



Architectural Design in Historical Context – Design studio



Erasmus+

Theoretical background of architectural heritage preservation (part 2)

The development of the approach to heritage preservation

(brief review of the international charters, guidelines, recommendations of the last century)

what is heritage...

what is the heritage preservation...

how to deal with historic architecture....

the 20th century perspective...

European Charter of the Architectural Heritage (1975), Council of Europe, <https://www.icomos.org/en/charters-and-texts/179-articles-en-francais/ressources/charters-and-standards/170-european-charter-of-the-architectural-heritage>

The Council of Europe declared 1975 the European Architectural Year, leading to the adoption of this Charter, which aims to develop a common European policy for the protection of architectural heritage. The document defines the nature of the European architectural heritage, its importance to the European community, and threats to the heritage from ignorance, neglect, and deterioration as well as economic pressures, motor traffic, inappropriate restoration, and property speculation. The Charter calls for an **integrated conservation approach with the following components:**

- sensitive restoration techniques,
- the effective use of laws and regulations,
- appropriate administrative support, and
- adequate technical and financial support (including tax incentives).

The Charter encourages development of training facilities and fostering of traditional crafts. Cooperation with the public and coordination between European nations is seen as an important element in the conservation of Europe's architectural heritage.

Declaration of Amsterdam (1975), Congress on the European Architectural Heritage, Council of Europe,

<https://www.icomos.org/en/charters-and-texts/179-articles-en-francais/ressources/charters-and-standards/169-the-declaration-of-amsterdam>

The Declaration of Amsterdam emphasizes role of planning, education, legal, and administrative measures in protecting the region's architectural heritage. The document stipulates that **architectural conservation must become an integral part of urban and regional planning.**

It calls for integrated conservation **involving** both local **authorities and citizens** and **taking into consideration social factors.** The Declaration notes the need for new legislative and administrative measures as well as appropriate financial support for conservation. The Declaration notes the importance of promoting methods, techniques, and skills for restoration and rehabilitation.

The need for better training programs is noted; international exchange of knowledge, experience, and trainees is recommended. Authorities should try to promote an interest in conservation among young people as a prospective discipline. The Declaration stresses the importance of educational programs for youth and the public to foster an appreciation of the architectural heritage of Europe.

Appleton Charter for the Protection and Enhancement of the Built Environment (1983),
ICOMOS Canada, <https://www.icomos.org/charters/appleton.pdf>

The Appleton Charter of ICOMOS Canada outlines principles for the **preservation of the built environment** regarding its **protection, value, setting, relocation, enhancement, use, additions, and environmental control.**

The Charter emphasizes management of the urban environment as an important aspect of conservation of cultural heritage.

Levels of intervention (preservation, period restoration, rehabilitation, period reconstruction, redevelopment) and **scales of intervention** (maintenance, stabilization, addition, removal) are described. The charter recommends that interventions consider cultural significance, condition and integrity of the fabric, contextual value, and the appropriate use of available physical, social, and economic resources. It calls for public participation in the decision-making process. The Charter also includes principles of practice, among which is a recommendation regarding patina, which is seen as part of the historical integrity of the built environment.

The Washington Charter: Charter on the Conservation of Historic Towns and Urban Areas (1987), ICOMOS General Assembly, https://www.icomos.org/charters/towns_e.pdf

The Charter seeks to complement the Venice Charter, whose emphasis is on the individual monument. It addresses such issues as:

- integration of preservation objectives into planning policies;
- qualities of historic towns that should be preserved;
- participation of residents in the preservation process; and
- the social and economic aspects of historic town preservation.

Qualities to be preserved include the historic character of the town or urban area and all those material and spiritual elements that express this character, especially:

- a)** Urban patterns as defined by lots and streets;
- b)** 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 town or urban area and its surrounding setting, both natural and man-made; and
- e)** The various functions that the town or urban area has acquired over time.

Any threat to these qualities would compromise the authenticity of the historic town or urban area.

The Washington Charter: Charter on the Conservation of Historic Towns and Urban Areas (1987), ICOMOS General Assembly, https://www.icomos.org/charters/towns_e.pdf

METHODS AND INSTRUMENTS

5. Planning for the conservation of historic towns and urban areas should be preceded by multidisciplinary studies.

Conservation plans must address all relevant factors including archaeology, history, architecture, techniques, sociology and economics.

The principal objectives of the conservation plan should be clearly stated as should the legal, administrative and financial measures necessary to attain them.

The conservation plan should aim at ensuring a harmonious relationship between the historic urban areas and the town as a whole.

The conservation plan should determine which buildings must be preserved, which should be preserved under certain circumstances and which, under quite exceptional circumstances, might be expendable.

Before any intervention, existing conditions in the area should be thoroughly documented. The conservation plan should be supported by the residents of the historic area.

6. Until a conservation plan has been adopted, any necessary conservation activity should be carried out in accordance with the principles and the aims of this Charter and the Venice Charter.

7. Continuing maintenance is crucial to the effective conservation of a historic town or urban area.

8. New functions and activities should be compatible with the character of the historic town or urban area.

Adaptation of these areas to contemporary life requires the careful installation or improvement of public service facilities.

9. The improvement of housing should be one of the basic objectives of conservation. **10.** When it is necessary to construct new buildings or adapt existing ones, the existing

spatial layout should be respected, especially in terms of scale and lot size.

The introduction of contemporary elements in harmony with the surroundings should not be discouraged since such features can contribute to the enrichment of an area.

11. Knowledge of the history of a historic town or urban area should be expanded

through archaeological investigation and appropriate preservation of archaeological findings.

12. Traffic inside a historic town or urban area must be controlled and parking areas must be planned so that they do not damage the historic fabric or its environment.

13. When urban or regional planning provides for the construction of major motorways, they must not penetrate a historic town or urban area, but they should improve access to them.

14. Historic towns should be protected against natural disasters and nuisances such as pollution and vibrations in order to safeguard the heritage and for the security and well-being of the residents.

Whatever the nature of a disaster affecting a historic town or urban area, preventative and repair measures must be adapted to the specific character of the properties concerned.

15. In order to encourage their participation and involvement, a general information programme should be set up for all residents, beginning with children of school age.

16. Specialised training should be provided for all those professions concerned with conservation.

Charter for the Conservation of Places of Cultural Heritage Value (1992),

ICOMOS New Zealand, <http://www.gdrc.org/heritage/icomos-nz.html>

This charter establishes principles to guide owners, authorities, tradespersons and professionals in conserving places of cultural heritage value in New Zealand, where the Treaty of Waitangi recognizes the indigenous Maori and Moriori as exercising responsibility beyond current legal ownership for their treasures, monuments and sacred places.

The charter sets forth general principles and calls for **conservation methods that show the greatest respect for, and involve the least possible loss of, material of cultural heritage value.**

It also outlines conservation processes and provides a list of definitions of conservation terms.

Charter for the Conservation of Places of Cultural Heritage Value (1992),

ICOMOS New Zealand, <http://www.gdrc.org/heritage/icomos-nz.html>

*The **purpose of conservation** is to care for places of cultural heritage value, their structures, materials and cultural meaning. In general, such places:*

- a) have lasting values and can be appreciated in their own right;*
- b) teach us about the past and the culture of those who came before us;*
- c) provide the context for community identity whereby people relate to the land and to those who have gone before;*
- d) provide variety and contrast in the modern world and a measure against which we can compare the achievements of today; and*
- e) provide visible evidence of the continuity between past, present and future.*

Conservation Practice

Appropriate conservation professionals should be involved in all aspects of conservation work. Indigenous methodologies should be applied as appropriate and may vary from place to place. Conservation results should be in keeping with their cultural content. All necessary consents and permits should be obtained. Conservation projects should include the following:

- a) definition of the cultural heritage value of the place, which requires prior researching of any documentary and oral history, a detailed examination of the place, and the recording of its physical condition;*
- b) community consultation, continuing throughout a project as appropriate;*
- c) preparation of a plan which meets the conservation principles of this charter;*
- d) the implementation of any planned work; and*
- e) the documentation of any research, recording and conservation work, as it proceeds.*

Conservation Method

Conservation should:

- a) make use of all relevant conservation values, knowledge, disciplines, arts and crafts;*
- b) show the greatest respect for, and involve the least possible loss of, material of cultural heritage value;*
- c) involve the least degree of intervention consistent with long term care and the principles of this charter;*
- d) take into account the needs, abilities and resources of the particular communities; and*
- e) be fully documented and recorded.*

The Nara Document on Authenticity (1994), ICOMOS Symposia, <https://www.icomos.org/charters/nara-e.pdf>

In recent years, **authenticity** has become a **central concern in the conservation of cultural heritage**.

The Nara Document builds on the Venice Charter in light of an expanding scope of cultural heritage concerns. It addresses the need for a broader understanding of cultural diversity and cultural heritage as it relates to the conservation. The document underscores the importance of considering the cultural and social values of all societies. It emphasizes respect for other cultures, other values, and the tangible and intangible expressions that form part of the heritage of every culture.

There are **no fixed criteria to judge value and authenticity of cultural property**; rather it must be **evaluated within the cultural context** to which it belongs. Though responsibility for the care and management of heritage belongs primarily to the culture that produced it, the document calls for adherence to the principles and responsibilities imposed by international charters.

the keynotes of the Nara document are:

CULTURAL DIVERSITY, HERITAGE DIVERSITY, VALUES, AUTHENTICITY

Definitions

Conservation: all efforts designed to understand cultural heritage, know its history and meaning, ensure its material safeguard and, as required, its presentation, restoration and enhancement. (Cultural heritage is understood to include monuments, groups of buildings and sites of cultural value as defined in article one of the World Heritage Convention).

Information sources: all material, written, oral and figurative sources which make it possible to know the nature, specifications, meaning and history of the cultural heritage.

Declaration of San Antonio (1996), ICOMOS Symposia, <https://www.icomos.org/en/charters-and-texts/179-articles-en-francais/ressources/charters-and-standards/188-the-declaration-of-san-antonio>

The Declaration of San Antonio was the result of a symposium held in Texas in 1996 on the subject of authenticity in the conservation and management of the cultural heritage of the Americas. The document is a regional response to a larger international **debate on the nature of authenticity and conservation**.

The San Antonio Declaration sees a direct **connection between authenticity and identity**: cultural identity is the foundation of the cultural heritage of the Americas and its conservation. Understanding of the history, significance, and values associated with a site is important to identifying authenticity. The Declaration considers only the original, historic fabric to be authentic. Thus it is important to understand the social value of the site not just the significance of the physical fabric. The Declaration makes a distinction between **dynamic sites**, where material changes may be acceptable as part of an ongoing evolution of the site, and **static sites**, where the physical fabric is felt to require the highest level of conservation and alterations should be minimized. The Declaration contains a number of recommendations concerning architecture and urbanism, archaeological sites, and cultural landscapes.

the keynotes of the San Antonio declaration are:

AUTHENTICITY AND IDENTITY, AUTHENTICITY AND HISTORY, AUTHENTICITY AND MATERIALS, AUTHENTICITY AND SOCIAL VALUE, AUTHENTICITY IN DYNAMIC AND STATIC SITES, AUTHENTICITY AND STEWARDSHIP, AUTHENTICITY AND ECONOMICS,

***Indicators of authenticity:** reflection of the true value; Integrity; context; identity; use and function.*

International Wood Committee Charter: Principles for the Preservation of Historic Timber Buildings (1999), ICOMOS, https://www.icomos.org/charters/wood_e.pdf

This document defines basic principles and practices for the protection and preservation of historic timber structures. It calls attention to the diversity and scarcity of historic timber structures and their vulnerability to material decay and degradation, and makes recommendations in seven areas:

- inspection, recording, and documentation of materials, skills, and technologies should be performed;
- monitoring and maintenance should be conducted on a regular basis;
- interventions should follow traditional means, be reversible or not impede future preservation, and not hinder future access to evidence in the structure or site;
- repair and replacement materials, craftsmanship and construction technology should, where possible, correspond with those used originally;
- historic forest reserves should be established as source of appropriate timber for preservation and repair of historic structures;
- contemporary materials and technologies should be used with the greatest caution and only where there is assured benefit;
- education and training are essential to a sustainable preservation and development policy.

Framework Convention on the Value of Cultural Heritage for Society

Council of Europe, 2005 10 27, Faro, <https://rm.coe.int/1680083746>

The main aims of the convention are:

- to recognise individual and collective responsibility towards cultural heritage;
- to emphasise that the human development and quality of life could be achieved through the conservation of cultural heritage and its sustainable use;

cultural heritage is a group of resources inherited from the past which people identify, independently of ownership, as a reflection and expression of their constantly evolving values, beliefs, knowledge and traditions. It includes all aspects of the environment resulting from the interaction between people and places through time;

VIENNA MEMORANDUM on
“World Heritage and Contemporary Architecture – Managing the Historic Urban Landscape”,
2005, UNESCO and World heritage centre,

<https://whc.unesco.org/archive/2005/whc05-15ga-inf7e.pdf>

The *Vienna Memorandum* focuses on the **impact of contemporary development on the overall urban landscape of heritage significance**, whereby the notion of historic urban landscape goes beyond traditional terms of “historic centres”, “ensembles” or “surroundings”, often used in charters and protection laws, to include the broader territorial and landscape context.

Definition

The historic urban landscape, building on the 1976 “UNESCO Recommendation concerning the Safeguarding and Contemporary Role of Historic Areas”, refers to ensembles of any group of buildings, structures and open spaces, in their natural and ecological context, including archaeological and palaeontological sites, constituting human settlements in an urban environment over a relevant period of time, the cohesion and value of which are recognized from the archaeological, architectural, prehistoric, historic, scientific, aesthetic, socio-cultural or ecological point of view. This landscape has shaped modern society and has great value for our understanding of how we live today.

Aims and principles:

Continuous changes in functional use, social structure, political context and economic development that manifest themselves in the form of structural interventions in the inherited historic urban landscape may be acknowledged as part of the city's tradition, (...)

The central challenge of contemporary architecture in the historic urban landscape is to respond to development dynamics (...)

A central concern of physical and functional interventions is to enhance quality of life and production efficiency by improving living, working and recreational conditions and adapting uses without compromising existing values derived from the character and significance of the historic urban fabric and form. This means not only improving technical standards, but also a rehabilitation and contemporary development of the historic environment based upon a proper inventory and assessment of its values, as well as adding high-quality cultural expressions.

Taking into account the basic definition (according to Article 7 of this Memorandum), urban planning, contemporary architecture and preservation of the historic urban landscape should avoid all forms of pseudo-historical design, as they constitute a denial of both the historical and the contemporary alike. One historical view should not supplant others, as history must remain readable, while continuity of culture through quality interventions is the ultimate goal.

Charter on the Interpretation and Presentation of Cultural Heritage Sites (2008), ICOMOS, https://www.icomos.org/charters/interpretation_e.pdf

Building on the Venice Charter, this charter seeks to establish guidelines for the interpretation of cultural heritage sites. It emphasizes the **role of public communication and education in heritage preservation**.

The Charter identifies heritage sites and the **intangible elements** associated with the site as a **resource for learning from the past**.

Therefore, interpretive programs must distinguish and recognize the **phases in the site's evolution** in order to respect their authenticity. The Charter also emphasizes the **inclusion of all stakeholders in the interpretation of a site** and acknowledges that in some circumstances, a community may opt to not have a site publicly interpreted.

Charter on the Interpretation and Presentation of Cultural Heritage Sites (2008), ICOMOS, https://www.icomos.org/charters/interpretation_e.pdf

DEFINITIONS

Interpretation refers to the full range of potential activities intended to heighten public awareness and enhance understanding of cultural heritage site. These can include print and electronic publications, public lectures, on-site and directly related off-site installations, educational programmes, community activities, and ongoing research, training, and evaluation of the interpretation process itself.

Presentation more specifically denotes the carefully planned communication of interpretive content through the arrangement of interpretive information, physical access, and interpretive infrastructure at a cultural heritage site. It can be conveyed through a variety of technical means, including, yet not requiring, such elements as informational panels, museum-type displays, formalized walking tours, lectures and guided tours, and multimedia applications and websites.

Interpretive infrastructure refers to physical installations, facilities, and areas at, or connected with a cultural heritage site that may be specifically utilised for the purposes of interpretation and presentation including those supporting interpretation via new and existing technologies.

Site interpreters refers to staff or volunteers at a cultural heritage site who are permanently or temporarily engaged in the public communication of information relating to the values and significance of the site.

Cultural Heritage Site refers to a place, locality, natural landscape, settlement area, architectural complex, archaeological site, or standing structure that is recognized and often legally protected as a place of historical and cultural significance.

In recognizing that **interpretation and presentation are part of the overall process of cultural heritage conservation and management**, this Charter seeks to establish **seven cardinal principles**, upon which Interpretation and Presentation—in whatever form or medium is deemed appropriate in specific circumstances—should be based.

Principle 1: Access and Understanding

Principle 2: Information Sources

Principle 3: Attention to Setting and Context

Principle 4: Preservation of Authenticity

Principle 5: Planning for Sustainability

Principle 6: Concern for Inclusiveness

Principle 7: Importance of Research, Training, and Evaluation

in summary

- The **evolution** of Cultural Heritage Policy Documents during the last century highlighted the change of the heritage object from the monument (art work) of exceptional value to a wide-ranging heritage object, including complexes, cities, sites, and cultural landscapes.
- The **concept** of the heritage object have expanded including objects of various types, values and significance. Heritage now has become a complex and inclusive, covering tangible and intangible things.
- Expert **identification and assessment** of heritage is increasingly giving way to public engagement strategies and participatory initiatives.
- Heritage protection, as an exclusive and specialized **activity**, has become a phenomenon that increasingly encompasses and intervenes in various areas of life and appears to be "everywhere".
- The **treatment of heritage** has also changed: from conservation of the separate object to the concern of the physical context of the object; from the priority of form, visual image and stylistic unity to authenticity, values, context, integrity, identity, use, sustainability and continuity

Cultural Heritage Policy International Documents (list by evolution)

Recommendations of the Madrid Conference (1904), http://www.getty.edu/conservation/publications_resources/research_resources/charters/charter01.html

Carta Di Atene (1931), The Athens Charter for the Restoration of Historic Monuments - 1931. Advisory **Council for Antiquities and Fine Arts**, <https://www.icomos.org/en/167-the-athens-charter-for-the-restoration-of-historic-monuments>

Charter of Athens (1933),

IV International Congress for Modern Architecture, <https://modernistarchitecture.wordpress.com/2010/11/03/ciam's-“the-athens-charter”-1933/>

The Venice Charter: International Charter for the Conservation and Restoration of Monuments and Sites (1964)

International Council on Monuments and Sites (ICOMOS), Second International Congress of Architects and Technicians of Historic Buildings

[https://www.google.it/url?](https://www.google.it/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&cad=rja&uact=8&ved=2ahUKewiVIKPr3M7fAhWIXSwKHfhzAboQFjAAegQIAxAC&url=https%3A%2F%2Fwww.icomos.org%2Fcharters%2Fvenice_e.pdf&usg=AOvVaw3xNT2dkhl89dvJYKp9sVHQ)

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Norms of Quito: Final Report of the Meeting on the Preservation and Utilization of Monuments and Sites of Artistic and Historical Value (1967)

ICOMOS, <https://www.icomos.org/en/charters-and-texts/179-articles-en-francais/ressources/charters-and-standards/168-the-norms-of-quito>

Convention Concerning the Protection of the World Cultural and Natural Heritage (1972)

UNESCO, <https://whc.unesco.org/en/conventiontext/> <http://whc.unesco.org/uploads/activities/documents/activity-562-4.pdf>

Recommendation Concerning the Protection, at National Level, of the Cultural and Natural Heritage (1972), **UNESCO**, http://portal.unesco.org/en/ev.php-URL_ID=13087&URL_DO=DO_TOPIC&URL_SECTION=201.html

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