















Introduction course on Theory and History of Conservation



THEORY AND HISTORY OF CONSERVATION

11. VENICE CHARTER 1964 ITALIAN CHARTER 1972



Prof. Calogero Bellanca

Introduction Course on Theory and History of Conservation

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	PROGRAMME OF LECTURES	LECTURES	EXERCISE	DESIGN	
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2	Introduction and recall to basic concepts, linking the definition of Conservation/Restoration. Terminology. Critic Restoration, Pure Conservation, Critic-Conservative Restoration	3	2		
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ELEVENTH LESSON: THEORY AND HISTORY OF CONSERVATION





VENICE CHARTER 1964



International Council on Monuments and Sites

INTERNATIONAL CHARTER FOR THE CONSERVATION AND RESTORATION OF MONUMENTS AND SITES (THE VENICE CHARTER 1964)

IInd International Congress of Architects and Technicians of Historic Monuments, Venice, 1964.

Adopted by ICOMOS in 1965.

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. People are becoming more and more conscious of the unity of human values and regard ancient monuments as a common heritage. The common responsibility to safeguard them for future generations is recognized. It is our duty to hand them on in the full richness of their authenticity.

It is essential that the principles guiding the preservation and restoration of ancient buildings should be agreed and be laid down on an international basis, with each country being responsible for applying the plan within the framework of its own culture and traditions.

By defining these basic principles for the first time, the Athens Charter of 1931 contributed towards the development of an extensive international movement which has assumed concrete form in national documents, in the work of ICOM and UNESCO and in the establishment by the latter of the International Centre for the Study of the Preservation and the Restoration of Cultural Property. Increasing awareness and critical study have been brought to bear on problems which have continually become more complex and varied; now the time has come to examine the Charter afresh in order to make a thorough study of the principles involved and to enlarge its scope in a new document.

Accordingly, the IInd International Congress of Architects and Technicians of Historic Monuments, which met in Venice from May 25th to 31st 1964, approved the following text:







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DEFINITIONS

Article 1.

The concept of a historic monument embraces not only the single architectural work but also the urban or rural setting in which is found the evidence of a particular civilization, a significant development or a 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.

Article 2.

The conservation and restoration of monuments must have recourse to all the sciences and techniques which can contribute to the study and safeguarding of the architectural heritage.

Article 3.

The intention in conserving and restoring monuments is to safeguard them no less as works of art than as historical evidence.

CONSERVATION

Article 4.

It is essential to the conservation of monuments that they be maintained on a permanent basis.

Article 5.

The conservation of monuments is always facilitated by making use of them for some socially useful purpose. Such use is therefore desirable but it must not change the lay-out or decoration of the building. It is within these limits only that modifications demanded by a change of function should be envisaged and may be permitted.





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Article 6.

The conservation of a monument implies preserving a setting which is not out of scale. Wherever the traditional setting exists, it must be kept. No new construction, demolition or modification which would alter the relations of mass and colour must be allowed.

Article 7.

A monument is inseparable from the history to which it bears witness and from the setting in which it occurs. The moving of all or part of a monument cannot be allowed except where the safeguarding of that monument demands it or where it is justified by national or international interest of paramount importance.

Article 8.

Items of sculpture, painting or decoration which form an integral part of a monument may only be removed from it if this is the sole means of ensuring their preservation.

RESTORATION

Article 9.

The process of restoration is a highly specialized operation. Its aim is to preserve and reveal the aesthetic and historic value of the monument and is based on respect for original material and authentic documents. It must stop at the point where conjecture begins, and in this case moreover any extra work which is indispensable must be distinct from the architectural composition and must bear a contemporary stamp. The restoration in any case must be preceded and followed by an archaeological and historical study of the monument.

Article 10.

Where traditional techniques prove inadequate, the consolidation of a monument can be achieved by the use of any modern technique for conservation and construction, the efficacy of which has been shown by scientific data and proved by experience.











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Article 11.

The valid contributions of all periods to the building of a monument must be respected, since unity of style is not the aim of a restoration. When a building includes the superimposed work of different periods, the revealing of the underlying state can only be justified in exceptional circumstances and when what is removed is of little interest and the material which is brought to light is of great historical, archaeological or aesthetic value, and its state of preservation good enough to justify the action. Evaluation of the importance of the elements involved and the decision as to what may be destroyed cannot rest solely on the individual in charge of the work.



Replacements of missing parts must integrate harmoniously with the whole, but at the same time must be distinguishable from the original so that restoration does not falsify the artistic or historic evidence.

Article 13.

Additions cannot be allowed except in so far as they do not detract from the interesting parts of the building, its traditional setting, the balance of its composition and its relation with its surroundings.

HISTORIC SITES

Article 14.

The sites of monuments must be the object of special care in order to safeguard their integrity and ensure that they are cleared and presented in a seemly manner. The work of conservation and restoration carried out in such places should be inspired by the principles set forth in the foregoing articles.













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EXCAVATIONS

Article 15.

Excavations should be carried out in accordance with scientific standards and the recommendation defining international principles to be applied in the case of archaeological excavation adopted by UNESCO in 1956.

Ruins must be maintained and measures necessary for the permanent conservation and protection of architectural features and of objects discovered must be taken. Furthermore, every means must be taken to facilitate the understanding of the monument and to reveal it without ever distorting its meaning.

All reconstruction work should however be ruled out "a priori". Only anastylosis, that is to say, the reassembling of existing but dismembered parts can be permitted. The material used for integration should always be recognizable and its use should be the least that will ensure the conservation of a monument and the reinstatement of its form.

PUBLICATION

Article 16.

In all works of preservation, restoration or excavation, there should always be precise documentation in the form of analytical and critical reports, illustrated with drawings and photographs. 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 included. This record should be placed in the archives of a public institution and made available to research workers. It is recommended that the report should be published.





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Italian Restoration Chart of 1972

Memorandum nº 117 April 6, 1972, MINISTRY OF EDUCATION

The Ministry of Education, with the advice of the High Council of the Antiquities, in the attempt to reach uniform criteria for the management of Antiquities and Fine Arts, herewith issues new guidelines for the conservation of artistic Heritage.

Such regulations take the name of "The Restoration Chart 1972", are preceded by a short general report and followed by four addenda containing guidelines for specific applications:

Addendum A "the preservation and the restoration of antiquities"

Addendum B "the execution of architectural restorations"

Addendum C "the execution of restorations on painting and sculpture"

Addendum D "the protection of historical urban areas"

The documents included in the addenda are all integral parts to the chart.

Preamble to the Restoration Chart

The awareness that "art works," in their broadest definition, ranging from the urban fabric and architectural monuments to painting, sculpture, archaeological finds and figurative expressions of the popular cultures, must be protected in an organic and equal level, has led to the elaboration of these technical-legal guidelines. These define the boundaries of the process understood as "conservation," both in the process of preservation and in the process of actual restoration of the objects.







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It constitutes a point of pride for Italian culture that, as early as 1931, at the end of a period of restoration practice characterized by arbitrary reconstructive restorations, a document called the Restoration Chart was created. Though its reach was originally limited to architectural monuments, it was easy to expand its scope to become a guideline for every restoration, including pictorial and sculptural artwork.

Unfortunately, the "Restoration Chart" never had the weight of a law. Later, a greater awareness to the dangers of exposing art to restoration done without precise technical criteria lead in 1938 to the creation the Instituto Centrale per il Restauro and of a ministerial commission with the task of elaborating unified guidelines that would embrace all the branches of figurative arts and archaeology. Though these guidelines were golden, again they did not attain the status of law, but remained merely internal guidelines for the government administration. Neither the theories nor the methodologies developed at the Instituto Centrale per il Restauro were implemented on all of the nation's art work restorations.

The failure to give legal status of such regulation did not take long to reveal its shortcomings. It was ineffectual in front of the arbitrary restoration practices of the past (in particular of demolitions and alterations of archaeological areas). It was also ineffectual when the understandable but no less blameworthy postwar emotion led to heavy-handed restoration and reconstruction of monuments damaged or destroyed during the war. These where often done without the caution and deliberation that had been the virtue of Italian restoration practices.

No less damage was caused by the demands of a misunderstood modernity and a crude urban planning process, which in order to enlarge cities and allowing traffic to flow smoothly, failed to respect a

holistic view of the urban fabric. An important feature of the Restoration Chart is its definition of historic districts beyond the narrow boundaries of the single monument.

Regarding the more circumscribed and manageable field of pictorial and sculptural restoration, despite the lack of legal status the guidelines fostered, a greater caution is therefore concluded, thus avoiding serious damages by practices such as aggressive cleanings, as they have unfortunately been practiced in some foreign countries. The necessity for standardized restoration methods became even more obvious when dealing with privately owned artwork, although no less valuable than the cultural heritage owned by public institutions, was handled with less consistent practices.













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Restoration Chart of 1972

- Art. 1, All the works of art of every age, in the widest meaning of the word, ranging from: architectural monuments to painting and sculpture (even if in fragments), to Paleolithic artifacts, figurative expressions of the popular cultures, and to contemporary art, whether owned by individual persons or institutions, in matter of preservation and restoration--all will be subject to the present guidelines taking the name of "Restoration Chart of 1972."
- **Art. 2**, In addition to items listed in Art. 1, the present guidelines will apply to the following categories of objects to assure their preservation and restoration: building complexes of monumental, historical, or environmental interest, in particular historical urban areas; art collections; historic furnishings and interior decors preserved in their traditional arrangement; gardens and parks of particular importance.
- **Art. 3**, In addition to items listed in Art. 1 and 2, the present guidelines will also apply to the following items to assure their preservation and the restoration: ancient ruins and archaeological finds whether found on land or underwater.
- Art. 4, It is meant by "preservation" any conservative provision that does not involve any direct action on the material of the artwork. It is meant by "restoration" any action on the material of artwork in order to maintain its material integrity and facilitate the reading and the transmission to the future in their entirety. This applies to artworks and other objects defined in the previous articles.
- Art. 5, All overseeing government agencies and responsible Institutions in the matter of conservation of the historical-artistic and cultural heritage must prepare a yearly program listing all work of preservation, restoration, underground or under water archaeology, to be done on behalf of the State, other institutions or private individuals. It must be presented to and approved by the Ministry of Education with the approval by High Council of the Antiquities and Fine Arts. As part of this program, any restoration works done to items defined by Article 1 will be described and justified in a technical report and proposal which will describe the conservative history, the existing conditions, the planed restoration work and the budget necessary to complete the work. The technical report and proposal must be approved beforehand by the Ministry of Education. In special cases of very important works, or ones where questions have arisen, it must be approved by High Council of the Antiquities and Fine Arts.

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- Art. 6, Regarding the preservation and restoration procedures set by Art. 4 on artwork as defined per Art. 1, 2 and 3 the following actions will be forbidden without exception:
- 1) completions of unfinished work in style, analogical, in simplified form, or even if there are graphic or plastic documentation illustrating the intended form of the completed work;
- 2) removals or demolitions that erase from the artwork traces left by its passage through time, unless these features are of limited scope and incongruous or disfiguring in relation to the historical values of the work or if they are past completions in style that counterfeit the nature of the work;
- 3) removal, reconstruction or transferal to locations other than the original one, unless it is deemed necessary for conservation reasons;
- 4) alteration of the surrounding accessories or environmental conditions in which the artwork has arrived to our time, such as the monumental or environment settings, the furnishings, the gardens, the parks, etc.;
- 5) alteration or removal of patinas.
- **Art. 7, -** To the same ends as of Art. 6 and for all works to which Art. 1, 2, and 3 applies, the following practices are acceptable:
- 1) addition of accessory parts that have a structural function and reintegration* of small historically verified portions. Such interventions must be done in a way that differentiates clearly the original portion of the artwork from the new addition either by clearly marking the outline of the reintegration or by using material that is concordant yet sufficiently different to be clearly distinguishable by the naked eye, in particular at the points of connection between the old and the new. Moreover, where possible, all reintegration should be dated and signed;
- 2) Cleanings of paintings and polychrome sculptures, as long as it does not reach the surface of the color and respects the patina and ancient varnishes and, as with all other types of work, should never reach the raw material that makes up the art;





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3) Anastilosis*, only when carefully documented and by reconstructing missing sections with techniques clearly discernible to the naked eye such as using lighter or neutral materials, setting them at a different level from the original parts, or leaving in sight the original support, however never reconstructing ex novo missing "figurative"* sections and inserting important features that will alter the figurative nature of the work;

4) modifications and new insertions in the inner structure, underlayment's or structural supports with the purpose of conservation and static consolidations, provided that at the completion of the restoration work, there are no chromatic alterations or other changes in the appearance of surface mater;

5) construction of a new setting or relocation of artwork when the original or traditional setting no longer exists, or when the conservation conditions demand the relocation.

Art. 8, - Any work done on the art or to its surroundings as defined in Art. 4 must be executed in such way and with such techniques and materials that will not obstruct or prevent preservation or restoration work in the future. Moreover, every intervention on the artwork must be preceded by a written report that documents the artwork and explains the motivations for the work to be done (last section Art. 5). During the course of the work a journal must be kept and will be followed by a final report. This will contain photographic documentation showing the conditions before, during and after the work was completed. They will include documentation of all scientific tests and research done with the aid of such disciplines as chemistry, physics, microbiology and other sciences. A copy of these reports will be kept in the archives of the competent Soprintendenza* and one will be sent to the Instituto Centrale Per il Restauro. In the case of cleanings, a small sample area at the margins of the work will be kept in the original condition, while in the case of removal of additions, the parts removed will have to be conserved or be documented in a special archives-warehouse of the competent Soprintendenza.

Art. 9, - The use of new procedures and materials for restoration, instead of those currently used or permitted, will have to be authorized by the Ministry of Education, with the explained consensus of Istituto Centrale del Restauro. This institution's role will be to actively advise the same Ministry and to discourage the use of antiquated, damaging or untested materials and procedures, to suggest new ones, or to determine the need of outside resources in terms equipment and specialists not available with in their organizations.









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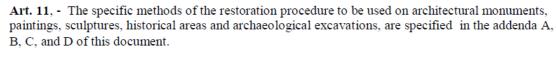


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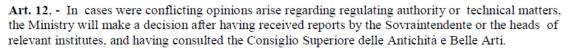


Art. 10, - Measures taken to prevent damage to the artworks (as per Art.1, 2, and 3) from pollution and atmospheric, thermal and hygrometric variations, will be done in a manner not to alter considerably the visual perception of the material surfaces and the colors, nor require substantial and permanent modifications to the environment in which the artworks historically has been transmitted. In cases where modifications of the sort are indispensable for the conservation, they must be made in a manner to avoid any doubt on the time when they were executed and be the least conspicuous.





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 $\mathbf{Addendum}\;\mathbf{A}$ - Instructions for the Preservation and the Restoration of Antiquities







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Addendum B - Instructions for the Execution of Architectural Restorations.

It is to be assumed that work of timely maintenance assures long life to monuments, avoiding the acceleration of damages. It is recommended that greater attention is paid to continuous surveillance of the buildings so conservative measures can be applied before restoration work of larger magnitude becomes necessary. Moreover, it is important to keep all restoration operations under a conservational mode, respecting historical additions and avoiding new additions or reconstructions.

In order to always assure the survival of monuments, it is important to carefully consider the compatibility of the new uses of the old buildings to the historical-artistic nature and content of the monument.

The adaptation work will have to be kept to a minimum, conserving scrupulously the external shapes and avoiding substantial alterations to the building's typology, structure, construction systems and the inner circulation. The architectural restoration plan and design must be preceded by a careful study of the monument that takes into consideration regional context, the urban fabric, building typology, formal quality and visual prominence, structural systems and characters, etc., in relation to the original building as well as to the future additions or modifications.

This study will include research of the following aspects of the building: bibliography, iconography and archival records, etc., in order to acquire every possible historical data. The design project will be based on a complete and accurate set of measured drawings, a photographic survey, a study of the regulating patterns, proportional systems, and will also include a separate, precise study for the structural conditions of the building.

The execution of the restoration of monuments is a very delicate operation of great responsibility which must to be entrusted to specialized contractors. The work should be paid for "on a fixed price basis", instead of an itemized price or "by the piece basis." The restoration work must be continuously and carefully supervised in order to guarantee the good execution and allow quick response in case of unexpected conditions or if structural problems are found. This is also important in order to avoid damage or destruction to elements not documented in the survey that may emerge during demolition work, which are useful to the understanding or the restoration of the building. In particular, the site supervisor must ascertain the existence or not of any traces of decorations before cleaning off or removing paints or plasters, and what were the original textures and colors of the walls and vaults.

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The fundamental requirement of the restoration is to respect and preserve the authenticity of the component elements. This principal must guide and condition the operating choices. For example, in the case of out plumb masonry, even if practical necessities suggest the demolition and the reconstruction, the possibility of straitening the wall without replacing the original masonries must first be considered and tried. The substitution of damaged stones will happen only in the most extreme conditions.

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The substitutions and eventual integrations* of wall decorations, where necessary and always in the most circumscribed manner, will always have to be distinguishable from the original elements, differentiating the new materials or surfaces. But it is generally preferable to operate along the perimeter of the integration with a clear and persistent continuous contour line to define the area, using small strips of metal, a continuous line of tile fragment or by making a visible groove on the surface, whichever is most appropriate in each situation. The consolidation of stones or other materials will require test trials beforehand using proven methods that have been accepted by the Instituto Centrale per il Restauro.

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Every precaution will have to be adopted in order to avoid further deterioration of the existing conditions; therefore all restoration work will have to include measures to eliminate the causes of the damages. For example, if a stone is cracked by rusting iron clips or bolts that expand as they rust, it is desirable to disassemble the offending part to replace the iron with bronze or copper or, even better, with stainless steel that has the advantage of not staining the stones.

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Stone sculptures located outdoors or in public squares must be carefully supervised and, whenever possible, using the above mentioned tested method, consolidated and protected (at times even on a seasonal basis). In cases where it is impossible to preserve the sculptures outdoors they should be transferred indoors. For the good conservation of bronze or stone sculptures in fountains, it is necessary to decalcify the water, eliminating the limestone incrustations and the resulting harmful periodic cleanings that requires.

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The patina of the stones must be conserved for obvious historical, aesthetic and also technical reasons, in as much as it has a general protective function, as is proven by the corrosion that can take place on surfaces where the patina is missing. The matter that accumulates on the stone can be removed: detritus, dust, soot, bird guano, etc. - using only brushes with vegetable bristles or air jets at moderate pressure. Metallic brushes and scrapers must be avoided. Likewise, generally to be excludes are: pressurized jets of steam, water or sand blasting. It is even advisable to avoid any form of washing.

Addendum D - Instructions for the protection of the "Historical Areas".

To determine the location of Historical Areas it is necessary to consider not only the historic urban "centers" but also, in a more generalized manner, all areas of human settlement whose structures (whether unitary, fragmented, partially transformed in time, constituted in the past or more recently) have value as testimony of history or individually for their particular architectural or urban quality.

The historical character must be related to the interest that such settlements offer as evidence of past civilization and of urban culture, independently from their intrinsic artistic or formal qualities or any individual environmental aspects, that can enrich or exalt its value, since not only the architecture but also the urban structure possesses by itself value and meaning.

The restoration in the Historical Urban Areas should aim to guarantee, with ordinary and extraordinary means, the permanence in time of the wealth of elements that make up these urban structures. The restoration should not be limited to operations meant only to conserve the formal characters of single architectural works or single environments, but should include the substantial conservation of all the characteristics of the urban organism and all the elements that define it. To adequately preserve the urban organism in its continuity in time and its role in modern life, it is necessary that the planning process view the Historic Urban Centers in its broadest urban and regional context, so that future developments are compatible with their preservation and recovery.

Through such process (by means of the urban design and management) it will be possible to shape a new city structure in which functions not compatible with the conservation of the historic core will be located in other more compatible areas. Also, it will be necessary to considered the preservation of the broad regional and environmental context; specially where its relation to urban structures has gained historical meaning (for example, the crown of hills around Florence, the Venetian lagoon, the Roman Centuriation of the Po Valley, the Trulli district in Puglia, etc.).

The components that must be considered, through which the preservation of the urban structure is to be implemented, are: building structures, the component external spaces (roads, public squares, etc.), the open spaces belonging to buildings (courtyards, garden, open space, etc.), and other meaningful structures (walls, city gates, cliffs, etc.), and last but not least, natural features that accompany, characterize or accentuate the urban landscape (natural contours, water course, singular geomorphic features, etc.). The component buildings that make up the urban fabric must be preserved not only in its formal architectural aspects but also in their typological aspects since their usage of is an important historical element that has shaped and characterized them over time.





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Every restoration must be preceded by a critical historic analysis, with the objective of assessing all important features from an urban design, architecture, environment, typology, constructive, etc., aspect. The results of this analysis are not meant to set differing standards of operation (because those must be the same throughout the historic core) but to determine the different degrees of conservative action that must be taken on the urban fabric as well as on the individual building.

To this purpose it is necessary to specify that by conservative reorganization it is meant, first of all, conserving of the street and block fabric in a generalized manner (maintenance and conservation of the street mesh, the perimeter of city blocks, etc.), and, moreover, the conservation of the urban characters that involve the integral preservation of the important monumental and natural features that characterize the historic urban environment. Other elements or single buildings can be adapted or transformed to the meet the requirements of modern life, and in exceptional cases even total substitutions can be considered, but only with the condition that it be compatible with the conservation of the general character of the historical area.

The main types of interventions at an urban level are:

- a) Urban Restructuring, by which is meant the restructuring of the relationship between the historic center and regional territory of which it is part. Of particular importance is analyzing the role played by the historical center in relation to the surrounding region both in history and at present times. Special attention should be given to the relation between the existing structure of the historic areas and modern urban development, principally the functional aspect of new commercial districts. The urban restructuring should aim at freeing the historic center of those incompatible activities that create situations of chaos and deterioration.
- b) Road Rearrangement. Road and Traffic patterns in the historic areas must be analyzed and redesigned to eliminate pathological traffic conditions in the historic centers, with the objective of bringing back to these areas activities that are compatibile with the historic structures. It should also be taken in consideration the development of public facilities and services that are specifically fashioned to well serve the needs of life in the historic centers.
- c) Refashion of the Streetscape and Furniture, including streets, public squares and all other existing open spaces (courtyards, spaces inner, gardens, etc.), in order to create of one homogenous connection between buildings and open space.



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The main types of interventions at the building level are:

a) Structural and hygienic renovation of the buildings, tending to the maintenance of the existing structure and a balanced use of it. Such restorations must follow established guidelines for restoration. This type of work requires an approach that respects the typological structural and functional aspects of the building avoiding any transformation that will change its character.

b) Renovations to the interior of the buildings will be allowed only where it is indispensable to the ends of the maintaining the building in use. In this type of work it is fundamental to respect the typological and constructive qualities of the buildings, forbidding all those that alter the character of the building, for example the internal gutting of the structure or the introduction of functions that excessively deform its typological-constructive nature.

The Legal Administrative Instruments used to carry out the above policies will be essentially:

The City General Master Plans, when restructuring the relation between the historical areas with the rest of the city and surrounding territory.

Historic District Renovation Master Plans.

Executive Zone Plans, for blocks or related urban structures.

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Project "SURE - Sustainable Urban Rehabilitation in Europe" implemented in frames of Erasmus+ Programme Key Action 2: Strategic Partnership Projects
Agreement n° 2016-1-PL01-KA203-026232

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Co-funded by the Erasmus+ Programme of the European Union

