be proven not taken for granted. The reasons for making the choice have to be spelled out: what are the factors being considered? what <u>is</u> the difference that it makes to our lives?

Nearly all Charters, Conventions and other similar documents begin by explaining **why** it is important to take more care of some parts of the environment than others and exactly **where** their value to society rests. With the underlying benefits made plain, it is much easier for all members of society, not just conservationists, to see that these outweigh any possible inconvenience. They can judge for themselves that making the extra effort is clearly to their advantage and that the price of protection is well worth paying.

All action in the field of conservation is affected by the appraisal of value. It fixes the range of **what** is protected and justifies attitudes on **how** it is protected. It gives a clear view of how far the quality that makes a site of value to society is being maintained (or lost) in the process of work designed to protect it, and therefore whether the proposals are acceptable or unacceptable. Conservation is not anti-change, it is only against change for change's sake

alone and against change for the sake of a single interest at the expense of the common good.

Values themselves have altered over the years, and now we protect some quite different parts of the environment for quite different reasons from the ones being argued over in the nineteenth century. And because some of the reasons for conserving have changed, so have the recommended methods of work, even in the relatively short period between the signing of the Athens Conference Recommendations in 1931 and latest Charters of the 1990s. It is worth considering just what are the qualities each Charter is designed to protect, not as a matter of historical interest but because their recommendations will make sense only if we understand their quite specific view of what society has to gain or lose.

Perceptions of Value

The beginnings of today's conservation policy can be found in the avalanche of books, articles, pamphlets and speeches on the subject of protecting buildings which assaulted nineteenth-century society. A passion for works of great age and works of great architectural quality consumed the originators of the present movement. They valued buildings for their use as historic records - as physical data to aid scholarship - or as works of "high" art in comparison to an "ideal" beauty. Stemming from the antiquarian societies of the eighteenth century, on the whole it was a dry assessment, but there was a more emotional view. The sentiment of age, the glory of "*walls washed by the passing waves of humanity*" which "*connects forgotten and following ages with each other, and half constitutes their identity, as it concentrates the sympathy of nations*" was relished. Many, like Ruskin, found beauty in the marks of age which added "*richness of effect when their details are partly worn away*" to the character of basic forms[22]. At the same time, some sections of the artistic community as well as social commentators were reacting against the impersonal and alienating effect of industrialised building techniques in favour of more traditional methods. But despite the appeal of the "picturesque" and the fervour of the Arts and Crafts movement, only the abstract and indirect academic advantage to society was considered worth financial support, and only a few of society's members appreciated the benefits to learning and taste. "*If ... it be asked us to specify what kind of art, style, or other interest in a building makes it worth protecting,*" wrote William Morris, "*we answer ... any work, in short, over which educated, artistic people would think it worth while to argue.*"

With these values in mind, some of the work being carried out on protected buildings became deeply undesirable, especially the destructive attempts by the mid-nineteenth-century "restorers" to recapture an idealised past. The "General Advice to Promoters of the Restoration of Ancient Buildings" published by the RIBA in 1865 made the practical implications very clear:

> "*The duty therefore of all those having charge of ancient buildings should be not so much the renewal of whatever remains as its preservation; and this should embrace every portion of original work which it is in any way possible to save,*

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[22]Ruskin denied the value of the "picturesque" concept of "universal decay", and redefined it as "a sublimity dependant on the accidents, or on the least essential characteristics, of the objects to which it belongs". He argued that beauty of age could only be found in "essential" forms, based on points of shade rather than purity of outline, whereas "unessential" forms which were based on detail and enrichment were marred by defects. (John Ruskin, *The Seven Lamps of Architecture*, "The Lamp of Memory" : XII - XVII).

for it must be remembered that new work is of no value or interest excepting so far as it serves to preserve the ancient design, and that no interest will ever be attached to it unless the original parts remain to attest its authenticity."[23]

The argument for conserving historical and aesthetical values - and the way to conserve them - was so obvious after the nineteenth-century debates that the Athens conference of 1931 saw no need to discuss or expand on them. Used as a basis for the conference recommendations, their acceptance was taken for granted. But the case for the sentimental or emotional value of a building, far from being accepted, was no longer given serious consideration in any part of the advice. It was only after the physical and cultural devastation of the Second World War that great and ancient buildings again took on a more immediate, less intellectual significance. Deep cultural prejudices had to be overcome for lasting peace and, since "*the feelings aroused by the contemplation and study of works of the past do much to foster mutual understanding between nations*"[24], their advantage as a point of contact between formerly warring nations began to be appreciated. In the early 1950s, every effort was made to emphasise world unity and common interest, and even bombed-out ruins could be used to make the point:

"... *damage to cultural property belonging to any people whatsoever means damage to the cultural heritage of all mankind, since each people makes its contribution to the culture of the world."*[25]

"High" architecture had became a useful tool in the struggle for international understanding.

Broadening Interest in the 1960s

Two decades after the war, most of the world had settled down to enjoy peace and prosperity, and to ponder the effects of the first post-war years' enormous, almost frantic effort to build a new world "fit for heroes". The sheer extent and urgency of basic need, for proper shelter, warmth, space, light and sanitation, to provide better living conditions for the returning troops and their families had seen whole cities rebuilt and an incredible number of new homes, new schools, hospitals and churches put up as quickly as humanly possible. Now, the worst was over. With a new sense of security and a better standard of living, with different aspirations and more leisure, many began to consider their surroundings more carefully and to appreciate what previously had been taken for granted. Places that were of no significance under the long-established criteria of art history and age were found to be of value. It was recognised that towns and the countryside had other less definable qualities which benefited everyone directly as well as a rather remote academic value[26]. In the words of the UNESCO Conference of 1968, "*the well-being of all peoples depends, inter alia, upon the existence of*

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[23]Sessional Papers of The Royal Institute of British Architects, 1864-65, 1865, pp. 1-4, quoted in full in Tschudi-Madsen 1976, Appendix III, pp. 120-6.

[24]*Recommendations on International Principles applicable to Archaeological Excavations*, UNESCO (New Delhi, 5 Dec. 1956).

[25]*Final Act of the Intergovernmental Conference on the Protection of Cultural Property in the Event of World Conflict*, UNESCO (The Hague, 1954).

[26]Beauty and character represents "a powerful physical, moral and spiritual regenerating influence, while at the same time contributing to the artistic and cultural life of peoples". (*Recommendation concerning the safeguarding of the beauty and character of landscapes and sites*, UNESCO, [Paris, 11 Dec. 1962] preamble).

a favourable and stimulating environment and that the preservation of property of all periods of history contributes directly to such an environment"[27].

Surprisingly, there is no sign of the growing awareness of conservation's more fundamental purposes in the most famous charter of the time, the ICOMOS *Venice Charter* of 1964. Its stated intention in conserving and restoring monuments was to "*safeguard them no less as works of art than as historical evidence*" (article 3), still an almost purely academic view of the benefits to society, and only the "*unity of human values*" and the regard for ancient monuments as a "*common heritage*" (preamble) were stressed, as they had been in the 1950s. But however conventional the assessment of value may have been, for the first time all the possible courses of practical action were methodically and rigorously considered against its criteria and the basis for determining their acceptability and unacceptability was clearly defined. In all, the *Venice Charter* laid down an immensely strong framework of guidance for work designed to conserve the historic and aesthetic value of a "monument". The practical implications of putting value on the more emotional and social effects of our surroundings were not to be explored for another ten years.

Areas and Individuality

An enormous range of benefits opened up in unexpected places under the social, "spiritual", economic and even psychological yardsticks of the 1960s. In 1975 the Council of Europe produced a Charter which emphasised "*the relevance of the past to contemporary life*"[28] and examined the impact that an old area could have on improving the daily lives of its inhabitants. Its signatories argued that society should protect areas as props of the common good as well as safeguarding particular monuments as works of art and as historical evidence. Their assessment of the environmental qualities worth protecting was quite different from the formal, almost clinical appreciation of previous Charters and in its own way this document, known as the *Amsterdam Charter*, echoes the passionate clarity of Ruskin.

The idea of "Heritage"[29], now so often misused, was re-introduced:

> "*The past as embodied in the architectural heritage provides the sort of environment indispensable to a balanced and composite life. In the face of a rapidly changing civilisation, in which brilliant successes are accompanied by grave perils, people today have an instinctive feeling for the value of this heritage. This heritage should be passed on to future generations in its authentic state and in all its variety as an essential part of the memory of the human race. Otherwise, part of man's awareness of his own continuity will be destroyed.*" (principle 2)

The concept of architecture as a non-renewable resource was applied:

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[27] *Recommendation concerning the preservation of cultural property endangered by public or private works*, UNESCO, (Paris, 19 Nov. 1968), preamble.

[28] *European Charter of the Architectural Heritage*, Council of Europe (Amsterdam, Oct. 1975), article 1.

[29] This interpretation of "heritage" with its connotations of a merely lifetime interest in trust for future generations rather than outright ownership - a duty more than a gift - had held constant from the classical times to the present day. (See Introduction p.2.)

"The architectural heritage is a capital of irreplaceable spiritual, cultural, social and economic value. Each generation places a different interpretation on the past and derives new inspiration from it. This capital has been built up over the centuries; the destruction of any part of it leaves us poorer since nothing new that we create, however fine, will make good the loss. Our society now has to husband its resources. Far from being a luxury this heritage is an economic asset which can be used to save community resources."(3)

Social issues were faced:

"The structure of historic centres is conducive to a harmonious social balance. By offering the right conditions for the development of a wide range of activities our old towns and villages favoured social integration. They can once again lend themselves to a beneficial spread of activities and to a more satisfactory social mix."(4)

The educational value was spelled out in detail:

"The architectural heritage has an important part to play in education. The architectural heritage provides a wealth of material for explaining and comparing forms and styles and their applications. Today when visual appreciation and first-hand experience play a decisive role in education, it is essential to keep alive the evidence of different periods and their achievements ..."(5)

The empnasis of the 1975 *European* (or *Amsterdam) Charter* was on its vehement and meticulous recognition of a much wider scope of attributes than had previously been considered as of value. It was instantly followed by the more detailed *Declaration of Amsterdam*[30], whose clear statement of the new conservation credo is worth quoting in full:

"The significance of the architectural heritage and justification for preserving it are now more clearly perceived. It is known that historical continuity must be preserved in the environment if we are to maintain or create surroundings which enable individuals to find their identity and feel secure despite abrupt social changes. A new type of town-planning is seeking to recover the enclosed spaces, the human dimensions, the interpenetration of functions and the social and cultural diversity that characterised the urban fabric of old towns. But it is also being realised that the conservation of ancient buildings helps to economise resources and combat waste, one of the major preoccupations of present-day society. It has been proved that historic buildings can be given new functions which correspond to the needs of contemporary life. ... Lastly, the rehabilitation of existing housing helps to check encroachments on agricultural land and to obviate, or appreciably diminish, movements of population - a very important advantage of conservation policy."

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[30]Issued by the delegates to the Congress on the European Architectural Heritage at whose opening the Charter had been announced.

The Charters of the 1970s were trying to control an environmental crisis. Well-known areas full of character and thousands of small traditional buildings were near to extinction in the second wave of massive re-development that was sweeping Europe. With the exception of great monuments, every part of the old environment was being wiped out - the good as well as the bad. "You don't know what you've got till it's gone" was a common lament.

It was a world-wide problem. Internationalism had spread with the strengthening of the greater nations' economies, and its effects now threatened to obliterate the cultural differences which had been all too apparent before the 1950s. The benefits of unity, promoted by the United Nations in the difficult post-war situation, had turned into the dangers of uniformity. Derided as "little boxes" which "all look just the same", new development met with a bitterly antagonistic popular reaction. In an almost total reversal of policy, the maintenance and encouragement of tradition and diversity become the objective; the first to sustain the pride of the more vulnerable cultures; and the second to help to counter the homogeneity of the internationalist ethos. For, as was stated in the preamble of the UNESCO *Recommendation* of 1968:

> "*Contemporary civilisation and its future evolution rest upon, among other elements, the cultural traditions of the peoples of the world and their social and economic development*".

The "*significance and message*" of the composition of minor buildings in long-established settlements could "*become a part of the spirit of peoples who thereby may gain consciousness of their own dignity*"[31]. Their value in stemming the particularly damaging effects of current cultural imperialism on top of past colonialism in Asia[32] and Africa was debated at length by UNESCO:

> "*... in the face of the dangers of stereotyping and depersonalization, this living evidence of days gone by is of vital importance for humanity and for nations who find it both the expression of their way of life and one of the corner stones of their identity, ... historic areas are immovable heritage whose destruction may often lead to social disturbance, even when it does not lead to economic loss, ...*"[33]

Meanwhile, ICOMOS was gradually coming to terms with alternative values, and began a series of Symposia to examine ways to conserve particular types of lesser buildings. The *Yazd Symposium* on monuments of mud brick (1972), like the *Venice Charter*, still put the greatest weight on the value of such structures as historic evidence, as "*essential elements in the history of architecture*", but the themes of continuity, social balance and stability were evident, though in a very minor key:

> "*urban complexes built in these materials still form a living habitat, whose human and social qualities are recognised*". (opening paragraph)

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[31] op. cit., UNESCO 1968.

[32] *Intergovernmental Conference on Cultural Policies in Asia*, UNESCO (Yogyakarta, 1973).

[33] *Recommendation concerning the safeguarding and contemporary role of historic areas*, UNESCO (Nairobi, 26 Nov. 1976).

A far more aggressive justification of the value of "vernacular" architecture was made after the 1975 *Plovdiv Symposium*, on much the same grounds as were used the same year in the *Declaration of Amsterdam*:

> "*with the prospect of a new pattern of economic growth, more careful than in the past to avoid waste and to make the most of existing assets, the vernacular habitat constitutes an invaluable fund of architecture which it would be folly to throw away, ... today a vernacular architecture can offer a more varied habitat and one more appropriate to the permanent needs of man than modern conglomerations* ..." (preamble)

Only the delegates to the earlier European Congress of Local Authorities at Split in 1971 followed an entirely different pattern of reasoning from that of the rest of the international conservation community. Like the developers, Town Planners had their own agenda that at the time placed a much greater weight on a possible financial or economic return than on any other quality. Where the signatories of all other documents valued sites for the qualities which existed in them from and because of their origin (historical evidence, "high art", character, continuity, stability, social balance, cultural identity, etc), the Split delegates had appeared willing to prize them only if they could be made to conform to a contemporary norm. The main objective of preserving monuments, groups of historic buildings and sites, they stated, should be "*their reanimation in order to give them a true function in modern cities while respecting as far as possible, their original vocation and social context*"[34]. Rather than valuing the very uniqueness of particular environments for all the benefits to the community so carefully explained in other Charters, the *Split Declaration* appeared instead to devalue it for the sake of a more uniform urban order[35].

A firm rebuttal of this position was given by the ICOMOS conference in Plovdiv and after establishing the unique benefits of the vernacular "habitat", the 1975 Symposium reversed the emphasis and suggested instead that its use might "*imply a fundamental recasting of economic planning models and a co-ordinated policy of decentralisation and rural development*". ICOMOS, the Council of Europe and UNESCO all took the stance that the quality of our surroundings should be conserved and that, if necessary, the planning ideology threatening it should be reconsidered.

Lastly, though Nature conservation in itself is outside the scope of this guide, its aims too were undergoing some radical changes. There was a much greater emphasis on research and breeding in preference to using the more exotic wildlife species as "peep-shows" in traditional zoos; a minimal interventionist approach of habitat protection; a greater emphasis on biological diversity; and an all inclusive regard for even the smallest insect and the least attractive plant. Perhaps most far-reaching of all, the beginnings of environmental audit were encouraged as a new means of assessing the cost of development by its energy consumption and global effect. There were many parallels with architectural conservation on the way to today's more holistic

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[34]Article 7.ii. What the delegates meant by a "true" function is left undefined, but the presumption must be that whatever function the buildings had originally or at present was in some way not "true".

[35]A site's "economic" value has been defined by Fielden and Jokilehto as both financial and generated by the site itself or by the process of conservation (*Guidelines for the Management of World Cultural Heritage Sites*, ICCROM, 1993, p. 19). Unlike intellectual, aesthetic or emotional values, "economic value" does not depend on any quality intrinsic to a site. Its assessment is totally dependent on external, comparatively short-term factors or "market forces"; eg, intensity of demand, rate of property investment, level of unemployment etc.

concept of a balanced and sustainable ecological development, part of which Jokilehto terms "*a more appropriate collective cost-benefit approach*"[36].

The Particular Interests of the 1980s

With the broader qualities of the environment established by the work of the previous thirty years, the Charters of the 1980s began a search for a more accurate and precise description of the value of their own particular interests such as gardens, archaeology, twentieth-century[37] and industrial[38] buildings and, of course, towns and areas. There was a even a brief return to the post-war interests of the 1950s in the ICOMOS *Declaration of Dresden* on the reconstruction of monuments destroyed by war (1982). Signed at a time when the "cold" war between the communist and capitalist worlds was nearing its end, it again proclaimed the ability of great monuments to overcome divisions between nations;

> "*Worldwide exchange of knowledge and experience on characteristic features, historical evidence, and the beauty of the cultural heritage, especially the monuments of every people and each ethnic and social group, plays a constructive role in assuring equitable, peaceful co-existence between peoples.*"(12)

A special case was made for the symbolic value of fabric destroyed in such a cataclysm once post-war social development began and, therefore, for its "restoration" and "reconstruction".

Perhaps because of the signatories' closeness to and personal involvement with what were very specialised areas, some of the more recent ICOMOS Charters (which unlike UNESCO and to a lesser extent Council of Europe documents have no set format) have taken on their own highly individualistic character. The *Florence Charter* on the preservation of historic gardens (ICOMOS-IFLA, 1981) is one of the more idiosyncratic, particularly in its description of a garden's value as:

> "*the expression of the direct affinity between civilisation and nature, and as a place of enjoyment suited to meditation and repose, the garden thus acquires the cosmic significance of an idealised picture of the world, a "paradise" in the etymological sense of the term, and yet a testimony to a culture, a style, an age, and often to the originality of a creative artist.*" (5)

but its version of the *Venice Charter*'s article 3 is surprisingly weak. An historic garden, it states, is an architectural and horticultural composition "*of interest to the public*" from the historical or artistic point of view (article 1). In contrast, the Charter on the protection and management of the archaeological heritage (ICOMOS-ICAMH, 1989) is strong and uncompromising in its stance that a knowledge and understanding of the origins and development of human societies is "*of fundamental importance to humanity*" in identifying its

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[36] Fielden and Jokilehto 1993, 19.

[37] *Recommendation R(91)13 on the protection of the twentieth-century architectural heritage*, Council of Europe, 1991.

[38] *Recommendation R(90)20 on the protection and conservation of the industrial, technical and civil engineering heritage in Europe*, Council of Europe, 1990.

cultural and social roots" (introduction). Any value in the "sentiment of age" which can be directly experienced by the general public is ignored in the assessment which follows, and only those benefits which can be appreciated through the intervention of academics is considered:

> "*The archaeological heritage constitutes the basic record of past human activities. Its protection and proper management is therefore essential to enable archaeologists and other scholars to study and interpret it on behalf of and for the benefit of present and future generations.*"

On the whole, all the specialist Charters of the 1980s and early 1990s justified the protection of their particular area of interest by a variation of the conventional methods of evaluation, all of which needed an academic interpretation to be fully understood (ie, for historic and "high" art reasons) and not by any of the benefits which the population might be able to gain from the "cultural heritage" by and for themselves.

Only the Charters concerned with towns and areas made an attempt to face the practical implications of the more elemental and direct values of the 1960s and 1970s. Though these were accepted fairly rapidly in national legislation (with many of the appropriate legal and fiscal measures[39]), it has proved more difficult to find a satisfactory basis for their assessment (as will be seen in Chapter 2).

The ICOMOS *Washington Charter* for the conservation of historic towns and urban areas (1987) acknowledged the new benefits which came from being "*an expression of the diversity of societies throughout history*" and from embodying "the values of traditional urban cultures" in its preamble, but concentrated firmly on the longer-established benefits derived from having a "*role as historic documents*" in the rest of its text.

The implications of the recently accepted values on the criteria for assessment were explored by ICOMOS Brazil with its own *Petropolis (Itaipava) Charter on the Preservation and Revitalisation of Historic Centres* the same year. Urban historical sites, it is stated,

> "*may be considered as those spaces where rich and various evidence of the city's cultural production is concentrated. They should be described in terms of their operational value as "critical areas" rather than in contrast to the city's non-historical places, since the city as a whole is an historical entity.*"(I)

It continues:

> "... *urban historical sites are part of a wider totality, made up of the natural and the built environment and including the everyday living experience of their dwellers. Within this wider space, enriched with values of remote or recent origin and permanently undergoing a dynamic process of successive transformations, new urban spaces may be considered as environmental evidence in its formative stage.*"(II)

An equally interesting, but simpler and more direct analysis had been made in the Council of

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[39] See also the *Convention for the protection of the architectural heritage of Europe*, Council of Europe, 1985, and *Recommendation R(89)5 on the protection and enhancement of the archaeological heritage in the context of town and country planning operations*, Council of Europe, 1989.

Europe's *Recommendation on Urban Open Space* of 1986, which declared that:

> "*The enjoyment of open space contributes to the legitimate aspirations of urban inhabitants for an improvement in their quality of life, as well as to increased social cohesion, feelings of security and supports in this way the protection of the rights of man in the environment.*" (1.4)

National Charters

The logical outcome of the increasing value attached to cultural traditions and environmental diversity in the 1970s emerged in 1982, when the second of the national Charters - for the preservation of Quebec's heritage - was published[40]. Rather than dealing with a particular part of the environment (towns, gardens, monuments of mud brick, etc) national Charters take the individuality of their own cultural development as a starting point and as the dominant quality to be protected. Therefore the first aim of the *Deschambault Declaration* (adopted by the French-speaking Committee of ICOMOS Canada) was "*to try to identify our cultural personality, and thereby define the special nature of our heritage*":

> "... *It would be pointless to offer here an exhaustive list of all the geographic, social, historical and economic factors that have contributed to the development of our cultural fabric. Suffice it to say that this ferment of ideas, habits and customs, taking place as it did in a particular geographic context, has given rise to traditions, a folklore, a mentality, ways of doing things, and architecture, a social structure and, in sum, an art of living that is uniquely Quebecois. Though the elements that make up this culture have not all been integrated to the same degree, nor in the same way, their importance cannot be doubted. They constitute our heritage, which is nourished and strengthened by the past, and continues to flourish in the lives of the present generations. We cannot allow this dynamic growth to be cut off from its roots.*" (2)

Once again, society's adverse reaction to the effects of unrestrained consumerist ideology was observed:

> "*The postwar period has witnessed the worldwide spread of various currents of thought that seem to adjust people's way of living to new socio-economic conditions, and to criticize the consequences of industrialisation, of urbanisation on a massive scale, of progress at all costs, and of the consumer society. Whether extreme or moderate, these ideologies have helped to make people aware of certain human values that merited preservation. These things of value include the architectural, artistic or simply material remains that our predecessors have bequeathed us ...*" (1)

While Quebec, with a culture under constant threat from the potentially dominating influence

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[40]The first, the Australian *Burra Charter*, though extremely thorough in most other respects, omitted any definition of the qualities the advice was intended to conserve and the reasoning behind their proposed conservation. This has begun to be adressed in the new *Illustrated Charter*, 1994.

of English-speaking Canada, chose to identify and define the special nature of its culture at some length, the English-speaking Committee of ICOMOS Canada defined neither their culture nor the qualities being protected and "enhanced" under the terms of the *Appleton Charter*, published the year after the *Deschambault Declaration.* It is interesting to note that this Charter, with no clear rationale established against which acceptable and unacceptable action can be judged, has chosen to include the re-creation of vanished or irreversibly deteriorated resources as valid conservation action - when all other documents explicitly exclude it (see Chapter 3 for further discussion).

The most recent of the national Charters, adopted by the New Zealand Committee of ICOMOS in 1992, based its guidelines on the belief that the New Zealand peoples have particular ways of perceiving, conserving and relating to their cultural heritage. Article 1, which states the purpose of conservation, goes on to define the values being conserved clearly and simply. In general, it states, places of cultural heritage value:

[i] have lasting values and can be appreciated in their own right;
[ii] teach us about the past and the culture of those who came before us;
[iii] provide the context for community identity whereby people relate to the land and to those who have gone before;
[iv] provide variety and contrast in the modern world and a measure against which we can compare the achievements of today; and
[v] provide visible evidence of the continuity between past, present and future.

The uniqueness of the Charter lies in article 2, where the particular quality of the indigenous cultural heritage of the Maori and Moriori peoples is described at length, and the dominance of their rights over the demands of general or academic interest are specifically acknowledged.

There has been an enormous change in the perception of value during this century (so much so that the *Venice Charter* itself might soon be re-written). The benefits to be gained from protecting the "cultural heritage", as seen by the international community, are far broader, more fundamental and more populist than could have been conceived by the first "conservationists". There are possible alliances to be made and certain conflicts to resolve with the "green" lobby and the "heritage" industry, two popular issues of the last years of the twentieth century.

Scotland's own greatest challenge is to strengthen national and cultural diversity within the framework of a newly re-united Europe, and it seems appropriate to end this section with the preamble of the 3rd *Conference of European Ministers* responsible for the Cultural Heritage (1992). The Ministers affirmed "*the irreplaceable contribution which the cultural heritage, both a witness to links with the past and a source of inspiration in the future, makes to the construction of wider Europe*"; they bore in mind "*the major role which the protection and enhancement of the heritage plays in cultural, economic and social development as well as in improvement of people's surroundings*"; they noted "*the speed and scale of the political and social changes which have occurred in part of Europe as well as the emergence of new priorities and needs*"; and, finally, they recognised "*the urgent need to develop pan-European co-operation for the purposes of a joint quest for a better physical and human environment*" [41].

[41] *Resolutions of the Malta Conference*, Council of Europe, 1992.

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WHAT SHOULD BE CONSERVED?

Once the question "**why** conserve?" is answered, another question immediately arises. **What** should be conserved? Which parts of the environment give the particular advantages to society discussed in the previous chapter? And how are these benefits to be compared and assessed?

Under a variety of terms, most of the Charters list the general types of site that could have some desirable qualities and some value worth protecting (see chart at end of chapter for the broadening of categories over the years). Since today's less narrow criteria acknowledge informal as well as formal beauty, the small structure as well as the great and the new as well as the old, almost every part of the environment is, potentially, included. Almost every site has some value, even if only, for reasons of sustainability and psychological stability, because it already exists.

Whatever their value, in practice not all parts of the environment can be protected. While we might agree that, however slight, all sites have some quality of their own, whether this quality is appreciated or not is entirely another matter. Not all can be given or even want exactly the same degree of care, and thus there is a need to know more precisely where the benefits lie then to compare and quantify those sites with stronger qualities and more value than others. A decision can then be reached on the scale and type of care needed.

Forming criteria for selection is a thorny issue, and Charters tend to leave this task to others (invariably the individual national authority[42]). The characteristic most easily recognised, that simply of age, defines itself - the older the better. The means of evaluating "high" art and history have a long tradition and their qualities are perpetually being exhaustively assessed in academic circles. Despite all the changes in the perception of value, these aspects still tend to eclipse other criteria, perhaps because of the familiarity and relative simplicity of their classification. Indeed the inspectorate of most countries is predominantly composed of architectural historians. Similarly, the criteria for assessing technical and scientific qualities already exist, though the number of those who are capable of undertaking such assessments is relatively low.

The emphasis on academic rather than on what could be termed social or psychological criteria is unmistakable even in the detailed recommendations of the Council of Europe (for the twentieth-century architectural heritage, 1991). This rare example of Charters' selection criteria is based on the following considerations:

1. *the desirability of acknowledging the value of significant works taken from the whole range of styles, types and construction methods of the twentieth century;*
2. *the need to give protection not only to the works of the most famous designers in a given period or style of architecture, but also to less well-known examples which have significance for the architecture and history of the period;*
3. *the importance of including, among the selection factors, not only aesthetic aspects but the contribution made in terms of the history of technology and political, cultural,*

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[42]See the *Scottish Memorandum of Guidance*, 1993.

economic and social development;

4. *the crucial importance of extending protection to every part of the built environment, including not only independent structures but also duplicated structures, planned estates, major ensembles and new towns, public spaces and amenities;*
5. *the need to extend protection to external and internal decorative features as well as to fittings and furnishings which are designed at the same time as the architecture and give meaning to the architect's creative work.* (II.1)

Whilst it is easy to see how the aesthetic aspects and the contribution made in terms of the history of technology can be recognised, it is less easy to understand how the contribution of political, cultural, economic and social development might be appreciated without further guidance. These are the most difficult aspects to define; the "*human and social*" qualities which add to "*the well-being of peoples*", which form a "*corner-stone of identity*", in fact all the values that were identified in the 1960s and 70s.

Such amorphous characteristics are at their strongest in the value of towns and areas, and Charters concerned with their protection are among the few to provide a list of factors to be assessed. The ICOMOS *Washington Charter* (1987) includes for especial notice:

a. *the urban patterns as defined by lots and streets;*

b. *the relationships between buildings and green and open spaces;*

c. *the formal appearance, interior and exterior, of buildings as defined by scale, size, style, construction, materials, colour and decoration;*

d. *the relationship between the historic town and its surrounding natural and man-made setting;*

e. *the roles that an historic town has acquired over time.* (2)

These elements which help create "*the historic character of the historic town*", that is part of the values which the Charter wishes to preserve, are noticeably more "material" (a, b, c and d) than "spiritual" or social (e?).

The one Charter that does give a new basis for comparative analysis is concerned with urban open spaces (Council of Europe, 1986), significantly an area where the assessment of value is forced away from the familiar aesthetic yardsticks of architectural history. In this recommendation, there are signs of a radical change in approach; above all, the intent appears to be to evaluate every site on its own terms; to "take stock" of the existing resources without bias rather than judge against either a check-list of rarity or an ideal norm set by aesthetics, social history and technological achievement etc. This requires first that "*everything is done to encourage all [involved] ... to try to understand more clearly what activities are actually going on in these areas*" (2.1). And, unusually, the document gives detailed guidance on how this might be done, of which the most innovative is the requirement of,

> "... *close, often systematic, observation of the uses which a community makes of its existing space resources. It will require recognition and an understanding of their patterns of behaviour, including notions of responsibility ...*" (2.2)

The next year (1987), the *Petropolis (Itaipava) Charter* on the preservation and revitalisation of historic centres not only defined the main purpose of "preservation" (in the *Burra Charter*'s meaning of "conservation"[43]) as "*the maintenance and enhancement of reference patterns needed for the expression and consolidation of citizenship*" (iv), but also enlarged the process of analysis and evaluation:

> "*The participation of the community in inventorying is revealing as to the value it attaches to the property relevant and stimulates its concern as regards such property.*"

Despite these forerunners, the acknowledgement of the social component of cultural value in a meaningful way is still in its early stages. Acknowledging and assessing the "spiritual" or "psychological" component might be said to have started only last year (1994), with the *Nara Document on Authenticity*. For the effect these new criteria will have on the way quality is assessed, on **what** should be conserved, we will probably have to wait for the new century to see.

Chart of Terms used to describe Protected Sites

Chronological order has been maintained where possible so that the broadening of the range of sites under the term can be observed and compared to the developing attitudes to value discussed in Chapter 1.

GENERAL DEFINITIONS

1954 **CULTURAL PROPERTY**	1968 **CULTURAL PROPERTY**	1972 **CULTURAL and NATURAL PROPERTY**
"**Cultural property** shall cover, irrespective of origin or ownership: a. movable or immovable property of great importance to the cultural heritage of every people, such as monuments of architecture, art or history, whether religious or secular; archaeological sites; groups of buildings which, as a whole, are of historical or artistic interest; works of art; manuscripts, books, and other objects of artistic, historical, or archaeological interest; as well as scientific collections and important collections of books and archives or of reproductions of the property defined above; b.	"For the purpose of this recommendation, the term **cultural property** applies to: a. Immoveables, such as archaeological and historic or scientific sites, structures or other features of historic, scientific, artistic or architectural value, whether religious or secular, including groups of traditional structures, historic quarters in urban or rural built-up areas and the ethnological structures of previous cultures still extant in valid form. It applies to such immoveables constituting ruins existing above the earth as well as to archaeological or historic remains found within the earth. The term cultural property also	"**Cultural and natural property** is that which forms part of the cultural and natural heritage" **cultural heritage** consists of: - "monuments: architectural works, works of monumental sculpture and painting, elements or structures of an archaeological nature, inscriptions, cave dwellings and combinations of features, which are of outstanding universal value from the point of view of history, art or science. - groups of buildings: groups of separate or connected buildings which, because of their architecture, their homogeneity or their place in the landscape, are

[43]The problems of translating subtle and unfamiliar concepts by transliteral substitution are very evident in this Charter's English version, which should be revised as soon as possible.

buildings whose main and effective purpose is to preserve or exhibit the movable cultural property defined in sub-paragraph [a] such as museums, large libraries and depositories of archives, and refuges intended to shelter, in the event of armed conflict, the movable cultural property defined in sub-paragraph [a];
c.
centres containing a large amount of cultural property as defined in sub-paras [a] and [b], to be known as "centres containing monuments" ([1] UNESCO, *The Hague Convention*, 1954.)

includes the setting of such property;
b.
movable property of cultural importance including that existing in or recovered from immovable property and that concealed within the earth, which may be found in archaeological or historical sites or elsewhere. (preamble [I.1])

The term **cultural property** includes not only the established and scheduled architectural, archaeological and historic sites and structures, but also the unscheduled or unclassified vestiges of the past as well as artistically or historically important recent sites and structures". (preamble [I.2], UNESCO *Recommendation*, 1968.)

of outstanding universal value from the point of view of history, art or science.
- sites: works of man or the combined works of nature and of man, and areas including archaeological sites which are of outstanding universal value from the historical, aesthetic, ethnological or anthropological point of view." ([1], UNESCO *Convention*, 1972)

(The UNESCO *Convention on the means of prohibiting and preventing the illicit import, export and transfer of ownership of cultural property* (1970) has a more extensive definition of movable **cultural property**.)

1979 **CULTURAL SIGNIFICANCE**, [sites of].
"Cultural significance means aesthetic, historic, scientific or social value for past, present or future generations." ([1.2], ICOMOS Australia, *Burra Charter*, 1979)

1992 **CULTURAL HERITAGE VALUE**, [sites of].
"Cultural heritage value means possessing historical, archaeological, architectural, technological, aesthetic, scientific, spiritual, social, traditional or other special cultural significance, associated with human activity." ([22], ICOMOS *New Zealand Charter*, 1992)

THE BUILT ENVIRONMENT

1956 **ARCHAEOLOGICAL HERITAGE**

For the purpose of the present Recommendation, by **archaeological excavations** is meant
any research aimed at the discovery of objects of archaeological character, whether such research involves digging of the ground or systematic exploration of its surface or is carried out on the bed or in the subsoil of inland or territorial waters of a Member State. (art I.1)

The provisions of the present Recommendation apply to any remains, whose preservation is in the public interest from the point of view of history or art and architecture, each Member State being free to adopt the most appropriate criterion for assessing the public interest of objects found on its territory. ... (preamble [I.2], UNESCO New Delhi, 1956)

1989 **ARCHAEOLOGICAL HERITAGE**

The **archaeological heritage** is
that part of the material heritage in respect of which archaeological methods provide primary information.
It comprises all vestiges of human existence and consists of places relating to all manifestations of human activity, abandoned structures, and remains of all kinds
(including subterranean and underwater sites), together with all the portable cultural material associated with them. ([1], ICOMOS *Archaeological Charter*, 1989)

1966 **HISTORIC MONUMENT**

"The concept of an historic monument embraces not only the single architectural work but also the urban or rural setting in which is found the evidence of a

1975 **ARCHITECTURAL HERITAGE**

"The European **architectural heritage** consists not only of our most important monuments: it also includes the groups of lesser buildings in our towns and

particular civilisation, a significant development or an historic event. This applies not only to great works of art but also to more modest works of the past which have acquired cultural significance with the passing of time". ([1], ICOMOS *Venice Charter*, 1966)

characteristic villages in their natural or manmade settings.

... Today it is recognised that entire groups of buildings, even if they do not include any example of outstanding merit, may have an atmosphere that gives them the quality of works of art, welding different periods and styles into a harmonious whole. Such groups should also be preserved. ..." ([1], Council of Europe *Amsterdam Charter*, 1975)

1976 **HISTORIC and ARCHITECTURAL (including VERNACULAR) AREAS**

"Historic and architectural (including vernacular) areas shall be taken to mean any groups of buildings, structures and open spaces including archaeological and paleontological sites, constituting human settlements in an urban or rural environment, the cohesion and value of which, from the archaeological, architectural, prehistoric, historic, aesthetic or socio-cultural point of view are recognised.

Among these **areas**, which are very varied in nature, it is possible to distinguish the following in particular: prehistoric sites, historic towns, old urban quarters, villages and hamlets, as well as homogeneous monumental groups, it being understood that the latter should as a rule be carefully preserved unchanged." ([I.1a], UNESCO *Nairobi Convention*, 1976)

1985 **ARCHITECTURAL HERITAGE**

"The expression **architectural heritage** shall be considered to comprise the following permanent properties:

1. Monuments: all buildings and structures of conspicuous historical, artistic, scientific, social or technical interest, including their fixtures and fittings.
2. groups of buildings: homogeneous groups of urban or rural buildings conspicuous for their historical, artistic, scientific, social or technical interest which are sufficiently coherent to form topographically definable units.
3. sites: the combined works of man and nature, being areas which are partially built upon and sufficiently distinctive and homogeneous to be topographically definable and are of conspicuous historical, archaeological, artistic, scientific, social or technical interest." ([1], Council of Europe *Convention*, 1985)

THE NATURAL ENVIRONMENT

1962 **The BEAUTY and CHARACTER of LANDSCAPES and SITES**

"the safeguarding of **the beauty and character of landscapes and sites** is taken to mean, the preservation and, where possible, the restoration of the aspect of natural, rural or urban landscapes and sites, whether natural or man-made, which have a cultural or aesthetic interest or form typical natural surroundings." (preamble [I.1])

"Protection should not be limited to natural landscapes and sites, but should also extend to landscapes and sites whose formation is due wholly or in part to the work of man. ..." (preamble [II.5], UNESCO 1962)

1972 **NATURAL HERITAGE**

"Natural heritage [consists of]:

- natural features consisting of physical and biological formations, which are of outstanding universal value from the aesthetic or scientific point of view;
- geological and physiographical formations and precisely delineated areas which constitute the habitat of threatened species of animals or plants of outstanding universal value from the point of view of science or conservation;
- natural sites or precisely delineated natural areas of outstanding universal value from the point of view of science, conservation or natural beauty." ([2], UNESCO 1972)

1981 **HISTORIC SITE**

"An **historic site** is a specific landscape associated with a

1981 **HISTORIC GARDEN**

"An **historic garden** is an architectural and horticultural composition of

1981 **LIVING MONUMENT**

"The historic garden is an architectural composition whose

memorable act, as, for example, a major historic event; a well-known myth; an epic combat; or the subject of a famous picture." ([8], ICOMOS *Florence Charter* 1981)

interest to the public from the historical or artistic point of view. As such, it is to be considered as a monument (article 1).

The term *historic garden* is equally applicable to small gardens and to large parks, whether formal or "landscape" (article 6).

Whether or not it is associated with a building - in which case it is an inseparable component - the *historic garden* cannot be isolated from its own particular environment, whether rural, artificial or natural." ([7], ICOMOS *Florence Charter* 1981).

constituents are primarily vegetal and therefore living, which means that they are perishable and renewable. Thus its appearance reflects the perpetual balance between the cycle of the seasons, the growth and decay of nature and the desire of the artist and craftsman to keep it permanently unchanged." ([2], ICOMOS *Florence Charter* 1981)

OTHER

1982 **Human and Social Treasure.**

"... the people in their environment, who have their own customs and traditions, whose memory is furnished with a particular folklore, and whose way of living is adapted to this specific setting, are a human and social treasure that also requires protection." ([3], ICOMOS *Deschambault Declaration*, 1982)

3

THE DEFINITION OF TERMS

There sometimes seems no end to the ways of describing the protection of the environment; conservation, preservation, restoration, reconstruction and many more, all are common words, heard everyday in casual conversations. To the public one is much the same as another and because of this each word conveys very little, just a hazy image of something to do with old buildings, tinged with approval or disapproval depending on the individual.

For those responsible for protecting the environment, the confused and confusing use of terms can cause great problems. Conservation work is always based on subtle and sophisticated ethical issues and, to deal with these, must have a common vocabulary which is capable of being used with care and precision. To cut through the general confusion, many of the ICOMOS Charters have established their own definitions of the more frequently used terms. They have created, in effect, a working vocabulary where every term forges a tight link between ethics and work on site. With this common language, it becomes possible to set a standard for the success of conservation work and to communicate its criteria simply, clearly, and with the least opportunity for misunderstanding.

Of all the Charters, the Australian *Burra Charter* has the clearest, most unambiguous definition of nearly all terms as well as a plain statement of principles (followed closely by New Zealand's *Auckland Charter*). The *Venice Charter* is less exact in its definitions but there are clear implications of very rigorous and consistent principles in its prescriptive courses of action[44].

All Charter definitions of each term are quoted here for comparison and, throughout this work, all terms will be used with these meanings in mind. The more detailed guidelines for action under these terms will be found in Chapter 6.

ADAPTION
Burra Charter, 1.9, 1.10; New Zealand Charter 22.

Adaption means "*modifying a place to suit proposed compatible uses*".

ANASTYLOSIS
Venice Charter, 15; New Zealand Charter 22.

Anastylosis means "*the re-assembling of existing but dismembered parts*".

AUTHENTICITY
Shorter Oxford English Dictionary.

Authenticity is defined as "*being true in substance, as really proceeding from its reputed source or author*".

COMPATIBLE USE
Burra Charter, 1.10

Compatible use means *"a use which involves no change to the culturally significant fabric, changes which are substantially reversible, or changes which require a minimal*

[44]Even the *Athens Conference* of 1931 although not using the word **conservation** was virtually predicting the definitions which would be used by its successors sixty years later: "... the Conference noted that there predominates in the different countries represented a general tendency to abandon restorations *in toto* and to avoid the attendant dangers by initiating a system of regular and permanent maintenance calculated to ensure the preservation of buildings." (art.I)

impact".

CONSERVATION
Burra Charter, 1.4; New Zealand Charter, 22.

Conservation means "*all the processes of looking after a place so as to retain its cultural significance. It includes maintenance and may according to circumstance include preservation, restoration, reconstruction, and adaption and will be commonly a combination of more than one of these.*

Washington Charter, preamble 4.

The **Conservation** of historic towns means "*those steps necessary for their protection, restoration, as well as their development and harmonious adaption to contemporary life*".

Education Guidelines 3.

"*The object of **Conservation** is to prolong the life of cultural heritage and, if possible, to clarify the artistic and historical messages therein without the loss of authenticity and meaning*".

Note: although **conservation** is the key activity of all charters, remarkably few define its meaning. Many refer to it frequently as an activity distinct from **preservation** and **restoration** without explanation, while some pre-1980 Charters employed all three terms interchangeably. This resulted in such ambiguity of meaning and intent that their recommendations had little or no use in practice.

CONSOLIDATION

see SAFEGUARDING.

C U L T U R A L HERITAGE
UNESCO, Draft Medium Term Plan, 1989.

"***Cultural Heritage** may be defined as the entire corpus of material signs - either artistic or symbolic - handed on by the past to each culture and, therefore, to the whole of humankind. As a constituent part of the affirmation and enrichment of cultural identities, as a legacy belonging to all humankind, the cultural heritage gives each particular place its recognizable features and is the storehouse of human experience.*"
See also HERITAGE.

ENHANCEMENT
Appleton Charter, C.

Enhancement; "*The activities of removal or addition are characteristic of measures of **enhancement** of the heritage resource*".

Note: though many Charters use the term **enhancement**, only the *Appleton Charter* attempts to define it. Its guidelines for the activity are given under different terms (as noted) in other Charters.

HERITAGE
Deschambault Declaration, 1982.

Heritage is defined as "*the combined creations and products of nature and of man, in their entirety, that make up the environment in which we live in time and space. Heritage is a reality, a possession of the community, and a rich inheritance that may be passed on, which invites our*

recognition and our participation".
See also CULTURAL HERITAGE.

PATINA

Patina is the alteration to the surface of a material through the effects of time or weathering, that adds to or replaces the quality of the original finish.

PRESERVATION
Burra Charter 1.6; New Zealand Charter 22.

Preservation is the action taken to maintain "*the fabric of a place in its existing state*" and to retard deterioration.

Appleton Charter, B.

Preservation is the "*retention of the existing form, material and integrity of site*".

Note: **Preservation** is also known in some Charters as **stabilisation**.

RECONSTRUCTION
Burra Charter, 1.8; New Zealand Charter 22.

Reconstruction means returning a place as nearly as possible to a known earlier state and is distinguished by the introduction of materials (new and old) into the fabric.

RE-CREATION
New Zealand Charter, 13.

Re-creation means *the conjectural reconstruction of a place.*

Note: all Charters are unanimous in their refusal to consider conjectural reconstruction or **re-creation** as an acceptable action within the terms of conservation, except for the *Washington Charter* which merely "discourages" alterations that have no historical basis and which seek to create an earlier appearance (Appendix 3). ICOMOS Canada once again has its own unique term - **period reconstruction** - which it defines as the **recreation** of vanished or irreversibly deteriorated resources (1983 Appleton Charter [B]). In accordance with the other Charters, it limits action which involves "the recovery or **recreation** of earlier forms ... to those forms which can be achieved without conjecture" (Section D). The *Florence Charter* makes the reasons for such rejection quite clear: "Where a garden has completely disappeared or there exists no more than conjectural evidence of its successive stages a reconstruction could not be considered an historic garden." (art.17)

REHABILITATION
Appleton Charter, B.

Rehabilitation is the "*modification of a resource to contemporary functional standards which may involve adaption for new use*".

REPLICATION
New Zealand Charter, 13.

Replication means "*to make a copy of an existing place*".

Note: there is a tendency to confuse the terms **replication** and **reconstruction**. Both are actions which try to reproduce work which no longer exists, but while **reconstruction** should always be identifiable as new work, **replication** attempts to form an exact copy and is therefore intrinsically deceptive in intent and very damaging to the site's authenticity. This is similar to the ethical and legal distinction made between a forgery and a marked copy of an artwork. The *New Zealand Charter*, the only one to refer to **replication**, does so specifically to exclude such action from the scope of a conservation Charter.

RESTORATION
Burra Charter 1.7; New Zealand Charter 22.

Restoration means "*returning the existing fabric of a place to a known earlier state by removing accretions or by reassembling existing components without the introduction of new material*".
See also ANASTYLOSIS.

Note: there is a related term unique to ICOMOS Canada, which comes with its own rather unhelpful definition: **Period restoration** is "the recovery of an earlier form, material and integrity of site" (Art.B, Appleton Charter, 1983).

RE-USE

See ADAPTION.

SAFEGUARDING
UNESCO Nairobi Recommendation, 1c.

"***Safeguarding*** *shall be taken to mean the identification, protection, conservation, restoration, renovation, maintenance and revitalisation of historic or traditional areas and their environment*".

Note: the very open-ended action of **safeguarding** is distinguished from the more detailed requirements of **conservation** in the *Appleton Charter* and in UNESCO's *Conventions*. In most Charters, **safeguarding** is described as **conservation**.

STABILISATION
Burra Charter, 12 [note].

Stabilisation *"is a process which helps keep fabric intact and in a fixed position*".

Appleton Charter, B; New Zealand Charter 22.

Stabilisation *"is a periodic activity to halt deterioration and to put the existing form and materials of a site into a state of equilibrium, with minimal change*".
See also PRESERVATION.

SUSTAINABLE DEVELOPMENT
World Commission on Environment and Development, 1987.

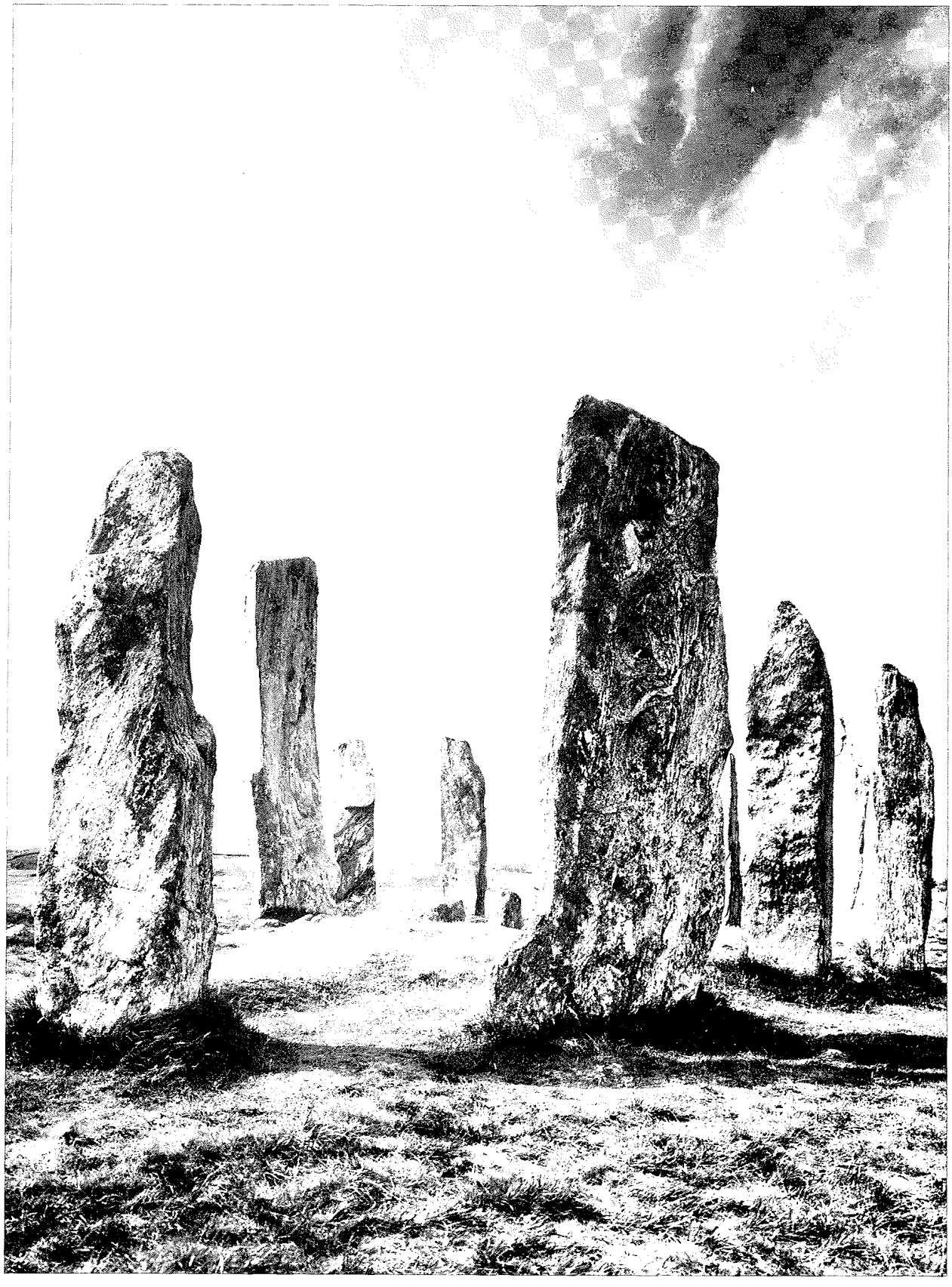
Sustainable development is that which "*meets the needs of the present without compromising the ability of future generations to meet their own needs.*"

UTILISATION

See ADAPTION.

VERNACULAR ARCHITECTURE
CIAV-ICOMOS Thessaloniki Charter, p.1, 1992.

"***Vernacular architecture*** *is the expression of the historic and authentic values recognised by a community which respond directly to the needs of the cultural, physical and economic environment. ...*
Vernacular architecture *is an architecture of a locality or a region. Its structure, form and constructional materials are determined by the local climate, the geology, the geography, the economy and culture*".



1. The Standing Stones at Callanish

(**4.7** Inseperable Bond with Setting)

2. Arnol Black House, Isle of Lewis

(**5.4** The Public Contribution)

No one understands a building as well as the people who built and live in it, but now only a few are left to remember the traditicnal way of life in the Highlands and Islands of Scotland. Their help is essential if the purpose and construction of the remaining buildings are to be fully appreciated.

4

CONSERVATION ETHICS

All conservation work as recommended by the Charters is founded on a few strong principles. Principles of any kind arise from an underlying perception of value and, as Chapter 1 outlined, the greatest value of any site for society is rarely just the fabric itself, in its form as a collection of re-usable stones and mortar. Its true worth nearly always lies in the site's less tangible qualities; that is to say, in the phrase most Charters now use to emphasise the point, its "cultural significance".

When action to **conserve** a building begins, the one and only purpose behind the work is to safeguard the site's value and to protect society's interest. The main aim is not the maintenance of the fabric as is often thought, though maintenance is an essential part of the process. The aim should be to protect the "cultural significance" by maintaining the fabric, to find a way of conserving the physical form which does the least damage to its qualities under protection[45].

Some of the more valuable characteristics are very easily crushed. For example, if historical evidence is tampered with or if the work of a unique and rare genius in art and craft is "touched up" by someone else however skilled, their greatest value may be destroyed; the evidence is no longer reliable and the artistic merit is dulled. Through loss of authenticity, the works themselves have become comparatively worthless even though most of the fabric itself has been saved.

Working from ***why*** we conserve to ***what*** we conserve and finally to ***how*** we conserve it, a few factors have been found to be crucial. These form the ethical backbone of conservation work. The concepts themselves, such as "authenticity" and "sustainability", can be very subtle, their full implications often difficult to disentangle in a particular case, but the criteria, such as "minimal intervention", are simple to understand and simple (in principle) to carry out. Both concepts and criteria have had (and are still having) a major effect on the conservation debate.

Each ethical factor has been illustrated by the words of one Charter. Other relevant Charter articles are referred to below the main source. Numbers in square brackets indicate the relevant article. All are ICOMOS Charters unless otherwise noted.

CONCEPTS

4.1 AUTHENTICITY (Non-distortion of evidence)

Shorter Oxford English Dictionary.

Authenticity - defined as being true in substance, as really proceeding from its reputed source or author - is recognised as the one quality above all probably most essential to the

[45]A strong analogy can be made with the ethics of medical care, eg, treatment which maintains one of the functions of the physical body would not be carried out if the personality and intelligence of the individual might be harmed by doing so.

value of sites of great cultural significance. Without it, their worth as historic documents, as great works of art and as national symbols is deeply compromised.

1964 Venice Charter [first para.].
See also;
1975 Plovdiv Vernacular Charter [v],
1982 Deschambault Declaration, [II-D]).

"Imbued with a message from the past, the historic monuments of generations of people remain to the present day as living witnesses of their age-old traditions. ... The common responsibility to safeguard them for future generations is recognised. It is our duty to hand them on in the full richness of their ***authenticity****."*

1994 Nara Document [10].

"Authenticity ... appears as the essential qualifying factor concerning values."

Authenticity is not an easy concept. Each part of a site's development is **authentic** in its own right, as a reflection of its time (though not necessarily of the original period of building), as well as an **authentic** part of the whole - the site as it stands today, an aged human artifact with perhaps centuries of mankind's use imprinted in its fabric. This too is acknowledged by the Charters.

1982 Declaration of Dresden [4].
See also;
4.6 Respect for the contributions of all periods.

"Since men have been influenced by the wartime destruction ... fresh emphasis has been placed on the demand to preserve the original substance of the monument. By this is meant that substance which ... has grown through the ages, and which, by virtue of its authenticity, confirms the origins of the monument and its historic evolution up to the present day."

Note: "original" and **authentic** material are not necessarily the same. All original fabric is **authentic** but not all **authentic** fabric is original. The area of **authenticity** must always be defined, then carefully and explicitly evaluated, as conflict may arise between the conservation of a totally **authentic** (in that no part of the site's existence has been counterfeited or eradicated) but aesthetically or historically imperfect whole, and its **restoration** by removal of accretions, or **reconstruction**. Both processes potentially gain a greater aesthetic or "period" consistency at the cost of the **authentic** record of the site's existence, and its **authentic** present state of survival. Before such decisions can be made, the different facets of the site's value to society must be defined and appraised so that, as far as possible, the plan of action clearly result in much greater gain than loss of cultural significance. (See **5.5 Statement of Cultural Significance**.)

It has been argued that emotionally, intellectually and aesthetically, a site has infinitely greater value to society when its appeal to the emotions, the intellect and the senses is **authentic**, however altered by the passing of time, than when, in some way, these qualities have been manufactured or artificially induced. Cultural significance is, in effect, a **non-renewable resource**.

1975 Council of Europe European (Amsterdam Charter) [3].

"The architectural heritage is a capital of irreplaceable spiritual, cultural, social and economic value. Each generation places a different interpretation on the past and derives new inspiration from it. This capital has been built up over centuries; the destruction of any part of it leaves us poorer since nothing new that we create, however fine, will make good the loss."

With this in mind, the Charters recommend the most stringent efforts to indicate clearly a difference between **authentic** and extraneous material that may have had to be introduced to support the integrity of the whole (see **4.11 Legibility**).

1982 Florence Charter [13].

"The date of any complete replacement must be indicated."

Note: the 1989 ICOMOS Archaeological Charter states that reconstructions should avoid disturbing any archaeological evidence, and should take account of evidence from all sources in order to achieve **authenticity** [7]. While this Charter does not define **authenticity**, under the above circumstances it is impossible for its meaning of **authenticity** to conform to that of other Charters.

The **authenticity** of some aspects of "cultural significance" is easily assessed, eg age (fabric is either original to a specific period or it is not), but when different aspects are combined the question of **authenticity** becomes less answerable, eg at what point in time does a copy (or even a deliberate fake) acquire its own **authenticity** not as the original but as itself for the illusory perhaps but genuine symbolic or emotional value it has built up over the years? Charters acknowledge these and other difficulties and, as the first part of a continuing process, a conference (Nara, 1994) has recently been held to examine these in full.

1994 Nara Document [11].

"It is ... not possible to base judgements of value and authenticity on fixed criteria. On the contrary, the respect due to all cultures requires that the heritage properties must be considered and judged within the cultural contexts to which they belong."

4.2 CONJECTURE (The need for incontestable evidence)

Because the Charters agree on the primary importance of **authenticity** to a site's emotional, intellectual and aesthetical values, it follows that all action which professes to clarify or enhance these values must be based on incontestable evidence. Any **restoration** or **reconstruction** work that

justifies itself as being an exact replacement or continuation of the **authentic** whole, but which cannot be verified (ie, is **conjectural**) is potentially deceptive; a modern counterfeit replaces the genuine qualities of age. Such **conjectural** work would falsify both the original intention (and therefore the benefits that can be gained from its traces) and the qualities acquired during the site's entire existence.

1979 Burra Charter [14].
See also;
1964 Venice Charter [9].
1982 Deschambault Declaration, [V-C].
1982 Florence Charter [16].
1983 Appleton Charter [D].
1992 New Zealand Charter [19],
and,
6.9 **Restoration** and
6.11 **Reconstruction**.

"[Restoration] *is based on respect for all the physical, documentary and other evidence and stops at the point where* ***conjecture*** *begins.*"

4.3 INTEGRITY

Shorter Oxford English Dictionary

In their use of the concept of **integrity**, the Charters combine both its purely physical and the more "moral" meanings; ie "material wholeness", "soundness" and "uncorrupted character". By doing this, they emphasise the need for the professional analysis of a very specific problem **always** to be re-assessed in terms of the much broader values and needs of the site as a whole. Similarly any suggested professional resolution of a specific problem, however admirable in its own terms, should **never** be accepted unless it is equally admirable in terms of its effect on the site's "cultural significance" (see also **5.1 Integrated Conservation**).

Structural and technological integrity;

1983 Appleton Charter [D].

- "*must be respected and will require attention to performance as well as to appearance.*"

Social integrity;

1982 Deschambault Declaration [IX].

- "*The preservation of the dynamic and functional character of our heritage is ensured by local residents who are an integral part of that heritage and contribute to its protection and its vitality.*"

Spatial integrity;

1987 Petropolis Charter [VI].

- "*The preservation of urban historical sites must be ... seen as a continuous and permanent process, supported by a proper understanding of those mechanisms that generate and influence the formation of spatial structures.*"

Aesthetic integrity;

1983 Appleton Charter [D].

- *"New work should be identifiable on close inspection or to the trained eye, but should not impair the aesthetic integrity or coherence of the whole."*

See also;
6.2 Design of new works.

Contextual integrity;

1964 Venice Charter [14].

- *"The sites of monuments must be the object of special care in order to safeguard their integrity..."*

1965 Council of Europe Barcelona Symposium [p.26].

- protected areas *"can be surrounded by scientifically, aesthetically, historically and ethnologically interesting or uninteresting outer areas which are instrumental in framing the character of the main areas"*

See also;
4.7 Inseparable bond with setting.

special case:

1982 Deschambault Declaration [II-D].

"When only small elements of [the national] heritage remain, these must be treated as integral wholes".

4.4 PATINA

Patina was first used in its present day meaning in the eighteenth century, as a word for the usually green film or incrustation produced by oxidisation on old bronze. Its use quickly spread to similar chemically induced surface alterations of other materials - eg lead, copper and glass - then to alterations produced less by a chemical reaction and more to use and wear - eg the darkened, worn appearance of old furniture. It was soon recognised that **patination** by chemical reaction had protective properties and **patination** by age or wear both aesthetic and historic quality that helped testify to the **authenticity** of the object.

1983 Appleton Charter [D].

"Patina forms part of the historic integrity of a resource, and its destruction should be allowed only when essential to the protection of the fabric. Falsification of patina should be avoided."

4.5 RIGHTS OF THE INDIGENOUS COMMUNITY

In making any assessment of the meaning ("cultural significance") of a site and therefore its value to society, there is an area of possible conflict between its strong personal associations for the local community and its more intellectual and impersonal value for the world at large. An example on a grand scale might be the difference between the associations the Auschwitz camp has for survivors and for

social historians. In Scotland a similar but more local debate is continuing on the validity of proposals to turn clearance villages into "heritage" centres. From an impersonal viewpoint it is a worthy educational project of economic value; from the more personal view of the descendants of those involved it is completely offensive. As yet, though UNESCO and the Council of Europe refer to the problem, only ICOMOS New Zealand has seriously tackled the issue.

1992 New Zealand Charter,

Indigenous conservation "*is conditional on decisions made in the indigenous community, and should proceed only in this context. Indigenous conservation precepts are fluid and take account of the continuity of life and the needs of the present as well as the responsibilities of guardianship and association with those who have gone before. In particular, protocols of access, authority and ritual are handled at local level. General principles of ethics and social respect affirm that such protocols should be observed.*"

The next two concepts, in the light of previous comments, are self-explanatory.

4.6 RESPECT FOR THE CONTRIBUTIONS OF ALL PERIODS

1964 Venice Charter [11].
See also,
1931 Athens Conference [I],
1979 Burra Charter [3,note] + [5] + [16],
1982 Florence Charter [16],
1982 Desch. Decl. [IV-B],
1992 New Zealand Charter [5] and,
Introduction pp.2,3,
6.9 Restoration.

"*The valid contributions of all periods to the building or monument must be respected, since unity of style is not the aim of restoration.*"

4.7 INSEPARABLE BOND WITH SETTING

1964 Venice Charter [7].
See also,
1979 Burra Charter [8] + [9],
1981 Florence Charter [7],
1983 Appleton Charter [C],
1989 Archaeol. Charter [6],
1992 New Zealand Charter [6] and,
6.5 Treatment of Context,
6.15 Relocation.

"*A monument is inseparable from the history to which it bears witness and from the setting in which it occurs.*"

For all the above reasons and in the interests of **all** the possible qualities of a site, from the immense values of a national monument to the very basic reusable value of a common tenement, ethical action is based on the following criteria:-

4.8 **MINIMAL INTERVENTION** (or conservative repair)

1979 Burra Charter [3].
See also;
1992 N Zealand Charter [4iii],
1993 (draft) Code of Ethics [9].

"Conservation is based on a respect for the existing fabric and should involve the least possible physical intervention."

4.9 **MINIMAL LOSS OF FABRIC**

1992 N. Zealand Charter [4ii].
See also,
1982 Desch. Decl. [V-C].

"Conservation should show the greatest respect for, and involve the least possible loss of, material of cultural heritage value."

4.10 **REVERSIBILITY**

1983 Appleton Charter [D].
See also;
1979 Burra Charter [1.10]
1982 Desch. Decl. [II-D] + [VIII-C],
1993 (draft) Code of Ethics [12] and,
6.1 **Techniques.**

"The use of reversible processes is always to be preferred to allow the widest options for future development or the correction of unforeseen problems, or where the integrity of the resource could be affected."

4.11 **LEGIBILITY** (of new work)

1964 Venice Charter [12].
See also;
1979 Burra Charter [19] + [3].
1983 Appleton Charter [D],
1993 (draft) Code of Ethics [10] and,
4.3 **Integrity** (Aesthetic),
6.3 **New Design**
6.16 **Removal of parts,**
6.9 **Restoration.**

"Replacements of missing parts must ... be distinguishable from the original so that restoration does not falsify the artistic or historic evidence."

4.12 **SUSTAINABILITY**

1995 Council of Europe Segesta Colloquy [p.3].
See also,
1993 Education Guidelines [2].

"sustainable development [is a key concept] - *the point being to make sure that current use of the heritage, which is desirable, does not destroy the chances of handing it down to future generations."*

5

GUIDELINES FOR THE FUNDAMENTAL COURSES OF ACTION

Some operations must **always** be carried out when a site is about to be conserved. They are fundamental to the process, whatever the circumstances and whatever the particular problems may be, and no sound work can be accomplished without them.

Before considering these basic activities, first the context in which they should be carried out is set in section **5.1**. Unlike the others sections of this chapter, it does not describe an action as such, but rather a model for professional and public co-operation during the conservation process.

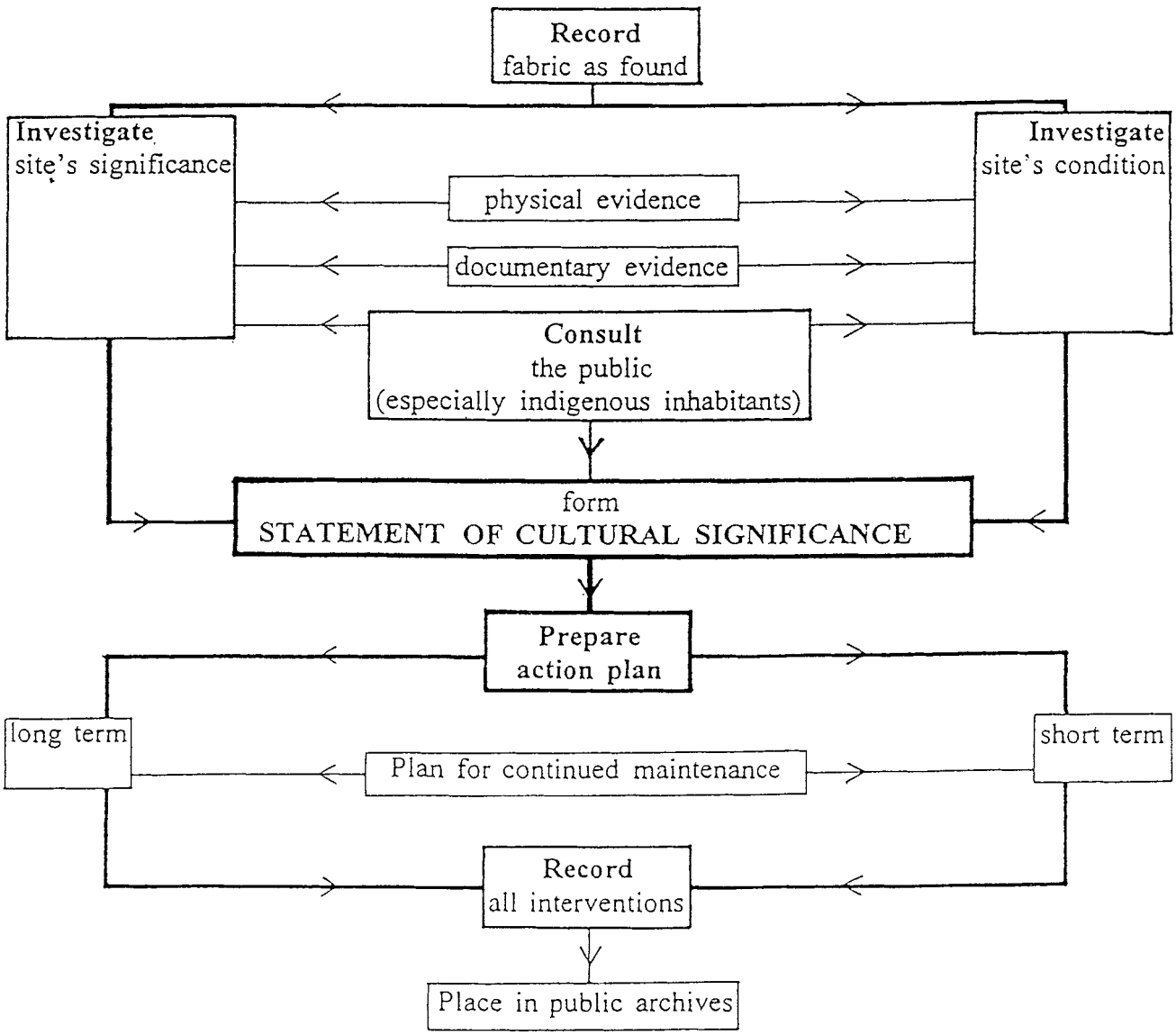


fig. 1. Diagram of basic conservation activities

Guidelines to each approach have been synthesised from the sources referenced and, while every Charter referenced gives its clear support to the major substance of the guideline, each may contain its own minor variations in addition to the central theme. As in the previous Chapter, all are ICOMOS Charters unless otherwise noted.

5.1 INTEGRATED CONSERVATION

Integrated conservation is a term which has only recently come into general use. Its meaning is still very flexible, but invariably refers to one or more of the following areas:

1987 Washington Charter [5],
1982 Declaration of Tlaxcala [1].

5.1**a**. The integration of professional expertise on the varied aspects of cultural significance - including architecture, technology, archaeology, history, sociology and economics.

1931 Athens Conference [VIIa], 1931;
1985 C. of E. Charter [8].

5.1**b**. The integration of expertise on the varied components to be conserved within the building so that the site is considered as a whole not as disparate parts.

1982 Deschambault Declaration [VII-A],
1982 Declaration of Tlaxcala [2a].

5.1**c**. The integration of the opinions and wants of the inhabitants into the action plan (see **5.4**), and the integration of the site into the activities of its surrounding community. (This will be discussed in Chapter 8.)

1975 Plovdiv Resolutions [iii],
1975 Council of Europe Charter [8];
1975 Bruges Rec.s [5ii];
1976 Charter of Cultural Tourism;
1982 Decl. of Tlaxcala [6a];
1987 Washington Charter [1];
1987 Petropolis Charter [VII];
1982 Florence Charter [23];
1985 Council of Europe Convention [10];
1989 Archaeological Charter [2].

5.1**d**. The integration of protection and protectivist aims into the policy of economic and social development and of urban and regional planning. (This will be discussed in Chapter 7.)

Whatever the particular area of interest, all Charters lay stress on the interdependence of the many facets of conservation work. No part of a building can be usefully considered in isolation from the rest of the fabric, no building can be evaluated without including its use and its inhabitants and no site is unaffected by the sometimes contradictory demands of society. All Charters underline the need for those involved in work on protected sites not only to have sufficient expertise and experience of their own discipline but to be able to appreciate problems outwith it and to ask for and accept the expertise of others.

Having set the context, the Charters then recommend that the **conservation** work should proceed by the following steps.

5.2 RECORDING OF FABRIC AS FOUND

1979 Burra Charter [23],
1983 Appleton Charter [D],
1989 Archaeological Charter,
1992 N. Zealand Charter [3i],
1993 Code of Ethics [6],
1996 Sophia Principles.

5.2**a**. Before any intervention, the physical features of a site should be fully recorded
and
5.2**b**. placed in a public archive.

5.3 INVESTIGATION OF EVIDENCE

The evidence of **cultural value** comes from the comparative quality of a mixture of different factors over a site's entire existence: the evolution of [a] its construction; [b] its aesthetic; [c] its use (and associations); [d] its context; and [e] the present condition of all these.

Though the investigation of each particular aspect demands a particular expertise, once again all the factors themselves and the means of investigating them are inter-related. For example, a site's "academic" value may lie in its unique or early use of a constructional technique rather than its appearance or social history, therefore the physical fabric itself rather than documents provides the evidence on which the historic value is based. In contrast, a very practical survey of the site's present physical condition may need to investigate its documentary history before the possibly historic cause of structural damage, and therefore its effect on the rest of the fabric, and on the general value of the property itself, can be assessed[46].

In all, the Charters' recommendations on the investigation of evidence should be seen in the light of **integrated conservation** [**5.1**], and those who carry out such investigations, whether into documentary, physical or social evidence, should ensure that other experts are aware of their research and are given the opportunity to suggest parallel lines of study, that their results are examined not just in the light of their own expertise but also by others, and that all information is combined and cross-referenced before any final assessment of "cultural value" is made.

1979 Burra Charter [23],
1982 Florence Charter [15],
1982 Desch. Decl. [III] [VI]
1983 Appleton Charter [D],
1986 Council of Europe R(86)15 [B.b],
1987 Washington Charter [5],
1992 N. Zealand Charter [3i],
1992 Thessaloniki Charter,
1993 Code of Ethics [5]
1996 Sophia Principles.
See also,
5.1 ***Int. Conservation.***

5.3ai. Any work on a site must be preceded by professionally prepared studies of the physical, documentary and other evidence of its cultural value, including, where relevant,
ii. an archaeological analysis of the ground.

[46]Eg, traces of damage from the dry rot fungus may be left from a period when the site was disused and the roof in disrepair. Documentary evidence can show both when the damage probably occurred and when repairs were effected (perhaps decades previously). If the roof has been well maintained since its repair, the remaining parts of the fungus itself may prove to be long since dead, and probably no remedial action need be taken. Similarly, a crack that occurred soon after a centuries-old property was built - since when no movement has taken place - has very different implications from a crack that occurred recently, and shows signs of further movement.

special case: vernacular architecture

1992 Thessaloniki Charter.
See also,
5.4 The Public Contribution.

iii. A study of the development of the site should be made with the aid of the inhabitants.

Note: vernacular architecture and indigenous cultural heritage overlap when the line of cultural development from original to present community is strong and relatively undisturbed.

1931 Athens Conference [VI],
1992 N. Zealand Charter [3i],
1992 Thessaloniki Charter,
1993 (draft) Code of Ethics [6] and,
5.1 Integrated Conservation.

5.3b. Its condition should be assessed and all causes of decay and other defects should be diagnosed.
and,

1989 Archaeological Charter [5].

5.3ci. the gathering of information should not destroy any more evidence than is necessary for the protectional or scientific objectives of the investigation.

ii. Non-destructive techniques should be encouraged.

Invasive investigation can be justified only,

1979 Burra Charter [24],
1989 Archaeological Charter [5],
1992 New Zealand Charter [9].

5.3di. where evidence that is not likely to be gained from any other source is about to be lost,
or

ii. where knowledge may be very significantly extended,
or

iii. where it is necessary to establish the existence of material of cultural heritage value,
or

iv. where it is essential for the conservation of the site.

v. Such investigation should leave the maximum amount of material undisturbed for study by future generations.

5.4 THE PUBLIC CONTRIBUTION

1982 Decl. of Tlaxcala [2a],
1982 Desch. Decl. [VII] [IX],
1983 Appleton Charter [B],
1985 C. of E. Granada Convention [14],
1987 Petropolis Charter [VIII],
1989 Archaeology Charter [2],
1992 N. Zealand Charter [3ii].

5.4ai. The public should be consulted during the assessment of cultural significance and before the action plan is drawn up.

And

1975 C. of E. Charter [9].
See also,
1972 UNESCO Convention [27],

ii. "*The public should be properly informed because citizens are entitled to participate in decisions affecting their environment.*"

1982 Decl. of Tlaxcala [2a],
1985 C. of E. Granada Convention [14],
1987 Washington Charter [3, 5],
1989 Archaeology Charter [2],
and,
5.1 Integrated Conservation.

5.5 STATEMENT OF CULTURAL SIGNIFICANCE

1979 Burra Charter, [6-note, 25],
1983 Appleton Charter [B],
1992 N. Zealand Charter [3i],
1993 Code of Ethics [7].

5.5a. Based on this research and survey, the value of the site should be defined, and a philosophy to guide all interventions should be established.

5.6 PREPARATION OF ACTION PLAN

1979 Burra Charter, [25],
1982 Florence Charter [15],
1992 N. Zealand Charter [3iii]
1993 Code of Ethics [7].

5.6a. A long- and short-term conservation plan should be developed.

In addition,

1987 Washington Charter [5].

5.6b. the legal, administrative and financial measures necessary to attain the principal objectives of the conservation plan should be clearly set out.

1986 Council of Europe R(86)15 [B.b].
See also,
5.1 Integrated Conservation.

5.6ci. Close co-operation between the building owner and architect should be backed by precise planning, a cost estimate and visual material, if possible including models and samples,
and,

ii. to avoid on-site errors and delays, there should be an interdisciplinary approach to proper regular exchange of information for the duration of the works.

5.7 PLAN FOR CONTINUED MAINTENANCE

1964 Venice Charter [4],
1979 Burra Charter [2, note],
1982 Desch. Decl. [V-A],
1983 Appleton Charter [C],
1987 Washington Charter [7],
1989 Archaeology Charter [6]

5.7a. Protection must involve a continuing programme of maintenance.

In addition,

1964 Venice Charter [5].

5.7b. conservation is always made easier by putting the site to some socially useful purpose.

special case: historic gardens

1982 Florence Charter [11 and 24].

5.7ci. *"Since the principal material is vegetal, the preservation of the garden in an unchanged condition requires both prompt replacements when required and a long-term programme of periodic renewal"* (eg clear felling and replanting with mature specimens)."

And

ii. *"Care should also be taken to ensure that there is regular propagation of the plant varieties necessary for maintenance or restoration."*

special case: non-intervention

1992 New Zealand Charter [15] + [14].

5.7d. *"A place of cultural heritage value should be maintained regularly and according to a plan, except in circumstances where it may be appropriate for places to remain without intervention."*

ie,

"Where undisturbed constancy of spiritual association may be more important than the physical aspects of some places of indigenous heritage value."

See also,

6.7 Non-intervention.

5.8 RECORDING OF INTERVENTION, AND PLACING IN PUBLIC ARCHIVES

1964 Venice Charter [16].
1979 Burra Charter [27, 28, 29],
1983 Appleton Charter [D],
1989 Archaeology Charter [5],
1992 New Zealand Charter [3v] + [12],
1996 Sophia Principles.

5.8ai. Every stage of the work of clearing, consolidation, rearrangement and integration, as well as technical and formal features identified during the course of the work should be precisely documented in the form of analytical and critical reports, illustrated with drawings and photographs.

ii. The record should be placed in the archives of a public institution and made available to researchers.

In addition,

1979 Burra Charter [26].

5.8b. the organisation and individuals responsible for policy decisions must be named and specific responsibility taken for each decision.

special case: indigenous heritage

1992 New Zealand Charter [12].

5.8c. *"Some knowledge of places of indigenous heritage value is not a matter of public record, but is entrusted to guardians within the indigenous community."*

6

GUIDELINES FOR WORKS ON SITE

Because Conservation work is begun solely to protect some particular quality or qualities of value to society, it makes additional demands on those who are carrying it out. A "normal" brief sets out the client's needs and requires these to be answered in a way which,

a. provides a structurally sound, wind and water tight structure,
b. constructs and arranges the accommodation necessary to the best functional and aesthetical spatial advantage, internally and externally,
c. does [a] and [b] within an agreed cost.

A Conservation brief requires the client's needs to be met in exactly the same way but **only** when this can be done with **minimal or no damage** to the cultural significance of the site itself. It could almost be described as brief within a brief, where the range of possible solutions is focused by the overlying need to conserve and protect.

The Charters point out the type of work to protected sites which lies within the terms of both the "normal" brief and the need to conserve, and which can therefore be considered acceptable action. It is worth remarking that much of the recommended action is very basic good practice and is applicable to any work, whether on a protected site or not.

Note: all the following recommendations are in addition to all the more general recommendations of the previous chapters. As in Chapters 3 and 5, the guidelines have been synthesised from the sources referenced and, while each source gives clear support to the major substance, each may contain its own minor variations in addition to the central theme which will not appear in this text. As before, numbers in square brackets indicate the relevant article.

GENERAL WORKS

6.1 CHOICE of MATERIALS and TECHNIQUES

1931 Athens Conference [IV],
1964 Venice Charter [10],
1979 Burra Charter [4],
1983 Appleton Charter [D],
1992 New Zealand Charter [4iii],
1993 (draft) Code of Ethics [11].

6.1a. Materials and techniques should respect traditional practice.

The use of modern substitutes is appropriate only when

6.1b i. they provide a significant advantage which can be identified,
ii. their use has a firm scientific basis
and
iii. has been supported by a body of experience.

1992 Thessaloniki Charter.

6.1c. The new material is compatible with the expression, appearance, texture and form of the original
and

1982 Declaration of Tlaxcala [7a].

6.1d. meets the requirements of both the local physical and geographical conditions and the way of life of the population.

6.2 THE DESIGN of NEW WORKS

This advice applies to work carried out on a single building or group of buildings, and on a town or area when it is being protected as a whole (in which case it should be considered as a single architectural entity), rather than as the context for a protected single building or group of buildings (in which case see **6.5**).

New work in protected fabric is acceptable only if

1972 Budapest Resol's [1].
6.2ai. the existing fabric is accepted as the framework by which the design of later interventions should be set,

1931 Athens Conference [VI],
1964 Venice Charter [9 + 12],
1979 Burra Charter [19],
1983 Appleton Charter [D],
1992 N Zealand Charter [4iii].
ii. it is identifiable on close inspection or to the trained eye, but
iii. does not impair the aesthetic integrity or coherence of the whole.

When assessing the aesthetic integrity and coherence of the whole, the following factors should be taken into account:

1964 Venice Charter [6 + 13],
1972 Budapest Resol's [2],
1987 Washington Charter [2].
6.2bi. the relations of mass and colour and
ii. the traditional setting, the balance of its composition and its relation with its surroundings;

1979 Burra Charter [8].
iii. form, scale, colour, texture and materials;

1982 Desch. Decl. [VI-D],
1987 Washington Charter [2].
iv. tonality, texture, proportions, pattern of filled and empty spaces, and overall composition;

1983 Appleton Charter [C],
1987 Washington Charter [2].
v. existing and original patterns of movement and layout;

1992 Thessaloniki Charter.
vi. the (vernacular) plan, volume and shell.

1982 Desch. Decl. [VI-D],
1983 Appleton Charter [C].
6.2ci. Any contemporary additions must be creative works in their own right, and

1962 UNESCO Recommendation [7a],
1972 Budapest Resolution [3].
ii. a "facile imitation" of traditional and picturesque forms should be avoided, but
iii. the design should be in harmony with the general character.

special case: preservation

1979 Burra Charter [11].
6.2d. New construction may be carried out in association with preservation when its purpose is the physical protection of the fabric.

special case: in some ensembles of vernacular architecture

1975 Plovdiv Resolutions [ix].
6.2e. "[conservation] *would involve the rejection of all new construction liable to impair its harmony ...*"

6.3 NEW USE, RE-USE, ADAPTION and UTILISATION

Adaption is appropriate when

1983 Appleton Charter [C],
1992 N. Zealand Charter [20].

6.3ai. the continuity of the traditional function is not possible,
or

1993 Management Guidelines (p.60).

ii. when the traditional function is causing damage to the historic integrity, or

1992 N. Zealand Charter [20].

iii. when it is essential to continued use,
or

1979 Burra Charter [20],
1992 N. Zealand Charter [20].

iv. when the conservation of the place cannot otherwise be achieved.

When one or more of these conditions have been met,

1931 Athens Conference [I],
1964 Venice Charter [5],
1979 Burra Charter [20],
1983 Appleton Charter, [C].

6.3bi. consideration of new use should begin with respect for existing and original patterns of movement, layout and decoration, and

ii. every reasonable effort should be made to provide a compatible use which requires minimal alteration.

An appropriate choice of new use is one which

1979 Burra Charter [1.10],
1982 Desch.Decl. [VIII-C],
1992 Thessaloniki Charter.

6.3ci. involves no change to the culturally significant fabric, only changes which are substantially reversible, or changes which require a minimal impact,

1972 Budapest Resolution [4].

ii. affects neither the structure nor the character as a complete entity, whether internally or externally, and

1981 Florence Charter [18, 19, 20, 21],
1982 Deschambault Declaration [VIII-D].

iii. avoids those which would cause excessive use and the deterioration that would result from such use, for

iv. access must be restricted to the extent demanded by the site's size and vulnerability, in order that its physical fabric and cultural message may be preserved (eg, an historic garden).

Note: this guideline applies not only to gardens but to all buildings and sites and therefore is not a special case.

See also,
9.3 Traffic.

An appropriate new use also

1982 Desch. Decl.[IX-A], [IX-B]
1992 N Zealand Charter [4iv],
1987 Petropolis Charter [VII].

6.3di. respects the established rights of the local population, and the needs and legitimate aspirations of the inhabitants,
and

1982 Desch. Decl. [IX-A] [IX-B],
1987 Petropolis Charter [V],
1987 Washington Charter [9]
1975 Plovdiv Resolutions [vi],

ii. gives preference to the maintenance or re-introduction of "everyday life"; ie traditional occupations and housing rather than museums and tourist centres,
for

See also,
9.4 Tourism.

1964 Venice Charter [5],
1982 Desch. Decl. [VIII-A and B],
1992 N. Zealand Charter [20].

iii. the conservation of a place of cultural heritage value is usually made easier when it serves a socially, culturally or economically useful purpose.

Modifications for an appropriate new use are acceptable when

1979 Burra Charter [21],
1992 N. Zealand Charter [20].

6.3ei. only those changes essential to the new use are made,

1981 Florence Charter, [22],
1983 Appleton Charter, [C].

ii. they respect the existing and traditional equilibria of the environmental conditions and do not set in motion processes of decay,
and

1983 Appleton Charter, [C],
1992 N. Zealand Charter [20].

iii. they bear a contemporary stamp while respecting the spirit of the original design.

In addition,

1975 Plovdiv Resolutions [iv].

6.3fi. the population should be enabled to participate actively in the process of renovating their quarters, and

1987 Petropolis Charter [V].

ii. care should be taken to give them the possibility of returning to inhabit the same lodgings after rehabilitation and restoration, and

1982 Deschambault Declaration [IX-A],
1987 Petropolis Charter [V].

iii. "*The needs and legitimate aspirations of the inhabitants* [must be respected] *even if this requires us to adopt uses that are different from the original uses*".

special case: open-air museums

1975 Plovdiv Resolutions [vii].
See also,
1992 Thessaloniki Charter [intro].

6.3g. "[Though] *open-air museums, displaying various types of vernacular architecture, can fulfil an educational and scientific role, ... recourse should be had to this solution only in particular circumstances and in exceptional cases.*"

special case: historic towns

1983 Appleton Charter [C],
1987 Washington Charter [8].

6.3hi. Adaption of an historic town to contemporary life requires the careful installation or improvement of public service systems, and

1982 Declaration of Tlaxcala [3].

ii. "*the public services administrations concerned with such things as communications, health, education, electrification etc, should be duly conscious of the fact that their activities undertaken with the best intentions can on the contrary cause harm to small communities if they are ignorant of, or fail to appreciate, the values of the cultural heritage and the benefits deriving from the conservation of that heritage for the community as a whole.*"

special case: monuments destroyed by war

1982 Declaration of Dresden [10].

6.3j. The destruction of a monument frequently results in completely new objectives for social use and their understanding after its reconstruction being established.

Finally,

1979 Burra Charter [22].

6.3ki. the fabric of cultural significance unavoidably removed in the process of adaption is kept safely to enable its future reinstatement, and

1975 Plovdiv Resolutions, [viii].

ii. all existing fabric should be methodically documented before its alteration begins, as should the progress and extent of the alterations themselves.

6.4 STABILISATION or CONSOLIDATION

Stabilisation is appropriate, in work of **preservation**, where

1992 N. Zealand Charter [16].

6.4ai. decay is not appropriate to the value;

1931 Athens Conference [IV].

ii. its use makes it possible to avoid the dangers of dismantling and reinstating the portions to be conserved;

1979 Burra Charter [12, note].

iii. it does not introduce new materials into the fabric.

Stabilisation is appropriate, in work of **restoration**, where

1964 Venice Charter [15].

6.4bi. the material used for integration of existing but dismembered parts should be the least that will ensure the conservation of a monument and the reinstatement of its form;

1931 Athens Conference [IV],
1983 Appleton Charter, [D].

ii. the work does not impair the aesthetic integrity or the coherence of the whole.

Stabilisation, in work of **reconstruction**, can be appropriately effected by

1931 Athens Conference [IV],
1964 Venice Charter, [10],
1979 Burra Charter [12, note].
1993 Code of Ethics, [11].

6.4ci. the use of any modern technique for conservation and construction, when traditional techniques prove inadequate, and

ii. when the efficacy of the new technique has been shown by scientific data and proved by experience.

6.5 TREATMENT OF CONTEXT

1964 Venice Charter [6].
1992 N. Zealand Charter [6].

6.5a. Wherever the traditional setting exists, it must be kept.

Note: the New Zealand Charter also recommends that "if the historic setting no longer exists, construction of a setting based on physical and documentary evidence should be the aim". This recommendation could come in conflict with its own article [19] which states that reconstruction should not normally constitute the majority of a place.

1931 Athens Conference [III],
1964 Venice Charter [6],
1979 Burra Charter [8],
1982 Florence Charter [7+14],
1983 Appleton Charter [C].

6.5bi. Conservation requires the maintenance of an appropriate visual setting, eg form, scale, colour, texture and materials.

ii. No new construction, demolition or modification which would adversely affect the settings should be allowed.

iii. Environmental intrusions which adversely affect appreciation or enjoyment of the *place* should be excluded.

1982 Florence Charter [14].

6.5c. Any alteration to the physical environment which will endanger the ecological equilibrium must be prohibited.

1982 Deschambault Declaration [IX-C].

6.5d. The quality of life [of the inhabitants] in the environments where heritage monuments, landscapes, remains and complexes are located should be preserved and enhanced.

6.6 MANAGEMENT

Management strategies

1993 Education Guidelines [2],
1995 Council of Europe Segesta Declaration.

6.6ai. must respect the cultural heritage, and

ii. must be sustainable, and

iii. require the integration of conservation attitudes with contemporary economic and social goals including tourism.

special case: archaeological sites

1989 Archaeological Charter [6].

6.6bi. The overall objective of archaeological heritage management should be the preservation of monuments and sites *in situ* including,

ii. long term conservation and curation of all related records and collections etc and,

iii. if provision for maintenance and management after excavation cannot be guaranteed, sites should not be exposed.

See also,
5.1 Non-intervention.

Good management

1990 Heritage and Tourism Conference Resolution [7].

6.6c. should define the level of acceptable tourism development and provide controls to maintain that level.

Those who conceive and implement the touristic use of the cultural and natural heritage

1976 Charter of Cultural Tourism.

6.6di. "*should receive training adapted to the multi-faceted nature of the problem [of the negative despoiling or*

See also,
8.5 Post-grad. Education,
5.1 Integrated Conservation.

destructive effects which the massive and uncontrolled use of monuments and sites entails]..." and,

ii. should be associated from the outset in the programming and performance of the development and tourist equipment plans.

special case: archaeological sites

1989 Archaeol. Charter [8].
8.5 Post-graduate Education.

6.6e. High academic standards in many different disciplines are essential in the management of archaeological sites.

special case: indigenous cultural heritage

1989 Archaeol. Charter [6],
1992 N. Zealand Charter [2].

6.6f. Responsibility for the protection and management of places of indigenous cultural heritage should be entrusted to indigenous peoples.

SPECIFIC WORKS

Some approaches to conservation work, such as decisions **to preserve** or **to restore**, are much more than a particular variation of a "normal" action: they are inspired almost solely by the site's cultural significance, they would not exist as an option independent of it, and they have little to do with the site's physical well-being in itself. In effect, they might better be described as "policy declarations".

Because such terms describe a general policy that, once adopted, will guide all decisions on site, they have a particularly strong effect on all the component qualities of its cultural significance. In the Charters, each is explained in detail, boundaries are set for its use and its effect on the physical fabric as well as the quality being protected are made clear. Just how far each approach can be taken, without losing the very quality that the work is trying to protect, is spelled out so that an informed judgement can be made on whether the action is appropriate or inappropriate. (The definition of each term as used by the Charters can be found in Chapter 3.)

6.7 NON-INTERVENTION

Non-intervention may be appropriate where

1992 New Zealand Charter [14].

6.7a. assessment shows that any intervention is undesirable, eg,
"... *in particular, undisturbed constancy of spiritual association may be more important than the physical aspects of some places of indigenous heritage value.*"

special case: archaeological sites

1956 UNESCO New Delhi Recommendation [9].
1989 Archaeological Charter [5]

6.7b. "Witness" sites and areas of larger sites being excavated should be left untouched to allow for eventual verification of the stratigraphy and archaeological composition, as well as to benefit from future advances in techniques and knowledge.

6.8 PRESERVATION

Preservation action is appropriate only when

1979 Burra Charter [11].
6.8ai. the evidence given by every part of the fabric itself is of such significance that it must not be altered, eg archaeological remains of national importance;

1979 Burra Charter [11].
ii. insufficient evidence is available to allow other conservation processes to be carried out;

1979 Burra Charter [11].
iii. insufficient investigation has been carried out to permit conservation policy decisions to be taken.

Preservation should be carried out only in such a way that

1979 Burra Charter [11].
6.8bi. evidence of the construction or use of the fabric would not be obscured;

1979 Burra Charter [12].
ii. its use is limited to the protection, maintenance and, where necessary, the stabilisation of the existing fabric;

1979 Burra Charter [12].
iii. its use does not distort the cultural significance.

6.9 RESTORATION (including **anastylosis**)

Restoration action is appropriate when

1979 Burra Charter [15].
6.9ai. it is limited to the reassembling of displaced components and the removal of accretions.

The reassembling of displaced components is appropriate when

1964 Venice Charter [9],
1979 Burra Charter [14],
1992 N. Zealand Charter [18].
6.9bi. it is based on respect for original material and authentic documents;

See also,
4.1 Authenticity.

1964 Venice Charter [9],
1979 Burra Charter [14],
1981 Florence Charter [15],
1983 Appleton Charter, [C].
ii. it is not conjectural;

See also,
4.2 Conjecture.

1931 Athens Conference [VI],
1964 Venice Charter [9].
iii. any extra work which is indispensable in the course of **restoration** is distinct from the architectural composition and bears a contemporary stamp;

See also,
6.2 Design of new work.

1979 Burra Charter [13].
iv. there is sufficient evidence of an earlier state of the fabric;

1964 Venice Charter [9]
1979 Burra Charter [13],
1992 N. Zealand Charter [18].
v. only if returning the fabric to that state recovers the cultural significance of the place;

1931 Athens Conference [I],
1964 Venice Charter [11],
1979 Burra Charter [16],
1981 Florence Charter [16],
1982 Desch.Decl. [IV-B].
1992 N. Zealand Charter [5].

vi. the valid contributions of all periods to the site are respected; and
vii. the aim is not unity of style.

See also,
4.6 Respect for the contributions of all periods.

The revealing of the underlying state is justified only when

1964 Venice Charter [11],
1979 Burra Charter [16],
1992 N. Zealand Charter [5].

6.9ci. what is removed is of minimal cultural significance, and

1992 N. Zealand Charter [5].

ii. such material should be documented before it is obscured or removed;

1964 Venice Charter [11],
1979 Burra Charter [16].

iii. the material revealed is of great cultural significance;

1964 Venice Charter [11].

iv. the condition of the material to be revealed is good enough to justify the action.

special case: archaeological ruins

1964 Venice Charter [15].

6.9di. "*Only anastylosis ... can be permitted [in regard to ruins].*"

1931 Athens Conference [VI].

ii. "*In the case of ruins ... steps should be taken to reinstate any original fragments that may be recovered ...*".

Note: guideline **6.9c** should be compared to those of the more recent archaeological charters, which will be found in the following section **6.11**[g] and [h].

6.10 REPLICATION

There is a tendency to confuse the terms **replication** and **reconstruction**. Both are actions which try to reproduce work which no longer exists, but while **reconstruction** should always be identifiable as new work (see **6.11**[c]), **replication** attempts to form an exact copy and is therefore intrinsically deceptive in intent. This is similar to the ethical and legal distinction made between a forgery and a marked copy of an artwork.

The *New Zealand Charter*, the only one to refer to **replication**, does so only to specifically exclude such action from the scope of a conservation charter.

6.11 RECONSTRUCTION

Reconstruction is appropriate only when

1979 Burra Charter [17].
6.11ai a site is incomplete, and reconstruction is necessary for its survival;

1979 Burra Charter [19],
1992 N. Zealand Charter [19].
ii. it reveals the cultural significance of the place as a whole;

1979 Burra Charter [19],
1982 Florence Charter [17],
1982 Desch. Decl. [V-C],
1983 Appleton Charter [D],
1992 N. Zealand Charter [19].
iii. it is not conjectural;

1979 Burra Charter [18],
1992 N. Zealand Charter [19].
iv. it does not constitute the majority of the fabric;

1979 Burra Charter [19],
1983 Appleton Charter [D].
v. it is identifiable on close inspection as new work; and

1992 N. Zealand Charter [19].
vi. it avoids generalised representations of typical features.

special case: archaeological sites

1964 Venice Charter [15].
6.11bi "*All reconstruction work [of archaeological sites] should ... be ruled out a priori.*"

1989 Archaeol. Charter [7].
ii. Reconstructions should be carried out with great caution to avoid disturbing any surviving archaeological evidence.

1989 Archaeol. Charter [7].
iii. "*... Where possible and appropriate, reconstructions should not be built immediately on the archaeological remains, and should be identifiable as such.*"

Note: because of the nature of archaeological sites, **6.11b**[ii] and [iii] are in direct conflict with **6.11a**[iii], [iv] and [vi] and, in the terms of other Charters, could only be defined as **re-creation**. (See below, and also Section **6.8** above.)

special case: monuments damaged by war

6.11c. The Declaration of Dresden (1982) states that "*... special care should be taken that the historic development up to the present time can be traced. This applies to the elements of monuments from different periods as well as other evidence of its fate. This might include modern elements which have been added in a responsible manner.*"

It continues;

"*The complete reconstruction of severely damaged monuments must be regarded as an exceptional*

circumstance which is justified only for special reasons resulting from the destruction of a monument of great significance by war. Such a reconstruction must be based on reliable documentation of its condition before destruction." [8]

6.12 **RE-CREATION** (or conjectural reconstruction)

All Charters are unanimous in their refusal to consider conjectural reconstruction or **re-creation** as an acceptable action within the terms of conservation, except for the *Washington Charter* which merely "discourages" alterations that have no historical basis and which seek to create an earlier appearance (Appendix 3). The *Florence Charter* makes the reasons for such rejection quite clear:

"*Where a garden has completely disappeared or there exists no more than conjectural evidence of its successive stages a reconstruction could not be considered an historic garden.*" [17]

6.13 **REHABILITATION**

Rehabilitation is appropriate only when

1972 Yazd Resolutions [ii],
1975 Plovdiv Resolutions [ii].
See also,
5.5 Statement of cultural significance,
5.6 Preparation of Action plan.

6.13ai a coherent policy has been evolved for the whole (site or) settlement;

1976 Yazd Resolutions [4],
1975 Plovdiv Resol. [viii]
See also,
5.2 Recording of fabric,
5.3 Investigation of evidence.

ii. a detailed survey and assessment, employing the most up-to-date techniques has been carried out;

1976 Yazd Resolutions [4],
1975 Plovdiv Resolutions [v].

6.13b there is no loss of character, when the typical architectural features are kept, and when the internal arrangement of significance is unchanged, and

1975 (C of E) Declaration of Amsterdam [p.8].

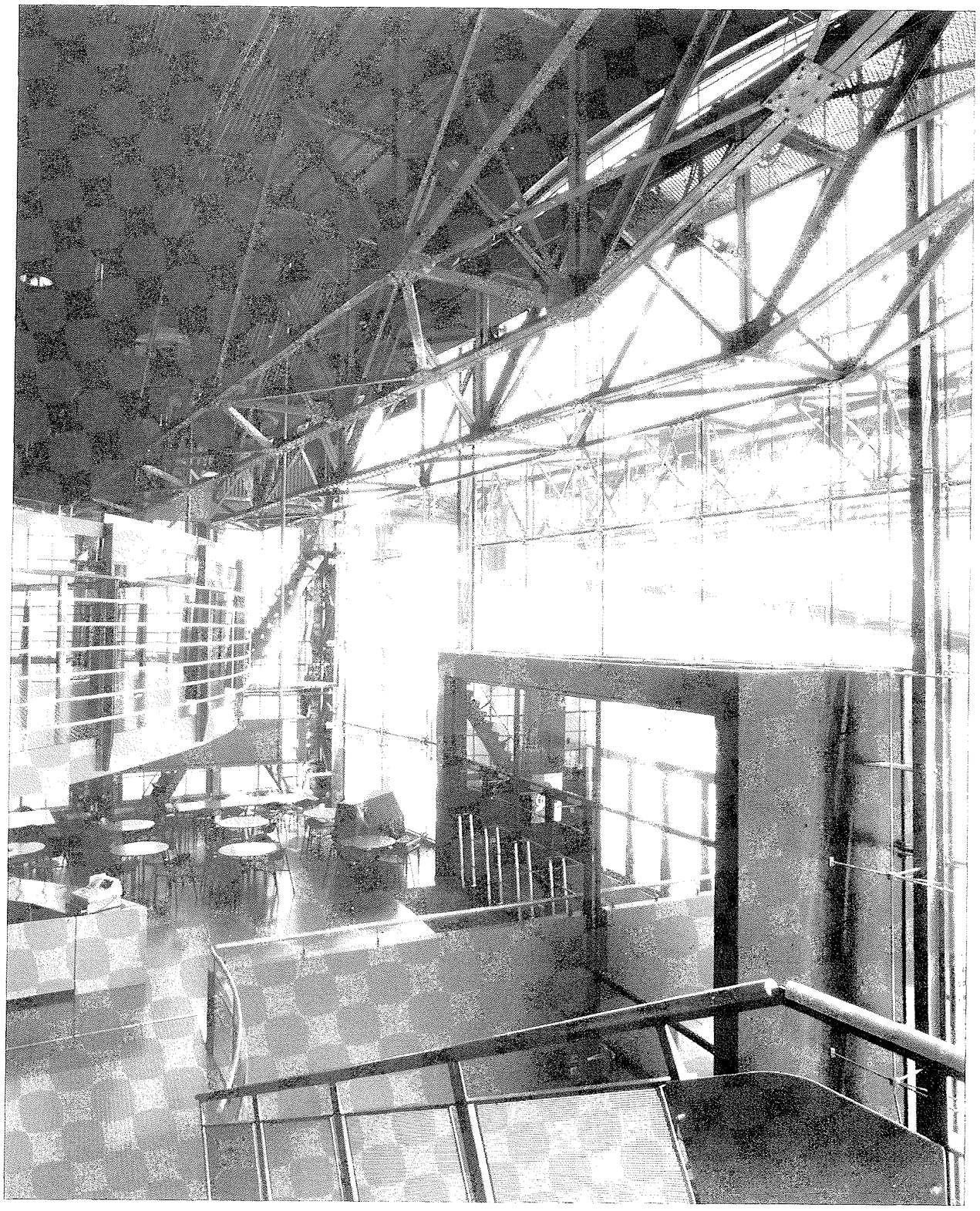
6.13c the inhabitants have been enabled to participate actively in the process of renovating their quarters, and

1975 Plovdiv Resolutions [iv].

ii. they have been given the possibility of returning to the same lodgings as before;

1975 (C of E) Declaration of

iii. the action will require no major change in the social

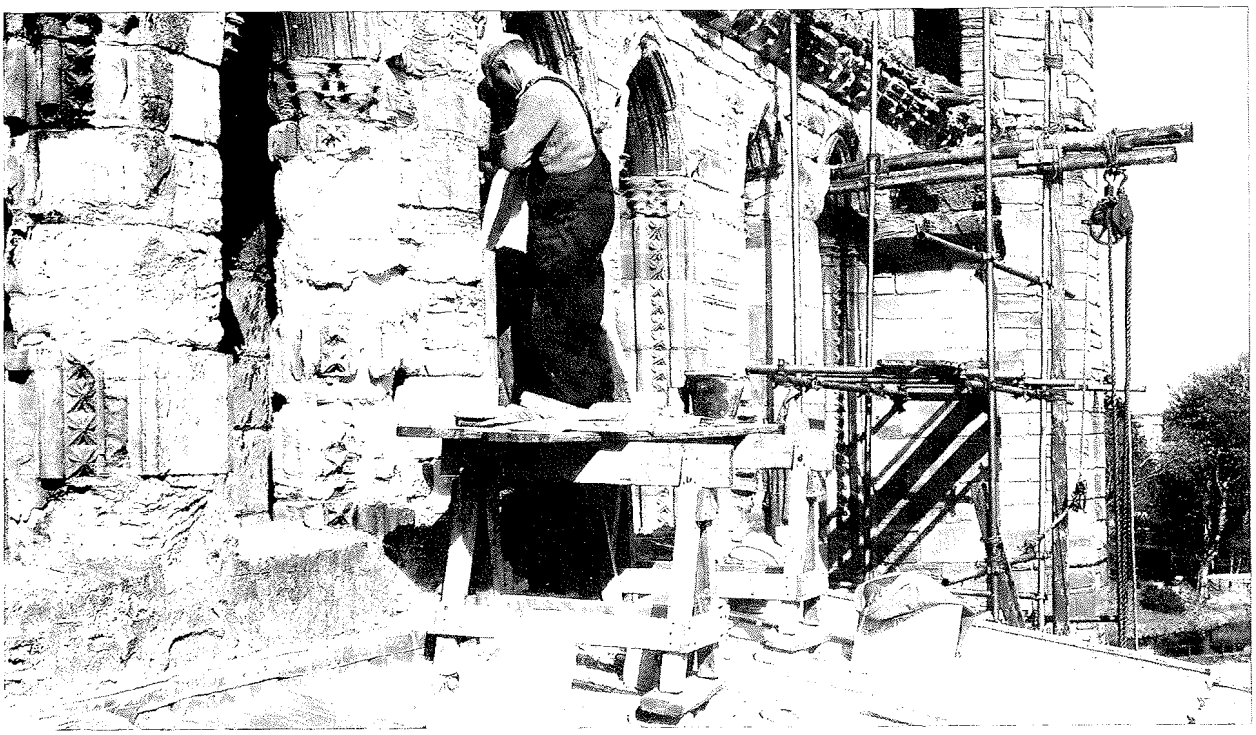


3. Turku Conservatoire, Finland (architects *Laiho, Pulkinnen and Raunio*, 1995)

(**6.2** The Design of New Work)
This competition-winning conversion of a disused rope-factory (1934) and ship-yard hall (1928) into a music school has not only left the feeling of space and the original structure intact but has maintained their pre-eminence in the new design. At the heart of the vast space now floats a concert hall of glass, poised only a few metres apart from the great rusty riveted columns of the old structure, while the new foyer is suspended from the overhead cranes.

4a. Preparing test panels of clay walling

(**8.5** Post-graduate Education)
Students of the Scottish Centre for Conservation Studies helping to prepare test panels of clay walling as part of the *Historic Scotland* technical research into earthen structures, directed by Rebecca Little.



4b. A mason at work on Elgin Cathedral

(**8.6** Education and Training of Craftsworkers)
Historic Scotland's workshops at Elgin Cathedral provide the skilled craftsmanship necessary for the repair of sophisticated mediæval tracery, as well as training and practice for the next generation of master masons.

Amsterdam [f],

See also,
7.5 **Financial measures.**

composition as

iv. public authorities will intervene to reduce the effects of economic factors.

6.14 ENHANCEMENT

See,
6.2 **Design of new works,**
6.3 **New Use,**
6.4 **Treatment of Context,**
9.4 **Tourism,**
9.3 **Traffic,**
9.2 **Pollution.**

The guidelines for ***enhancement*** are given under different terms (as noted) in different Charters.

In addition to the factors shown in the margin, the (1982) *Deschambault Declaration* [IX-C] recommends that a policy of **enhancement** should consider the quality of life in the neighbourhood of protected sites.

6.15 RELOCATION (including **dismantling**)

Relocation and **dismantling** are inappropriate except when;

1968 UNESCO Conv. [9],
1964 Venice Charter [7],
1979 Burra Charter [9],
1982 Florence Charter [13],
1983 Appleton Charter [C],
1985 C. of E. Convention [5].
1989 Archaeol. Charter [6].
1992 Thessaloniki Charter.

6.15ai overriding economic or social conditions require that cultural property be transferred, abandoned or destroyed,

ii. protection cannot be achieved by any other means,

iii. the action is not to the detriment of any place of cultural significance.

exceptional case:

1992 N. Zealand Charter [8i].

6.15b. "the site is not of associated value".

Relocation should take place only if

1968 UNESCO Conv. [9],
1979 Burra Charter [9],
1992 N. Zealand Charter [8].

6.15ci the new site provides a setting compatible with cultural heritage value and

ii. a compatible use.

Note: the 1968 Unesco Convention recommended that **relocated** structures "*should be placed on a site or in a setting which resembles their former position and natural, historic or artistic associations*" [11]. This view could come into conflict with other Charters' views on authenticity (see **4.1**).

In addition,

1968 UNESCO Conv. [9].

See also,
5.2 **Recording of fabric as found.**

6.15di the salvage or rescue operations should always include careful study of the cultural property involved and the preparation of detailed records;

1985 Council of Europe, Granada Convention [5].

ii. the competent authority should take the necessary precautions for its dismantling, transfer and reinstatement at a suitable location.

special case: movable structures

1979 Burra Charter [explanatory note 9].
1992 New Zealand Charter [8iii].

6.15e. The relocation of structures designed to be readily removable or with a history of previous moves (eg prefabricated dwellings) may be considered provided such structures do not have a strong association with their present site.

6.16 REMOVAL of CONTENTS AND COMPONENTS

1931 Athens Conference [V],
1964 Venice Charter [8],
1979 Burra Charter [10],
1985 Council of Europe, Granada Convention [5],
1989 Archaeol. Charter [6],
1992 N. Zealand Charter [10].

The removal of contents (or components) which form part of the cultural significance of a place is unacceptable unless

6.15ai it is the sole means of ensuring their security and preservation.

6.16bi Such contents (or components) must be returned should changed circumstances make this practicable. In addition,

1982 Florence Charter [13].

ii. the date of any complete replacement must be indicated.

For guidelines on the removal of other contents or components, see **6.9c Restoration**.

7

LEGAL and FISCAL MEASURES

"*The heritage is in danger*", began article 6 of the Council of Europe's 1975 *Amsterdam Charter*. It continued;

> "*Urban planning can be destructive when authorities yield too readily to economic pressures or the demands of motor traffic. ... Above all, land and property speculation feeds upon all errors and omissions and brings to nought the most carefully laid plans.*"

UNESCO had already strongly recommended the adoption of stringent legal measures in 1962 and 1968, but a more permanent dialogue between conservationists and those responsible for planning was now indispensable. It was not enough "*to simply superimpose, without co-ordinating them, ordinary planning regulations and specific rules for protecting buildings.*"[47] The protection of the environment had to become "*an integral part of urban and regional planning, instead of being treated as a secondary consideration or one requiring action here or there ...*"[48]. (See also section **5.1 Integrated conservation**.) By 1985, the member countries of the Council of Europe had agreed to "*include the protection of the architectural heritage as an essential town and country planning objectives*" and to ensure that this was taken into account in the drawing up of development plans and in "*the procedures for authorising work*"[49]. With conservation established as "*a major feature of cultural, environmental and planning policies*"[50], its aims could begin to modify the objectives of other powerful lobbies.

Today, almost all these measures are in place, and the following recommendations are more of historic interest than practical use.

7.1 ADMINISTRATIVE MEASURES

1962 UNESCO Rec. [31, 32],
1968 UNESCO Rec. [20a, b].

Specialised government administrative departments should be established,

7.1ai. to study problems of protection and scheduling,
ii. to undertake surveys on the spot,
iii. to prepare decisions to be taken and to supervise their implementation,
iv. to propose measures designed to reduce dangers in carrying out certain types of work, and
v. to repair damage caused by such work.

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[47] *Amsterdam Charter*, Council of Europe, 1975.

[48] *Declaration of Amsterdam*, 1975.

[49] *Granada Convention*, 1985, article 10.1.

[50] ibid, article 10[3].

Note: see also **8.2** for the educational role of governmental organisations.

The relevant national, regional and local authorities should give assistance to the revival or reopening of firms producing traditional materials,

1986 Council of Europe R(86)15 [C],
1992 Thessaloniki Charter [p.4].

7.1bi. by maintaining and adopting a suitable information policy, and

ii. by keeping trades using such materials more fully informed about the nature, characteristics and effects of new materials on sale and of their aging properties.

Whenever official bodies or services already exist,

1968 UNESCO Rec. [20].

7.1ci. they should be given responsibility for the preservation of cultural property against the dangers caused by public or private works, and

1968 UNESCO Rec. [20e].

ii. administrative measures should be taken to establish an authority or commission in charge of urban development programmes in all communities having scheduled or unscheduled historic quarters, sites and monuments which need to be preserved against public and private construction,

which should also

1982 Declaration of Tlaxcala [6a].

iii. provide a suitably integrated infrastructure (see **6.3h**) together with the practical equipment for arresting the depopulation of small settlements, since "*any action designed to preserve the urban setting and the architectural qualities of a place must essentially be a fight for the improvement of its population's socio-economic conditions and of the quality of life of its urban centres.*"

7.2 ADVISORY MEASURES

Specialist advisory bodies - commissions at national, regional or local level - should be established,

1962 UNESCO Recommendation [33].

7.2ai. to study questions related to protection and to give their opinion on those questions to the central or regional authorities or to the local communities,

ii. whose opinion should be sought in all cases and in good time, "*particularly at the stage of preliminary planning*" in the case of large scale works of public interest, and

1968 UNESCO Recommendation [20a].

iii. to advise, in particular, on conflicts of interest between requirements for public or private works and the preservation or salvage of cultural property,

noting that

1968 UNESCO Recommendation [21].

iv. *"At the preliminary stage of any project involving construction in a locality recognised as being of cultural interest ... several variants of the project should be prepared, at regional and municipal level, before a decision is taken."*
"The choice between these variants should be made on the basis of a comprehensive comparative analysis, in order that the most advantageous solution, both economically and from the point of view of preserving or salvaging cultural property, may be adopted."

7.3 THE FORMATION OF NATIONAL AND LOCAL NON-GOVERNMENTAL BODIES

The formation of non-governmental amenity bodies should be encouraged, in order to

1962 UNESCO Recommendation [34],
1982 Declaration of Tlaxcala [8].
1992 Thessaloniki Charter [p.3].

7.3ai. collaborate with the governmental advisory and administrative bodies,
ii. inform the public,
iii. warn the appropriate departments of dangers facing landscapes and sites, and
iv. promote the active participation of individuals in the establishment and development of local practice.

7.4 PUNITIVE MEASURES

1962 UNESCO Recommendation [35, 36],
1968 UNESCO Recommendation [27],
1985 Council of Europe Convention [9].

7.4ai. Violation of the rules governing the protection of landscapes and sites should involve payment of damages, or
ii. the obligation to put back the site to its former condition, as far as possible, and
iii. administrative or criminal prosecutions should be provided for in the case of deliberate damage to protected sites.

7.5 FINANCIAL MEASURES

Member states should ensure that

1968 UNESCO Recommendations [15].

7.5ai. adequate budgets are available for the preservation or salvage of cultural property endangered by public or private works, or
ii. the costs, including preliminary archaeological research, should form part of the budget of construction costs, or
iii. the two methods (a) and (b) should be combined, and

1968 UNESCO Recommendation [16].

7.5bi. in the event of unusual costs, there should be possibilities of obtaining additional funds through enabling legislation, etc.

Also

1975 Bruges Resolutions [5i].

7.5ci. the economic function of smaller towns should be set by regional policy makers at a level which implies neither disruption nor dereliction of the historic substance and structure.

Member states should encourage

1962 UNESCO Recommendation [29],
1982 Declaration of Tlaxcala [6].

7.5di. the acquisition of sites (whose protection is desirable) by communities, and

ii. when necessary, it should be possible to effect such acquisition by expropriation.

Proprietors should be encouraged to preserve the character and aesthetic qualities of their cultural property, through

1968 UNESCO Rec. [17],
1986 Council of Europe R(86)15 [B.a].

7.5ei. favourable tax rates, or

ii. grants and loans, or

iii. both methods (a) and (b) combined, and

1982 Declaration of Tlaxcala [6].

iv. an amendment of the norms governing the allocation of funds to enable buildings for which vernacular techniques and materials have been used to be eligible for mortgage loans.

When budgeting for the preservation of cultural property endangered by public or private works,

1968 UNESCO Recommendation [19].

7.5fi. national or local authorities, as well as private owners, should take into account the intrinsic value of cultural property, and

ii. also the contribution it can make to the economy as a tourist attraction.

Note: taking into account **7.5c** and **6.3c**iii, iv.

The level of activity of craft firms and therefore the vitality of crafts trades should be stimulated by

1986 Council of Europe R(86)15 [B.a].

7.5gi. systems combining public and private funds at national, regional and local level in particular, for cost-sharing among a number of public and private agencies allows work to be carried out in cases where the owner or user is unable to defray the cost unaided;

ii. suitable financial support by public authorities to ensure the continuance of highly specialized undertakings which are vital for heritage conservation but are in difficulty due to low levels of demand.

8

THE EDUCATION OF THE PUBLIC AND THE PROFESSIONS

Education is an essential part of the action which needs to be taken if the environment is to be protected. Potentially, its greatest guardians are those who have most to gain or lose from its treatment, its owners and users, the general public. As the authors of the *Deschambault Declaration* point out: *"The citizens ... [have] an individual responsibility to protect their heritage. They must do all they can to appreciate its value, to strive to understand its full significance, and to contribute to its preservation."*

As well as a community which supports and cares for its environment, there must be those with the skill to design the means of maintaining its quality, and those with the skill to carry out the work. After the great post-war demolitions, and with the change not just in building techniques but in the very organisation of the construction industry, many skills and attitudes of mind have almost entirely disappeared; they have been allowed to die out, unused and unappreciated. Most of today's leading architects, engineers and planners were trained at a time when old buildings and areas were regarded with contempt and indifference, when disgust with the living conditions of large numbers of the population was transferred to the buildings and areas in which, by economic necessity, they were forced to live. In reaction, the teaching and use of new building methods dominated the professions and trades almost to the exclusion of the old with the result that, until very recently, all too many of those involved in the repair and adaption of older structures were unfamiliar with their unique qualities, with the way they behave and with the way that can be used to advantage.

Craft and trade skills themselves are as much a part of the cultural heritage as the objects their use has produced. As the Council of Europe's *Recommendation on the promotion of craft skills* (1986) pointed out, with the growing importance of architectural conservation, craft trades are once again a significant factor in economic and social life, and the creation of such employment not only may help to revive and stimulate the economy as a whole, but also provides personally satisfying and rewarding work. Now a wide range of skills is slowly being recovered. Scotland has had a post-graduate course in architectural conservation since the 1970s, one of the first to be established in the United Kingdoms, and more new courses are starting every year. There are another seven courses of similar age and reputation in England. Undergraduate teaching is being encouraged in Schools of Architecture by the RIAS and RIBA, and in Schools of Planning and Surveying by their own professional bodies. An enormous range of craft and science based training also exists throughout the country.

Courses vary widely in content, teaching method and standards, and each has its own assessment criteria. In an attempt to bring some consistency of quality to conservation education, the Scottish course and its seven contemporaries have agreed to adopt the ICOMOS *Education Guidelines* (1993), in addition to which the long-established Scottish course also conforms to the Council of Europe's *Recommendation* R(80)16[51].

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[51]The government of the United Kingdoms has also brought out its own criteria of course assessment under the *Scottish Vocational Qualifications* (SVQ) module scheme, as well as providing advice to practitioners with *The Repair of Historic Buildings in Scotland, Advice on Principles and Methods* (1995), and the soon to be published *British Standard Guide to Conservation Practice.*

8.1 PUBLIC RESPONSIBILITIES

1982 Deschambault Declaration [I-A].

8.1ai. *"The citizens ... [have] an individual responsibility to protect their heritage. They must do all they can to appreciate its value, to strive to understand its full significance, and to contribute to its preservation."*

1982 Deschambault Declaration [X]

ii. *"Our educational institutions must promote the idea that everyone has to take responsibility for preserving the national heritage."*

1956 UNESCO New Delhi Rec. [preamble],
1968 UNESCO Rec. [preamble],
1975 Bruges Resolutions [5v].

iii. The surest guarantee for the preservation of monuments and works of the past rests in the respect and affection felt for them by the people themselves.

8.2 PUBLIC EDUCATION

Public affection, interest in and respect for the quality and value of the cultural heritage should be aroused and developed by

1956 UNESCO New Delhi Recommendation [12],
1962 UNESCO Rec. [40],
1968 UNESCO Rec. [32],
1985 C. of E. Granada Convention [15.2],
1992 Thessaloniki Charter.

8.2ai. modern communication and promotion techniques (eg; specialized publications, articles in the press and radio and television broadcasts), which

ii. awake or increase public awareness of the nature of the dangers to cultural property arising from ill-conceived public or private works as well as cases where cultural property has been successfully preserved or salvaged, and

1982 Declaration of Tlaxcala [5a].

iii. counter the effects of the introduction by the media of patterns of consumption and behaviour foreign to indigenous traditions, which assist the destruction of the cultural heritage by encouraging a contempt for indigenous values;

1962 UNESCO Recommendation [42].

8.2bi. national and international "days", competitions and similar occasions designed to draw public attention to sites prime importance to the community;

1956 UNESCO New Delhi Recommendation [12].

ii. the organisation of guided tours, exhibitions and lectures;

1962 UNESCO Rec. [37].

iii. publicising the regulations laid down to ensure sites' protection;

1956 UNESCO New Delhi Recommendation [12],
1962 UNESCO Rec. [40].

iv. the clear display of sites;

v. the publication of cheap and simply written monographs and guides.

special case: the dangers of tourism

1976 Charter on Cultural Tourism.

8.2ci. *"All written, spoken or visual information media should express to the public the elements of the problem [of the massive development of touristic needs]."*

Museums, educational institutions and other interested organisations should

1968 UNESCO Recommendation [34].

8.2di. prepare special exhibitions on the dangers to cultural property, and

ii. on the measures which have been used to protect or to salvage endangered sites.

Private associations should

1968 UNESCO Recommendation [33].

8.2ei. have programmes which publicize the dangers to cultural property arising from short-sighted public or private works, and

ii. which underline the fact that projects to protect cultural property contribute to international understanding.

Private associations should be helped by governments to educate the public with

1962 UNESCO Recommendation [41].

8.2fi. material assistance,

ii. appropriate publicity media, such as film, radio and television programmes,

iii. material for temporary or permanent exhibitions, pamphlets and books suitable for wide distribution.

8.3 EDUCATION IN PRIMARY AND SECONDARY SCHOOLS

Respect and affection for the cultural heritage should be aroused and developed in school children by

1956 UNESCO N. Delhi [12],
1985 C.of E. Granada Convention [15.2b].

8.3ai. demonstrating the unity of the cultural heritage and the links that exist between architecture, the arts, popular tradition and ways of life;

1980 Council of Europe Rec. R (80)16 [3].

ii. *"encouraging a sense of observation, the perception of space, a critical spirit, creativity, awareness of social interdependence, a pride in past values and respect for the environment."*

1956 UNESCO New Delhi Recommendation [12].

iii. the participation of students in certain excavations.

Teachers entrusted with this task

1962 UNESCO Rec. [38],
1980 Council of Europe Rec. R(80)16, [10].

8.3bi. should be capable of choosing the most instructive type of material and keeping a sense of what is essential.

8.4 UNDERGRADUATE EDUCATION (of Architects and other Professionals)

The undergraduate teaching of architects, town planners, civil engineers and landscape designers in conservation should

1980 Council of Europe R (80)16 [4].

8.4ai. stimulate thought and hence inculcate a new philosophy of the environment, with particular reference to the architectural and natural heritage including social aspects;

ii. create an understanding of and respect for the various scientific disciplines relating to the environment and to its importance as a framework for living conditions; and

iii. prepare for co-operation, notably by joint exercises throughout the training period.

A common core should be established without prejudice to the specific character of studies in each discipline, so as

1980 Council of Europe R (80)16 [5] and [6].

8.4bi. to foster the adoption of a common language in order to create an atmosphere of interdisciplinarity and clarity, which is often lacking;

ii. to arrange basic educational subjects into three families viz:

- modes of perception of space,
- the history of the heritage and of civilisations,
- the relationship between the individual and the environment.

The teaching should

1980 Council of Europe R(80)16 [7], [8], and [14].

8.4ci. concentrate on the intelligent application of methods rather than on encyclopaedic knowledge,

ii. "*go well beyond the framework of curricula, as it is mainly of an ethical kind*",

iii. be project-based.

Teachers entrusted with this task

1980 Council of Europe R(80)16 [10].

8.4di. should be capable of choosing the most instructive type of material and keeping a sense of what is essential.

8.5 POST-GRADUATE EDUCATION (of Architects and other Professionals)

Post-graduate education and training for conservation should include the detailed study of

1980 Council of Europe R(80)16 [25].

8.5ai. the diachronic structuring of space,

ii. past and present doctrines on the conservation and restoration of monuments,

iii. composition theories and building systems throughout history both on building and town planning level,

iv. deterioration of materials and structures and appropriate means of repairing or strengthening them,

v. the regulations governing the conservation, restoration and rehabilitation of the architectural and planning heritage.

Education and training for conservation should produce professionals who are able to

1993 Education Guidelines (5).

8.5bi. read a monument, ensemble or site and identify its emotional, cultural and use significance;

ii. understand its history and technology in order to define its identity, plan for its conservation, and interpret the results of this research;

iii. understand its setting, its contents and surroundings, in relation to other buildings, gardens or landscapes;

iv. find and absorb all relevant, available sources of information;

v. understand and analyze its behaviour;

vi. diagnose intrinsic and extrinsic causes of decay as a basis for appropriate action;

vii. inspect and make reports intelligible to non-specialist readers, illustrated by graphic means such as sketches and photographs;

viii. know, understand and apply UNESCO conventions and recommendations, and ICOMOS and other recognised Charters, regulations and guidelines;

ix. make balanced judgements based on shared ethical principles, and accept responsibility for the long-term welfare of the cultural heritage;

x. recognize when advice must be sought and define the area of need of study by different specialists;

xi. give expert advice on maintenance strategies, management policies and the policy framework for environmental protection and preservation;

xii. document works executed and make this accessible;

xiii. work in multi-disciplinary groups using sound methods;

xiv. be able to work with inhabitants, administrators and planners to resolve conflicts and to develop conservation strategies appropriate to local needs, abilities and resources.

8.6 EDUCATION AND TRAINING OF CRAFTS-WORKERS

1931 Athens Conf. [VIIb],
1972 UNESCO Conv. [27],
1976 Charter on Cultural Tourism,
1982 Florence Charter [25],
1982 Desch. Decl. [V-D].
1985 C.of E. Granada Convention [10.5],
1987 Washington Charter [15],
1989 Archaeology Charter [7].

8.6a. The development of cultural properties should be followed up by the spreading of the practical knowledge required for passing on these properties to future generations and ensuring their permanent protection.

Basic training for young people intending to take up a craft should

1986 Council of Europe R(86)15 [A.a].

8.6bi. have practical work as the centrepiece, with
ii. general education and theoretical training as its vital counterparts.

Training centres should

8.6c. offer the full range of skills which medium and small sized firms, due to their specialisation, may not be able to provide for a given craft.

Teachers and instructors should

8.6di. have both practical and theoretical knowledge acquired over several years of conservation work, and
ii. should be familiar with the principles of conservation and modern restoration techniques.

Training for crafts-workers seeking advanced skills, retraining or specialization should

1986 Council of Europe R(86)15 [A.b].

8.6ei. not only include instruction in traditional techniques, but also

ii. take into account the contribution of new technologies, and
iii. the cultural enrichment of individuals;

8.6fi. be encouraged by provision for training leave and grants, by agreement between the various occupations and the authorities;
ii. be taken into account in the allocation of duties and wages.

Future site foremen and managers should
8.6g. be given special training.

A regular exchange between specialist centres should take place

1986 Council of Europe R(86)15 [D].

8.6hi. of information, experience, and
ii. of instructors, crafts-workers and students.

9

THE CONSIDERATION OF RELATED FACTORS

We began this guide to Charters by looking at the reasons given for treating some parts of the environment with extra care. It seems appropriate to end with a view of what might be called the opposing side - though this is not a strictly true description. Some of the interests which will be discussed can work with conservation aims to their mutual benefit.

Protected sites are literally the very fabric of our society and inevitably they are affected, for good or ill, by all our other needs and wants. Even the significance they have for us can rise or fall depending on society's more pressing needs, so the benefits of protecting buildings are compared to the inconveniences on a permanently sliding scale. To add to the confusion, different sections of society can hold completely opposing sets of value at exactly the same time. Some current trends, like sustainability, self-sufficiency and cultural diversity, in general award high value to protecting the environment. Some trends from the recent past, such as consumerism, market-driven global economics, and short-term property speculation, tend to put a very low value on the existing physical framework.

On the whole, Charters are positive documents. They have never tried to stop change, only to look for ways that can improve our lives without destroying the qualities we already enjoy. In all, they strongly support and encourage the continuous and normally evolving use of protected sites.

All protected sites, by definition, have an enormously important role to play in contemporary life. They are protected because they bring some outstanding benefit to society just by existing in their present state - as authentic evidence of our past, as a structure to support our more vulnerable cultural traditions, or for any of the other equally valued characteristics discussed in Chapter 1. So should we be asking even more of an environment which already give us so much? Should we be demanding that they carry out ordinary everyday tasks as well as the outstanding work only they can perform?

There is no reason why they should not - and many reasons why they should - as long as no harm comes to the fabric and no damage is done to their "cultural significance" in the process. In many cases (even more in areas of towns and villages than in single buildings) a great part of a site's value **is** its use as a "living" part of the community[52]. When these sites are taken out of "normal" use their value inevitably falls or, at best, changes significantly. On the other hand, a site in "normal" use has to tolerate the continuous minor alterations of everyday life[53]. The sometimes invidious choice between the disadvantages of "normal" and "abnormal" use is one of the persistent dilemmas of conservation work.

So what do the Charters say? The *Venice Charter* (article 5) recommends that a protected site should be put to a socially useful purpose, but only for the practical reason that, by doing

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[52]This is referred to as "use value" in the 1975 *Declaration of Amsterdam* (p.7) and in the *Recommendation concerning the safeguarding and contemporary role of historic areas*, UNESCO (Nairobi:1976), article 33.

[53]We face much the same choice as naturalists; whether whales are better conserved by regulating the life of single specimens in a marina (taking them out of their normal existence), or by regulating the greatest dangers to their survival (eg, the level of hunting and man-made pollution) and leaving the whales themselves alone (to live a normal life with all its risks and natural hazards).

so, its conservation always becomes much easier. The proper maintenance of a building in full and healthy use is a battle half won compared to the problems of conserving a derelict and deserted shell. The *Deschambault Declaration* also urges measures to make protected sites "*accessible and useful*" but adds that such measures should, if necessary, "*make it possible to reintroduce them into the daily life of the people of Quebec*" (V-B). The Charter then faces the social aspects of "cultural significance" with the unequivocal statement that

> *The preservation of the dynamic and functional character of our heritage is ensured by local residents who are an integral part of that heritage and contribute to its protection and its vitality.* (IX)

A similar view was taken in the Council of Europe's Granada Convention of 1985, in which each Party undertook to foster "*the use of protected properties in the light of the needs of contemporary life*" with, of course, due regard to the "*architectural and historical character of the heritage*" (11).

In the special case of sites destroyed by war, the *Declaration of Dresden* noticed that this type of destruction often increased public awareness of the value of the site or even changed and raised that value, which resulted in completely new objectives for social use after reconstruction, and sometimes in efforts to find a use of great public significance (9, 10).

Many small adjustments can be made to fit the changing needs of the inhabitants without any significant effect on cultural significance (excepting, of course, in the case of the few sites of such extraordinary value that only the fabric's health justifies physical interference). And, as the previous chapters have described, these limits to alterations are carefully worked out, clearly stated and simple to follow. By observing such guidelines, the wear and tear of the inhabitants can be regulated and moderated to acceptable levels.

While there is always some danger that the quality of a site may be affected by small shifts in its contemporary role, the risk is slight and relatively easy to control. The real danger comes from activities that allow our existing environment no contemporary role at all and whose aims devalue or even deny its qualities. At times when the actions of other powerful lobbies have been particularly hostile to our valued surroundings, Charters have formed one of the foremost defences of the environmental interests of the public. Pointing out ways of accommodating or at least moderating the demands of competing interests, and illustrating the drawbacks inherent in some types of "progress" for society as a whole has become a major part of their task. Their signatories have taken an aggressive stance only when some aspects of contemporary life have threatened its general quality; when, for instance, there is a danger that "*a growing universality of building techniques and architectural forms may create a uniform environment throughout the world*"[54]; when national cultures are threatened by "*the corrupting influence of vulgar mass-produced culture*"[55]; and when communities are "*threatened, physically degraded, damaged or even destroyed, by the impact of the urban development that follows industrialisation in societies everywhere*"[56]. In the words of the *Deschambault Declaration*, "*modernization and the pursuit of new lifestyles, have, in fact, relentlessly*

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[54]Preamble, *Nairobi Recommendation*, UNESCO, 1976.

[55]Article I.1, *Recommendations of the Intergovernmental Conference on Cultural Policies in Asia*, UNESCO (Yogyakarta, 1973).

[56]Preamble, *Washington Charter*, ICOMOS, 1987.

imperilled national heritages everywhere" (3).

All the following guidelines attempt to harmonize the preservation of the cultural heritage with the changes which follow from social and economic development, and all make the "*serious efforts to meet both requirements in a broad spirit of understanding, and with reference to appropriate planning*" which were advocated by UNESCO in 1968. All the issues which they confront have the potential to damage the cultural heritage, but nearly all can be controlled. This leaves the dangers, like warfare, that are beyond any hope of control by conservation interests alone, and those, like earthquakes, hurricanes and volcanic eruptions, which are impossible to avert. This Chapter ends with the advice for action in such inescapable situations where pre-planning and post-disaster organisation can at least moderate if not prevent some of the worst effects.

9.1 DEVELOPMENT

Ways in which development policies, if planned sympathetically, can be used to aid the conservation of older neighbourhoods:

1975 Council of Europe, Decl. of Amsterdam [p.5].

9.1ai. The development of peripheral urban areas could be designed in a way that reduce pressure on older neighbourhoods.

ii. The depopulation of areas in economic decline could be checked by inducing new activities to establish themselves, and so prevent the disuse and dilapidation of the building stock which accompanies it.

Ways in which any bias against conservation schemes in the formulation of development policies should be redressed:

1975 Council of Europe, Decl. of Amsterdam [pp. 7, 8],
1976 UNESCO, Nairobi Rec. [33].

9.1bi. Social costs should be included in comparative assessments of rehabilitation, new build on existing infrastructure and new build on green field sites.

1975 Council of Europe, Decl. of Amsterdam [pp.9,10],
1976 UNESCO, Nairobi Rec. [37, 38, 40, 42].

ii. Legislation should be enacted "to ensure a balanced allocation of budgetary resources between rehabilitation and redevelopment respectively".

iii. Citizens who decide to rehabilitate a building should be granted "*at least the same financial advantage as which they enjoy for new construction*", and

iv. should be helped with any extra cost incurred through constraints specific to conservation practice.

See also,
7.5 Financial measures.

Ways in which a bias in favour of conservation schemes should be established:

1975 Council of Europe, Decl. of Amsterdam [pp.9,10],
1968 UNESCO Rec. [24b].

9.1ci. Planning regulations should discourage increased density and promote rehabilitation rather than redevelopment, and

ii. building regulations should also be relaxed as far as

possible to meet conservation needs.

1985 Council of Europe [9].
See also,
7.4 Punitive measures.

iii. Infringements of the law protecting cultural property should meet with a relevant and adequate response, including the demolition of newly erected work and the full reconstruction of illegally demolished work.

special case: archaeological sites

1989 Archaeological Charter [3].

9.1di. Impact studies should be prepared before implementation and included in the project costs, and

ii. development should be designed for minimum impact.

Private or public works most likely to damage or destroy cultural property:

1962 UNESCO Recommendation [7],
1968 UNESCO Recommendation [8].

9.1ei. urban expansion and renewal projects which destroy historical relationships and the setting of historic quarters by removing the less important structures in the vicinity of scheduled monuments;

ii. injudicious modifications and repair of individual historic buildings;

iii. the construction of pipelines, power lines, of dams for irrigation, hydro-electricity or flood control, of airfields, etc; and

iv. mining and quarrying operations, dredging and reclamation of channels and harbours, farming operations such as deep ploughing and afforestation.

Some dangers from development specific to smaller towns:

1975 Bruges Resolutions [3],
1982 Declaration of Tlaxcala [[3].
See also,
7.1 Administrative measures.

9.1fi. economic activity of such an extent that the old structure is disrupted;

ii. increases in the unit size of the social infrastructure such as schools and hospitals which destroy the scale of the town and reduce the level of its services.

9.2 POLLUTION

Sites of cultural significance should be protected from the harmful effects of pollution by

1976 UNESCO Nairobi Recommendation [31].

9.2ai. banning harmful industries in their proximity;

1962 UNESCO Recommendation [7, 8, 24].

ii. taking preventive measures to counter the destructive effects of noise, shocks and vibrations caused by machines and vehicles;

1931 Athens Conference [VI],
1985 C. of Europe, Granada

iii. supporting scientific research to identify and analyze harmful effects of pollution, and defining ways and

Convention [8.1],
1987 Washington Ch. [14].

means to reduce or eradicate these effects; and

1985 C.of Europe, Granada Convention [8.2],
1987 Washington Ch. [14].

iv. the special problems of conservation should be take into consideration in anti-pollution policies.

9.3 TRAFFIC

Sites of cultural significance should be protected from the harmful effects of traffic by

1987 Washington Cht. [12].

9.3ai. controlling traffic inside historic towns (with a bias towards the good of the fabric),

1962 UNESCO Rec. [7b],
1976 UNESCO, Nairobi Recommendation [32].

ii. encouraging and assisting local authorities to seek solutions to the conflict existing in most historic groupings between motor traffic on the one hand and the scale of the buildings and their architectural quality on the other,

1987 Washington Charter [13].

iii. designing parking areas which do not disturb the historic fabric or degrade the environment.

Historic towns should be protected against

1987 Washington Charter [14].

9.3b. pollution and vibration not only to safeguard the heritage, but also for the security and well-being of the local people.

Public access to protected properties should be allowed only to the extent that it does not

1982 Florence Charter [18],
1985 C. of Europe Granada Convention [12],

9.3ci. adversely affect the architectural and historical character of such properties and their surroundings (particularly in the case of structural development); and

See also,
6.2 Design of new works.

1987 Washington Charter [14].

ii. major motorways must not be permitted to penetrate an historic town, but they should improve access to it.

9.4 TOURISM

Ways in which tourist activities can be planned sympathetically, and used to aid the conservation of older neighbourhoods:

1976 Charter of Cultural Tourism [basic position 4].

9.4ai. *"Respect of the world cultural and natural heritage must take precedence over any other considerations however justified these may be from a social, political or economic point of view."*

1990 Canterbury Resolutions

ii. It should be a fundamental principle of any tourist

[3.2].

development plan that both conservation, in its widest sense, and tourism benefit from it.

1990 Canterbury Resolutions [1], [3.7].

iii. The acceptable level of tourism should first be defined and a comprehensive plan made as a pre-condition of any development,
then

9.4bi. controls should be provided to limit tourist development to that level and,

1976 Charter of Cultural Tourism [4].

ii. based on the limitations of use and of density, a policy should be drawn up on the siting of equipment and the movement of tourists.

"*Additionally one must condemn any siting of equipment or services in contradiction with the prime preoccupation due to the respect we owe to the existing cultural heritage*".

1990 Canterbury Resolutions [6].

iii. Tourist facilities should be designed to minimise their harmful visual effect.

1990 Canterbury Resolutions [3.3].

9.4ci. A significant proportion of revenue earned from tourism should be applied for the benefit of conservation, both nationally and regionally.

1990 Canterbury Resolutions [5].

ii. The sponsorship of tourism should be placed in the same government department as the sponsorship of heritage interests in order to secure an integrated approach.

special case: cultural tourism (ie, that form of tourism whose object is, among other aims, the discovery of monuments and sites)

1976 Charter of Cultural Tourism [basic position 4],
1976 UNESCO Nairobi Recommendation [31].

9.4di. "*Whatever ... may be its motivations and the ensuing benefits,* ***cultural tourism*** *cannot be considered separate from the negative, despoiling or destructive effects which the massive and uncontrolled use of monuments and sites entails*",
but

1976 Charter of Cultural Tourism [basic position 3].

ii. cultural tourism exerts a very positive effect in so far as it contributes - to satisfy its own needs - to the maintenance and protection of monuments and sites.

iii. It also justifies the efforts which maintenance and protection demand of the human community, because of the socio-cultural and economic benefits which they bestow on all the population concerned.

9.5 THE INTERPRETATION OF SITES

When the interpretation of a site is appropriate,

1992 N. Zealand Charter [21], 1964 Venice Charter [14].

9.5ai. it should not compromise the values, appearance, structure and materials of a place, or

ii. intrude upon the experience of a place.

1964 Venice Charter [15], 1989 Archaeological Charter [7].

9.5bi. It should promote the understanding of the site without ever distorting its meaning, and

ii. it might also promote an understanding of the need for the site's conservation.

Presentation and information should

1989 Archaeological Charter [7].

9.5ci. be revised frequently, and

ii. take account of the multi-faceted approaches to an understanding of the past.

9.6 NATURAL DISASTERS (including damage by fire, flood, earthquake and high winds or tornados)

1993 Council of Europe, Recommendation (No.R(93)9).

"*Noting that human life and its quality should always take priority but that strategies for the protection of the architectural heritage can also protect human life*", these should consist of:

1992 N. Zealand Charter [7].

9.6ai. an assessment of potential risk,

1993 C.of E. Rec. R(93)9 [II.2].

ii. a register of sites, with priority to be given to buildings and objects of greatest importance and to those most at risk,

1992 N. Zealand Charter [7].

iii. the preparation of risk mitigation plan, and

iv. action to minimise significant risk, while noting

1976 UNESCO Nairobi Recommendation [27], 1993 Council of Europe R(93)9 [II.11].

9.6bi. there is a need for special solutions to provide maximum security while not impairing cultural heritage,

ii. if conflict occurs between the usual security standards applicable to fire and natural catastrophe and criteria to protect cultural heritage in any urban development or slum clearance programme.

Strategies for action once the disaster has occurred should consist of

1974 Antigua Resolutions [I]. 1987 Washington Charter [14].

9.6ci. a guide to emergency operations, noting

ii. that preventative and repair methods must be adapted to the new specific character of the properties concerned, and

1974 Antigua Resolutions [II].

iii. a register of all experience and relevant data.

9.7 WAR

Soon after the Second World War, nearly all nations agreed and signed *The Hague Convention for the Protection of Cultural Property in the Event of Armed Conflict* (UNESCO) of 1954. It is a lengthy document, and only the main points from its forty articles, twenty-one additional regulations (some with up to eight sub-clauses), one protocol and three resolutions have been extracted. Its signatories

a. agreed on what could be defined as cultural property [Chpt. I.1],

b. agreed to grant it special protection [Chpt. II.8],

c. agreed on its immunity from any act of hostility, provided it was not used for military purposes and was situated away from a military objective [Chpt. II.9, 10, 11],

d. agreed to its distinctive marking (emblem) [Chpt. V].

In addition, the protocol contains an agreement to

e. return property exported against the principles of the Convention at the close of hostilities, and never to retain it as war reparations [I.3].

Note: The obligation to refrain from using protected property for purposes likely to expose it to destruction or damage in the event of armed conflict, and to refrain from any act of hostility directed against it [Chpt. I.4.1] may be waived where military necessity imperatively requires such a waiver [Chpt. I.4.2].

While the Convention allows for the appointment of delegates to investigate violations and to make representations locally [Reg. Chpt.1], no regulation covers reparation or compensation for damage. Those who commit or order to be committed a breach of the Convention are to be prosecuted only under the framework of the ordinary criminal jurisdiction [Chpt. VII.28].

It was also agreed that the signatories would undertake

f. to foster in the members of the armed forces a spirit of respect for the culture and cultural property of all peoples (Chpt. I.7.1),

g. to plan or establish in peace time within the armed forces services or specialist personnel whose purpose will be to ensure respect for cultural property (Chpt.I.7.2), and

h. to introduce in times of peace into their military regulations or instructions such provisions as may ensure observance of the convention.

As the recent war in what was formerly known as Yugoslavia has shown, none of these measures, now in place for over forty years, has had the slightest effect on the behaviour of armies once conflict is underway[57]. Indeed some are totally counterproductive; for example, sites marked with the "distinctive symbol" (**d**) have been specifically targeted for attack proving, if nothing else, that **cultural significance** is not an empty phrase.

> *"The policy of the ethnically clean territory, in other words territory inhabited only by the members of one particular nation, also implies the uniformity of a cultural area. Cultural and historical monuments, as material proof of the existence of different nations and their cultures in a certain area are not acceptable in such a political concept. They are callously removed, either in combat or by deliberate destruction. According to the Council of Europe reports on the destruction ... besides considerable damage in the war, a large number of monuments was also destroyed after the completion of military operations ..."*[58]

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[57] *Report on the destruction by war of the cultural heritage in Croatia and Bosnia-Herzegovina*, Council of Europe, Strasbourg, ADOC: 6756; 6869; 6904; 6989; 6999; 7070 (1993-4).

[58] "Cultural Heritage in a catastrophical situation", Miljenka Fischer (a member of the Institute of History of Art, Zagreb, Croatia), *Conservation Training - Needs and Ethics*, ICOMOS Finnish National Committee, 1995.

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- *Recommendation R(89)5 on the protection and enhancement of the archaeological heritage in the context of town and country planning operations*, 1989.
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documentation

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COUNCIL of EUROPE
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landscapes

UNESCO
- *Recommendation concerning the safeguarding of the beauty and character of landscapes*, 1962.
- *Convention concerning the protection of the world cultural and natural heritage*, 1972.

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- (ICOMOS - IFLA) *Florence Charter for Historic Gardens*, 1981.

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COUNCIL of EUROPE

- *Resolution [(76) 28] concerning the adaption of laws and regulations to the requirements of integrated conservation of the architectural heritage (including fiscal measures)*, 1976.
- *Convention for the protection of the architectural heritage of Europe*, 1985.
- *Recommendation R(91)6 on measures likely to promote the funding of the conservation of the architectural heritage*, 1991.

modern architecture

ICOMOS

- *Budapest Symposium Resolutions on the introduction of contemporary architecture into ancient groups of buildings*, 1972.

COUNCIL of EUROPE

- *Recommendation R(91)13 on the protection of the twentieth-century architectural heritage*, 1991.

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- *Recommendation concerning the safeguarding and contemporary role of historic areas*, 1976.

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- *Bruges Resolutions on the conservation of smaller historic towns*, 1975.
- (ICOMOS Mexico) *Declaration of Tlaxcala on the revitalisation of small settlements*, 1982.
- (ICOMOS Canada) *Deschambault Declaration, Charter for the Preservation of Quebec's Heritage*, 1982.
- *Washington International Charter for the Conservation of Historic Towns and Urban Areas*, 1987.
- (ICOMOS Brazil), *Petropolis (Itaipava) Charter on the Preservation and Revitalisation of Historic Centres*, 1987.

COUNCIL of EUROPE

- *The European Charter of the Architectural Heritage*, 1975.
- *The Declaration of Amsterdam*, 1975.
- *Recommendation R(86)11 on Urban Open Space*, 1986.

training and education

ICOMOS

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[60]ibid.

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APPENDIX I

THE CHARTERS AND THEIR MAKERS

UNESCO (United Nations' Educational and Scientific Organisation)

Date of founding: 1945 when the League of Nations became the United Nations Organisation, and the International Committee of Intellectual Co-operation was succeeded by UNESCO.

Organisation: intergovernmental, controlled by General Assembly (meets every two years), run by internationally staffed Directorate. Cultural Heritage Division deals with Conservation issues.

Influence: through its Conventions and Recommendations accepted by Member States, and through the Intergovernmental Committee for the Protection of the World Cultural and Natural Heritage of Outstanding Universal Value established in the Convention of 16 Nov. 1972.
The World Heritage List and the List of World Heritage in Danger are established on the basis of inventories made by each member state, and the World Heritage Fund exists to aid property on either list, by funding commissions and reports and assisting training through grants.

COUNCIL of EUROPE

Aim: to promote European unity by protecting and strengthening pluralist democracy and human rights and by working out common solutions to social problems, and, specifically, to encourage awareness of a common European cultural identity.

Within the Cultural Heritage sector it seeks to foster the advancement of heritage protection and enhancement policies within the framework of a pan-European project of cultural and social development, and to develop a model for European society where the right to a heritage, that is, the right to a memory and to a better living environment, could constitute a new generation of human rights, after political rights, social rights and the right to information[61].

Date of founding: 1949

Organisation: intergovernmental political organisation, distinct from the European Community, with membership of 32 pluralist democracies[62] in Europe (1994), including the twelve states of the European Community (38 states

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[61] *European Heritage*, no.1, 1994, p. 10.

[62] Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Liechtenstein, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, San Marino, Slovakia, Spain, Sweden, Switzerland, Turkey, United Kingdom.

have acceded to the European Cultural Convention and take part in the Council's work on education, culture, heritage, sport and youth[63].)

Influence: Committee on Culture and Education, and the Sub-Committee on the Architectural and Artistic Heritage define programmes and major policy guidelines (broad lines of action on heritage issues), organise and design pan-European action and co-operation, and work on specific issues with various partners and select committees of experts.
The technical co-operation and assistance programme offers aid in the drawing up of overall strategies in liason with competant authorities, and the definition of priorities and practical measures. The Pro Venetia Viva Foundation is to be adapted to become the European Foundation for Heritage Skills, and the setting up of a Cultural Heritage Fund is under discussion at present.

ICOMOS (International Council on Monuments and Sites)

Aim: to promote the theory, methodology and technology applied to the conservation, protection and promotion of the worth of monuments and historic areas.

Date of founding: 1965, in Warsaw after the Venice Charter.
Organisation: international and non-governmental, with 14 International Committees of experts, 60 national committees and c.3500 members.

Influence: statutory responsibility to advise UNESCO Committee for the Protection of the World Cultural and Natural Heritage of Outstanding Universal Value, manages records of listed property, participates in development of training centres **but** mainly through publication of scientific works and the 14 International Committees of experts: ie archaeological heritage (ICAHM), historic gardens and sites (assoc. with IFLA), historic towns and villages (CIVVIH), rock art (CAR), underwater heritage, vernacular architecture (CIAV), earthen structures (assoc. with CRATerre-EAG), painted and stained glass, photogrammetry (CIPA), stone, wood (IWC), cultural tourism, education (CIF), conservation economics.

[63] Albania, Belarus, Croatia, Holy See, Latvia and Russia in addition to member states.

CHRONOLOGICAL LIST OF CHARTERS

(only the more widely known Charters, Resolutions and Recommendations have been included)

UNESCO

1937 The International Conference on Excavations.

1954 The Hague **Convention** on the protection of cultural property in the event of armed conflict.

1956 New Delhi **Recommendation** on International Principles applicable to Archaeological Excavations.

1962 **Recommendation** concerning the safeguarding of the beauty and character of landscapes.

1964 **Recommendation** on the Means of Prohibiting and Preventing the Illicit Export, Import and Transfer of Owneership of Cultural Property.

1968 **Recommendation** concerning the preservation of cultural property endangered by public or private works.

1970 **Convention** on the means of prohibiting and preventing the illicit import, export and transfer of ownership of cultural property.*

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1972 Yazd **Resolutions** on the conservation of monuments built on unbaked brick and earth.

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1969 **Convention** on the Protection of the Archaeological Heritage.

	Policies in Africa.		Vernacular and Rural Architecture.		
1976	**Recommendation** concerning the safeguarding and contemporary role of historic areas.	1974	Santo Domingo **Resolutions.**		
		1974	Antigua **Resolutions** on the conservation of monuments in earthquake zones.		
1976	**Recommendation** concerning the International Exchange of Cultural Property.	1975	Plovdiv **Recommendations** of the Symposium on Vernacular Architecture and its Adaption to the Needs of Modern Life.	1975	Amsterdam **Charter** of the Architectural Heritage.
				1975	The **Declaration of Amsterdam.**
1977	**Operational Guidelines** for the Implementation of the World Heritage Convention.			1976	**Resolution** [(76) 28] concerning the adaption of laws and regulations to the requirements of integrated conservation of the architectural heritage (including fiscal measures).
1978	**Recommendation** for the Protection of Movable Cultural Property.	1975	Bruges **Resolutions** on the conservation of smaller historic towns.		
		1976	**Charter** of Cultural Tourism.		
		1976	Yazd **Resolutions** on Monuments in Mud Brick.		
		1979	Australian ICOMOS **Burra Charter** for the Conservation of Places of Cultural Significance.		
1980	**Recommendation** for the Safeguarding and Preservation of Moving Images.	1981	ICOMOS - IFLA **Florence Charter** for Historic Gardens.	1980	**Recommendation** [R(80)16] on the specialised training of architects, town planners, civil engineers and landscape designers.
		1982	ICOMOS Canada **Deschambault Declaration**, Charter for the Preservation of Quebec's Heritage.	1981	**Recommendation** R(81)13] on action in aid of certain declining craft trades in the context of craft activity.
		1982	**Declaration of Dresden**, Reconstruction of Monuments Destroyed by War.		
		1982	ICOMOS Mexico **Declaration of Tlaxcala** on the revitalisation of small settlements.		
		1983	ICOMOS Canada, **Appleton Charter** for the Protection and Enhancement of the Built Environment.		
		1984	ICOMOS Bulgaria, **Plovdiv Charter** on vernacular architecture.	1984	**Resolutions** of the Athens Conference of Ministers of the Environment.
		1986	**Bokrijk Charter** on vernacular architecture.	1986	**Recommendation** R(86)11 on Urban Open Space.
		1987	**Washington Charter** for the Conservation of Historic Towns and Urban Areas.	1986	**Recommendation** R(86)15 on the promotion of craft trades involved in the conservation of the architectural heritage.
		1987	ICOMOS Brazil, **Petropolis** (or Itaipava) **Charter** on the		
1989	Draft Medium Term Plan				

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1988 **Recommendation** R(88)5 on control of the physical deterioration of the architectural heritage accelerated by pollution.

1989 **Recommendation** R(89)5 on the protection and enhancement of the archaelogical heritage in the context of town and country planning operations.

1989 **Recommendation** R(89)6 on the protection and enhancement of the rural architectural heritage.

1990 **Recommendation** R(90)20 on the protection and conservation of the industrial, technical and civil engineering heritage in Europe.

1991 **Recommendation** R(91)6 on measures likely to promote the funding of the conservation of the architectural heritage.

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1991 Cracow **Resolutions** of the Symposium of CSCE States.

1992 Malta **Convention** for the Protection of the Architectural Heritage of Europe (Info. doc. MPC (91) 6 Malta).

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1993 **Recommendation** R(93)9 on the protection of the architectural heritage against natural disasters.

1995 Segesta **Declaration**.

(in preparation)

Recommendation on the Conservation and Management of Cultural Landscape Areas as Part

	conservation).	of Landscape Policies.
1996	Sofia **Principles** for the Recording of Monuments, Groups of Buildings and Sites, 1996.	**Recommendation** on documentation methods and systems related to historic buildings and monuments of the architectural heritage.

* (See also EC Regulation 3991/92 on exportation of cultural goods, Directive no.92.1 on the restitution of cultural goods exported illegally from a member state, and Regulation 752/93 on regulating the export of cultural goods both inside and outside the European Union.)

APPENDIX II

John Ruskin, *The Seven Lamps of Architecture*, "The Lamp of Memory" (1849), XVIII.

... Neither by the public, nor by those who have the care of public monuments, is the true meaning of the word *restoration* understood. It means the most total destruction which a building can suffer: a destruction out of which no remnants can be gathered; a destruction accompanied by false description of the thing destroyed. Do not let us deceive ourselves in this important matter; it is *impossible*, as impossible as to raise the dead, to restore anything that has been great or beautiful in architecture. That which I have above insisted upon as the life of the whole, that spirit which is given only by the hand and eye of the workman, never can be recalled. Another spirit may be given by another time, and it is then a new building; but the spirit of the dead workman cannot be summoned up and commanded to direct other hands, and other thoughts. And as for direct and simple copying, it is palpably impossible. What copying can there be of surfaces that have been worn down half an inch? The whole finish of the work was in the half inch that is gone; if you attempt to restore that finish, you do it conjecturally; if you copy what is left, granting fidelity to be possible (and what care, or watchfulness, or cost can secure it?), how is the new work better than the old? There was yet in the old *some* life, some mysterious suggestion of what it had been, and of what it had lost; some sweetness in the gentle lines which rain and sun had wrought. There can be none in the brute hardness of the new carving. ... The first step to restoration (I have seen it, and that again and again, seen it on the Baptistery of Pisa, seen it on the Casa d'Oro at Venice, seen it on the Cathedral of Lisieux), is to dash the old work to pieces; the second is usually to put up the cheapest and basest imitation which can escape detection, but in all cases, however careful, and however labored, an imitation still, a cold model of such parts as *can* be modelled, with conjectural supplements; and my experience has yet furnished me with only one instance, that of the Palais de Justice at Rouen, in which even this, the utmost degree of fidelity which is possible, has been attained or even attempted.

XIX. Do not let us talk then of restoration. The thing is a Lie from beginning to end. You may make a model of a building as you may of a corpse, and your model may have the shell of the

Society for the Protection of Ancient Buildings, Manifesto (1877).

... No doubt within the last fifty years a new interest, almost like another sense, has arisen in these ancient monuments of art; and they have become the subject of one of the most interesting of studies, and of an enthusiasm, religious, historical, artistic, which is one of the undoubted gains of our time; yet we think that if the present treatment of them be continued, our descendants will find them useless for study and chilling to enthusiasm. We think that those last fifty years of knowledge and attention have done more for their destruction than all the foregoing centuries of revolution, violence and contempt.

For Architecture, long decaying, died out, as a popular art at least, just as the knowledge of mediaeval art was born. So that the civilised world of the nineteenth century has no style of its own amidst its wide knowledge of the styles of other centuries. From this lack and this gain arose in men's minds the strange idea of the Restoration of ancient buildings; and a strange and most fatal idea, which by its very name implies that it is possible to strip from a building this, that, and the other part of history - of its life that is - and then to stay the hand at some arbitrary point, and leave it still historical, living, and even as it once was.

In early times this kind of forgery was impossible, because knowledge failed the builders, or perhaps because instinct held them back. If repairs were needed, if ambition or piety pricked on to change, that change was of necessity wrought in the unmistakable fashion of the time; a church of the eleventh century might be added to or altered in the twelfth, thirteenth, fourteenth, fifteenth, sixteenth, or even the seventeenth or eighteenth centuries; but every change, whatever history it destroyed, left history in the gap, and was alive with the spirit of the deeds done midst its fashioning. The result of all this was often a building in which the many changes, though harsh and visible enough, were, by their very contrast, interesting and instructive and could by no possibilirty mislead. But those who make the changes wrought in our day under the name of Restoration, while professing to bring back a building to the best time of its history, have no guide but each his own individual whim to point out to them what is admirable and what contemptible; while the very nature of their tasks compels them to destroy something and to supply the gap by imaging what the early builders should or might have done. Moreover, in the course of this double process of destruction and addition the whole surface of the building is necessarily tampered with; so that the appearance of antiquity is taken away from such old parts of the fabric as are left, and there is no laying to rest in the spectator the suspicion of what may have been lost; and, in short, a

old walls within it as your cast might have the skeleton, with what advantage I neither see nor care; but the old building is destroyed, and that more totally and mercilessly than if it had sunk into a heap of dust, or melted into a mass of clay: more has been gleaned out of desolated Nineveh than ever will be out of rebuilt Milan. But, it is said, there may come a necessity for restoration! Granted. Look the necessity full in the face, and understand it on its own terms. It is a necessity for destruction. Accept it as such, pull the building down, throw the stones into neglected corners, make ballast of the mortar, if you will; but do it honestly, and do not set up a Lie in their place. And look that necessity in the face before it comes, and you may prevent it. The principle of modern times ... is to neglect buildings first, and restore them afterwards. Take proper care of your monuments, and you will not need to restore them. A few sheets of lead put in time upon the roof, a few dead leaves and sticks swept in time out of a water-course, will save both roof and walls from ruin. Watch an old building with anxious care; guard it as best you may, and at *any* cost from every influence of dilapidation. Count its stones as you would the jewels of a crown; set watches about it as if at the gates of a beseiged city; bind it together with iron where it loosens; stay it with timber where it declines; do not care about the unsightliness of the aid; better a crutch than a lost limb; and do this tenderly, and reverently, and continually, and many a generation will still be born and pass away beneath its shadow. Its evil day must come at last; but let it come declaredly and openly, and let no dishonoring and false substitute deprive it of the funeral offices of memory.

XX. Of more wanton or ignorant ravage it is vain to speak; my words will not reach those who commit them, and yet, be it heard or not, I must not leave the truth unstated, that it is again no question of expediency or feeling whether we shall preserve buildings of past times or not. *We have no right whatever to touch them.* They are not ours. They belong partly to those who built them and partly to all the generations of mankind who are to follow us. ...

feeble lifeless forgery is the final result of all the wasted labour.

It is sad to say, that in this manner most of the bigger Minsters, and a vast number of more humble buildings, both in England and on the Continent, have been dealt with by men of talent often, and worthy of better employment, but deaf to the claims of poetry and history in the highest sense of the words.

For what is left we plead before our architects themselves, before the official guardians of buildings, and before the public generally, and we pray them to remember how much is gone of the religion, thought and manners of times past, never by almost universal consent, to be Restored; and to consider whether it be possible to Restore these buildings, the living spirit of which, it cannot be too often repeated, was an inseperable part of that religion and thought and those past manners. For our part we assure them fearlessly, that of all Restorations yet undertaken the worst have meant the reckless stripping a building of some of its most interesting material features; while the best have their exact analogy in the Restoration of an old picture, where the partly-perished work of the ancient craftsman has been made neat and smooth by the tricky hand of some unoriginal and thoughtless hack of today. If, for the rest, it be asked us to specify what kind of amount of art, style, or other interest in a building, makes it worth protecting, we answer, anything which can be looked on as artistic, picturesque, historical, antique, or substantial: any work, in short, over which educated, artistic people would think it worth while to argue at all.

It is for all those buildings, therefore, of all times and styles, that we plead, and call upon those who have to deal with them to put Protection in the place of Restoration, to stave off decay by daily care, to prop a perilous wall or mend a leaky roof by such means as are obviously meant for support or covering, and show no pretence of other art, and otherwise to resist all tampering with either the fabric or ornament of the building as it stands; if it has become inconvenient for its present use, to raise another building rather than alter or enlarge the old one; in fine to treat our ancient buildings as monuments of a bygone art, created by bygone manners, that modern art cannot meddle with without destroying. Thus, and thus only, shall we escape the reproach of our learning being turned into a snare to us; thus, and thus only, can we protect our ancient buildings, and hand them down instructive and venerable to those that come after us.

This guide, the eighth in *Historic Scotland*'s Technical Advice Note series, brings together for the first time and analyses over seventy international statements of conservation principles. It will be of value to practioners, conservation students and tutors and all others concerned with the conservation of Scotland's built heritage.