

# **European Quality Principles for Cultural Heritage Interventions**

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## Executive Summary

This document stems from the works of an expert group<sup>1</sup> assembled by the International Council on Monuments and Sites (ICOMOS), under the mandate of the European Commission and in the framework of the Flagship Initiative of the European Year of Cultural Heritage 2018, “*Cherishing heritage: developing quality standards for EU-funded projects that have the potential to impact on cultural heritage*”.

The main objective of the document is to provide guidance on quality principles for all stakeholders directly or indirectly engaged in EU-funded heritage conservation and management (i.e, European institutions, managing authorities<sup>2</sup>, civil society and local communities, private sector, and experts).

The Introduction outlines the environmental, cultural, social and economic benefits resulting from the application of appropriate conservation measures. Engagement with a wide range of sectoral interests was included in the project research methodology structure.

The document focuses on the core issue of quality in interventions on cultural heritage, and provides a summary of key concepts, international charters, European conventions and standards and changes in understanding and practise of heritage conservation.

The adoption of quality measures is proposed by raising awareness of conservation principles and standards at all the stages, from conception to completion, of a project.

The document recognises the need to develop capacity throughout the wide range of stakeholders involved. Principal areas noted related to governance, risk assessment, research, education and training. Key research outcomes and recommendations are presented with each topic.

## 1. INTRODUCTION

Cultural heritage is a resource for society, retaining and transmitting the many and diverse values of Europe’s culture to the future. Cultural heritage has value in its own right: an inheritance or legacy that is not only material, since it embeds ideals, principles and values that constitute a shared source of remembrance, understanding, identity, dialogue, cohesion and creativity for Europe. Cultural heritage matters for Europeans: more than 80 percent feel that it is important to them personally, to their local community, to their region and to their country. Almost three quarters of them think public authorities should allocate more resources to Europe’s cultural heritage<sup>3</sup>, and a large number think that national authorities, the EU and local and regional authorities<sup>4</sup> should do more to protect Europe’s cultural heritage.

The European Union supports cultural heritage conservation<sup>5</sup>. Its programmes and actions are aimed at ensuring balanced development while respecting the variety and uniqueness of national

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<sup>2</sup> According to the European Commission "A managing authority may be a national ministry, a regional authority, a local council, or another public or private body that has been nominated and approved by a Member State" [http://ec.europa.eu/regional\\_policy/en/policy/what/glossary/m/managing-authority](http://ec.europa.eu/regional_policy/en/policy/what/glossary/m/managing-authority)

<sup>3</sup> Special Eurobarometer 466 on Europeans and cultural heritage [https://europa.eu/cultural-heritage/toolkits/special-eurobarometer-europeans-and-cultural-heritage\\_en](https://europa.eu/cultural-heritage/toolkits/special-eurobarometer-europeans-and-cultural-heritage_en)

<sup>4</sup> National authorities (46%), the EU (40%), local and regional authorities (39%).

<sup>5</sup> Article 3(3) of the Treaty on the European Union (TEU), states that the Union is to respect its rich cultural and linguistic diversity, and ensure that Europe’s cultural heritage is safeguarded and enhanced. Article 167 of the Treaty on the Functioning of the European Union (TFEU) gives the Union the task of contributing to the flowering of

and regional cultures. The cultural heritage sector receives assistance from many EU policies and actions beyond the cultural ones, such as those related to regional development, social cohesion, agriculture, urban, maritime affairs, environment, tourism, education, disaster risk management, the digital agenda, research and innovation<sup>6</sup>.

The European Year of Cultural Heritage 2018 has offered the opportunity to show case many examples of successful EU-funded interventions on cultural heritage. In the current European Regional Development Fund (ERDF) programmes, around EUR 6 billion is allocated for investments in the development and promotion of culture, cultural heritage and creative industries. Interventions range from the recovery of abandoned villages<sup>7</sup> to the rehabilitation of historic towns, to improved accessibility for the disabled to heritage sites. The EU Interreg programme supports crossborder, interregional and cooperation projects that focus on cultural heritage. Investments on cultural heritage are among the most popular topics within the European Territorial Cooperation Projects<sup>8</sup>.

A recent analysis<sup>9</sup> at the European level provides evidence of the benefits of investments in cultural heritage in a wide range of policy areas, contributing to employment, identity, regional attractiveness, creativity and innovation, tourism, quality of life, education and lifelong learning, and social cohesion. It also underlined the need to adopt a holistic and integrated approach to policy making with regard to cultural heritage, integrating the care, protection, and proper use of heritage in all policies, programmes and actions, and in so doing bringing benefits across the four areas of sustainable development: economy, culture, society and the environment.

Investments in infrastructure, rural and urban development, and the mining and energy sector can endanger cultural heritage if adequate impact assessment and mitigation are not undertaken. In attempting to give heritage a new life, issues of authenticity and reconstruction may not be adequately addressed, thereby wiping away centuries of history and cultural values. Excessive tourism pressure, poorly managed tourism and tourism-related development can threaten the physical nature, integrity and significant characteristics of a heritage site. Finding an equilibrium between safeguarding and conservation on the one hand, and dynamic approaches to (re)use and management on the other, is therefore fundamental to ensuring the viability of this non-renewable resource for Europe's economy, culture, society and environment.

The European Parliament, in its Resolution of September 2015, urged the Commission "to include in the guidelines governing the next generation of structural funds for cultural heritage a compulsory quality control system, to apply throughout a project's life-cycle"<sup>10</sup>. And the Council of the EU has invited the Commission, "when planning, implementing and evaluating EU policies, to continue to take into consideration their direct and indirect impact on the enhancement, conservation and safeguarding of Europe's cultural heritage and in particular the need for quality guidelines to ensure that EU investment does not damage or diminish the values of cultural heritage".

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the cultures of the Member States, while respecting their national and regional diversity and at the same time bringing the common cultural heritage to the fore. Union action is to be aimed at encouraging cooperation between Member States and, if necessary, supporting and supplementing their action in the areas of, inter alia, the improvement of the knowledge and dissemination of the culture and history of the European peoples, and the conservation and safeguarding of cultural heritage of European significance.

<sup>6</sup> European Commission, Mapping of Cultural Heritage Actions in European Union policies, Programmes and Activities, August 2017 [https://ec.europa.eu/culture/news/20170705-updated-heritage-mapping-published\\_en](https://ec.europa.eu/culture/news/20170705-updated-heritage-mapping-published_en)

<sup>7</sup> [http://ec.europa.eu/regional\\_policy/en/region-stars-awards/#4](http://ec.europa.eu/regional_policy/en/region-stars-awards/#4)

<sup>8</sup> Connecting Cultures, Connected Citizens <http://www.interact-eu.net/library/e-book-connecting-cultures-connected-citizens/pageflip>

<sup>9</sup> Cultural Heritage Counts for Europe <http://blogs.encatc.org/culturalheritagecountsforeurope/outcomes/>

<sup>10</sup> <http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+TA+P8-TA-20150293+0+DOC+XML+V0//EN>

This document stems from the work of an expert group set up by ICOMOS, under the mandate of the European Commission (EC) and in the framework of the European Flagship Initiative ‘*Cherishing Heritage*’, which was launched on the occasion of the European Year of Cultural Heritage 2018. It takes into account discussions from the workshop held with experts and decision makers in Paris, in May 2018, when examples were presented that point out success factors and bottlenecks in interventions on cultural heritage. This document provides a basis for discussion at the conference “*Cherishing Heritage*”, to be convened in Venice on November 2018<sup>11</sup> to launch the public debate on this issue. This introduction is followed in Section 2 with an overview of key concepts, principles, and approaches and summary of existing standards related to quality in conservation, restoration, (re)use and enhancement of cultural heritage. Section 3 looks at how quality principles for interventions on cultural heritage can be implemented in EU-funded projects from entry to completion (also referred to as the project cycle). Section 4 identifies external factors that can have an impact on quality, namely governance, risk assessment, research, education and training.

The final document, to be issued after the Venice conference, will provide guidance on quality principles for all stakeholders directly or indirectly engaged in EU-funded heritage conservation and management (i.e., European institutions, managing authorities<sup>12</sup>, civil society and local communities, private sector, and experts).

In line with UNESCO and ICOMOS usage, conservation is used as the umbrella term to cover the range of preservation, restoration, and conservation activities.

## **2. QUALITY CONCERNS IN CULTURAL HERITAGE INTERVENTIONS**

This section provides a summary of key concepts, European conventions and charters, and changes in understanding and practice of heritage conservation.

### **2.1. Overview: definitions and observations**

Defining ‘quality’<sup>13</sup> in interventions on cultural heritage is a crucial and challenging issue.

Commitment to quality has a long history, dating at least to the late 19<sup>th</sup> century when great attention was paid to quality issues in the conservation of historic monuments and archaeological sites. More than a century later, defining quality in the context of interventions on cultural heritage has progressed beyond purely technical matters at the level of single buildings to broader cultural, social and economic considerations for sites and their setting.

Quality does not only rely on the intervention itself, but also on the prerequisites set and on the transparency of the procedures. It also depends on the completeness, deepness, detail and rigour of the information and of the technical elaborates and economic figures of any proposal of intervention, as well as on the constant monitoring of the decision making processes.

The processes underpinning quality interventions are equally critical. Typically these include the preparation of a preliminary – and then comprehensive - analysis and diagnosis of the heritage asset and its context. This feasibility study would define: project objectives; threats to its condition

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<sup>11</sup> Cherishing heritage - Quality principles for intervention on cultural heritage. Thursday 22 November – Friday 23 November 2018 Auditorium Santa Margherita, Dorsoduro 3689 - 30123 Venice (IT)

<sup>12</sup> According to the European Commission "A managing authority may be a national ministry, a regional authority, a local council, or another public or private body that has been nominated and approved by a Member State" [http://ec.europa.eu/regional\\_policy/en/policy/what/glossary/m/managing-authority](http://ec.europa.eu/regional_policy/en/policy/what/glossary/m/managing-authority)

<sup>13</sup> Quality is defined as “the degree of excellence of something, often a high degree of it.” “Quality often refers to how good or how bad something is.” Quality refers to “of a high standard” (Cambridge Dictionary).

and processes of decay; its sensitivity to change without loss of values; financial and economic feasibility; a plan for community consultation; interpretation and presentation of its significance; formulation of the business case for the intervention; and principles for sustainability, and legal and regulatory guidance. It would be followed by detailed design of the intervention, selection of the skills required, risk assessment, setting up a management plan, and a monitoring and evaluation framework. The transparency of the selection, monitoring and evaluation procedures are also quality factors.

Among the important documents aimed at setting international principles is the Venice Charter for the Conservation and Restoration of Monuments and Sites of 1964. It established mainly for experts key concepts and approaches for the conservation and restoration of cultural heritage, for example definition of monuments authenticity, originality, cultural significance and use.

Subsequent charters and documents have added, detailed, and differentiated aspects of quality principles. Some concepts that lead to quality principles are related to human rights, for example cultural diversity or the right to access, participate in, enjoy and contribute to cultural heritage. Others such as the rights of future generations, the right of access to information, the principles of prevention and precaution and the polluter pays rule are shared with the environment sector.

Contemporary thinking on quality in cultural heritage interventions recognises that:

- Stakeholders (citizens, the public sector, the voluntary sector, the private sector, politicians, heritage professionals) have points of view on quality.
- Quality is a subjective and relative concept which may depend on the perspective of individuals, the community, the local or wider context, historical and geographic location, the cultural asset, and the aims of the planned intervention.
- Dialogue among stakeholders about proposed interventions on cultural heritage and the meaning of quality is crucial to achieve high standards.

Putting communities at the heart of heritage policies, as advocated by the Faro Convention on the Value of Cultural Heritage for Society of 2005<sup>14</sup>, requires integrated and participatory approaches to safeguarding and managing cultural heritage. Doing so raises the threshold of ambition of quality in planning and implementing interventions on cultural heritage.

Quality in cultural heritage therefore is more than a technical issue; can be seen as multi-dimensional, bearing social, cultural, environmental, and economic values. Notions of cultural diversity, inclusivity, and an understanding of intangible heritage contribute important perspectives in defining future actions and interventions.

## **2.2. Principles and standards**

A set of basic principles related to quality are generally accepted at international level within the heritage sector. They are briefly recalled in the following section (and in Annex 1) so as to establish a common ground for discussion.

### **Common values underpin common principles**

Early discussions concerning the basic principles for cultural heritage conservation and treatment were rooted in an awareness that mankind shares common values which are considered as 'common heritage,' that our historic environment mirrors the history and traditions of peoples, and that transmitting cultural heritage to future generations is a shared responsibility. After World War II, these common values and concepts were enshrined in the conventions and founding treaties of the United Nations, UNESCO, the Council of Europe, and the institutional precursors of today's

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<sup>14</sup> Council of Europe Framework Convention on the Value of Cultural Heritage for Society - Council of Europe Treaty Series - No. 199 <https://www.coe.int/en/web/conventions/full-list/-/conventions/rms/0900001680083746>

European Union. Prior to this, in 1931, the *Athens Conclusions* laid out common principles for cultural heritage conservation.

### **The EU Treaties**

The EU aims at a high level of protection and improvement of the quality of the environment; it respects cultural diversity and ensures the cultural heritage of Europe is safeguarded and enhanced<sup>15</sup>. The EU embraces the concepts of sustainable development<sup>16</sup>, the heritage of mankind, the rights of future generations, and shared responsibility<sup>17</sup>. These concepts provide the framework for this paper.

Because cultural heritage is an area of competence of the Member States, the EU can only supplement their actions. Hence the need to reflect on the principles that should underlay interventions worthy of European funding. The Treaties offer some guidance: within the objectives of respect for cultural diversity and the safeguarding and enhancement of Europe's cultural heritage, the principles of subsidiarity, proportionality<sup>18</sup> as well as mainstreaming<sup>19</sup> apply. The concept of sustainable development envisages the historic environment as a major resource and inspiration for development. The principles that action shall be based on a precautionary approach, that preventive action should be taken, and that environmental damage should as a priority be mitigated at the source<sup>20</sup> are equally relevant for the environment and for cultural heritage.

### **The Council of Europe**

The Council of Europe has contributed to thinking on the historic environment and the practice of cultural heritage conservation in Europe and beyond with four cultural heritage conventions<sup>21</sup> and more than thirty resolutions and recommendations. The *European Charter of the Architectural Heritage*<sup>22</sup> adopted in 1975 with its call for integrated territorial planning and respect for the social dimension of cultural heritage interventions in towns and villages, remains a basic reference document. In January 2018, the *Davos Declaration Towards a High-Quality 'Baukultur'* was adopted within the framework of the European Cultural Convention. It underscores the continuity between cultural heritage and contemporary creation and calls for a high-quality and new approaches to shaping our built environment.

### **ICOMOS Principles for cultural heritage conservation**

ICOMOS doctrinal texts, resolutions, declarations and Ethical Principles have been developed by teams of cultural heritage experts from all regions of the world. They seek to take into account regional and local cultures, traditions and changing contexts. Addressed at cultural heritage professionals, they are non-binding for countries.

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<sup>15</sup> Article 3 of the Treaty on European Union

<sup>16</sup> Article 3 of the Treaty on the European Union

<sup>17</sup> Article 5 of the Treaty on the European Union; Protocol No 2 to the Treaty on the European Union

<sup>18</sup> Article 5 of the Treaty on the European Union; Protocol No 2 to the Treaty on the European Union

<sup>19</sup> Article 167 of the Treaty on the functioning of the European Union

<sup>20</sup> Article 191 of the Treaty on the functioning of the European Union

<sup>21</sup> The Convention for the Protection of the Architectural Heritage of Europe (Granada, 1985). The European Convention on the Protection of the Archaeological Heritage (revised) (Valletta, 1992); The European Landscape Convention (Florence, 2000); The Council of Europe Framework Convention on the Value of Cultural Heritage for Society (Faro, 2005).

<sup>22</sup> The European Charter of Architectural Heritage was adopted on 29 September 1975 by the Committee of Ministers of the Council of Europe and proclaimed at the Congress of the European Architectural Heritage (Amsterdam, 21-25 October 1975). The Amsterdam Declaration was adopted by the participants at the Congress.

#### Summary of ICOMOS ethical and technical guidance on the subject of quality:

- Understanding of and respect for cultural heritage and its significance: it is paramount that uses of - and interventions on - cultural heritage respect and keep the character of the place and its values.
- Adequacy of feasibility studies and detailed conservation plans: analysis and diagnosis of the cultural asset are requisite for any intervention.
- Precaution in designing: “be prudent, especially if knowledge/information is insufficient or unaffordable”.
- Authenticity and integrity: essential.
- Reversibility of the interventions: recommended.
- Efficacy: the desired results have to be formulated and agreed upon in advance
- Preventive care: “it is always better than subsequent traumatic interventions”.
- Minimum intervention: “do as much as necessary and as little as possible”.
- Compatibility of design solutions: “use adequate materials, techniques and detailing” in regard to material and physical-chemical-mechanical interactions between the new and the existing.
- Multidisciplinarity: “call upon skill and experience” from a range of relevant disciplines
- Use of the cultural asset and regular programmed maintenance: necessary to extend life of the cultural asset.

#### **European Committee for Standardization (CEN) standards**

Under the auspices of the European Committee for Standardization (CEN), cultural heritage experts from many European countries are developing standards for the conservation of moveable and immovable cultural heritage. Their objective is to codify a common scientific approach to problems encountered in cultural heritage conservation and to harmonise methodologies and procedure. CEN standards are not well known in the heritage sector, in part because they are accessible only on a paid basis (see Annex 1, References for a preliminary list of relevant CEN standards).

#### **Recommendations**

- Standard setting texts and guidance documents related to cultural heritage by the Council of Europe, ICOMOS, CEN and other professional organizations should be made widely accessible through the internet and e-publications.
- Those involved in heritage conservation should be aware of relevant international documents and charters and apply them in their work.
- CEN standards should be taken into consideration and where relevant, included in the Terms of Reference in contractual documents for cultural heritage interventions.
- For CEN standards to be widely accepted and used, new business models should be sought so that they are available without cost to professionals (see Annex 1, References).
- The ISO-9001 standard for quality management should also be noted.

### **2.3. Advancing quality principles in a changing world**

Fifty-four years after the Venice Charter articulated core principles for heritage conservation and restoration, it is timely to revise and modernize approaches in view of new developments.

#### ***A changing context***

Cultural heritage is understood as a public good. Its composition has evolved from individual monuments to cultural landscapes, urban settlements, routes and associated intangible heritage. The range of actors and stakeholders involved in processes with direct or indirect impacts on cultural heritage has widened. An array of disciplines now contribute to heritage conservation: archaeology, geography, art history, history and archives, architecture and landscape architecture, engineering, planning, economics, anthropology and sociology, law, public policy. .

Efforts to optimize the potential of cultural heritage assets for economic, social and cultural benefit are widespread. Heritage-led regeneration that would increase the attractiveness and competitiveness of different historic areas is a cornerstone of regional economic policy. This points to the need to balance heritage conservation and socio-economic development through integrated and innovative management strategies.

### ***Lessons learned***

Numerous factors have an influence on the quality of interventions on cultural heritage. An understanding of the cultural dimensions of development and the role of heritage for healthy communities form a cornerstone for excellence in conservation. Cultural heritage is acknowledged as far more than a resource for economic growth.

Identifying what kind of heritage should be transmitted to the future requires consulting communities and stakeholders as well as experts. The diversity of cultural backgrounds and resources in the EU Member States represent a source of richness.

The countries and regions eligible for EU funding share common characteristics while having specific needs and capacities and therefore capability respond to the various programmes. While in many EU countries national legislation and regulations for cultural heritage are well established and enforced, implementation in some countries is uneven. In all EU countries, specialized public agencies have the responsibility to formulate and implement cultural heritage policies and programmes. Yet insufficient capacity, in the public and private sectors, sometimes negatively affects the quality of interventions. The heritage focus is in some cases narrowly directed to the authenticity and integrity of heritage assets - in any case crucial – rather than promoting their contribution to community life. In other cases, cultural heritage is used as a pretext to build new extensions that may be out of scale or out of context. This can result in a mismatch between local community needs and the objectives of EU funded projects.

### ***Recommendations***

- Fostering the recognition of cultural heritage as a common good is a precondition of quality in interventions and sustainability.
- Cultural values should be respected when assessing overall costs and benefits of an intervention.
- Using cultural assets in respectful ways safeguards their meanings, values and inspiration for local communities and future generations.
- National legislation related to cultural heritage should reflect contemporary conditions.
- Institutions at the national and local government level which identify and manage cultural heritage may require reform in order to respond to contemporary needs.

## **3. ENSURING QUALITY OF INTERVENTIONS ON CULTURAL HERITAGE**

This section examines the critical determinants of quality at entry and during implementation for cultural heritage interventions. Among the key elements are: 1) consistency with a country's cultural policies and priorities, and development goals; 2) clarity of project objectives with associated key performance indicators; 3) consideration of technical alternatives; 4) institutional assessment and capacity building of national heritage institutions; 5) consideration of social, economic and environmental impacts; 6) risk assessment; 7) detailed implementation plan; 8) post project quality assessment and monitoring.

### **3.1. Programming at the EU and national levels**

An understanding of the determinants of quality at the stage of programming at EU and national levels is perhaps the most important of all prerequisites.

### ***Lessons learned***

During previous EU funding periods, cultural heritage has received direct investment as well as indirect funding. Much has been positive. There is, however, scope for improvement during the next EU programming phase. The responsible national heritage institutions should be at the table from the very outset. They are frequently consulted too late or not at all, with adverse effects on heritage. Heritage agencies can be more proactive if they understand who takes the decisions about the EU funding programmes, and the institutions and positions involved with their respective roles and responsibilities. The negotiation/consultation phase at EU and national level needs a solid evidence base in order to analyse alternatives and potential impacts. Effective notification and communication depend on access to information by communities, stakeholders, and experts. This promotes community engagement. The minimum project funding threshold may be high and more smaller projects may have a greater impact. Multiple examples have demonstrated that heritage values can be preserved and new uses introduced with modest investment. In some cases a large influx of funding in a relatively short period of time can create perverse incentives leading to wasteful spending and significant increases in the costs (for example in the construction), and loss in heritage values. Transparency in reporting and record keeping is essential.

### ***Recommendations***

- Attention to cultural heritage should be integrated into programming documents at EU and national levels, putting it on equal footing with other sectors.
- The EU's programming activity and funding for cultural heritage should be based on sound research and analysis, respecting the requirements of conserving and managing cultural heritage based on criteria that promote the quality of interventions and benefit to society
- Member States should involve their institutions responsible for heritage from the outset of the programming/negotiating phase and all stages thereafter.
- Successful programmes at national level should be made available by the EU to share good practices amongst members states.
- Priorities for the selection of projects to be funded should be consistent with national and regional strategic directions. Projects that have been approved by national heritage institutions should receive due consideration for EU funding and the role of the national heritage institutions in promoting quality interventions should be recognised at national and EU levels with accompanying financial support. In some instances coordinated multi-level and multidisciplinary advisory boards can help to avoid fragmented and wasteful funding plans. A long-term collaboration with international expert organizations in the sector is a potential avenue of expert input.
- Access to finance should be open for different types of beneficiaries, including the private and voluntary sectors.
- Funding of small-scale projects should be explored as well as a two-stage decision process for larger grants.

## **3.2. Project briefs and tenders**

Conducting adequate research and surveys prior to preparing briefs, terms of reference, and tenders for programmes, design or implementation, is essential to gain an understanding of the cultural heritage and its values and to ensure quality. It is the responsibility of the contracting authority to produce well-informed and implementable briefs and tenders.

### ***Lessons learned***

Briefs, terms of reference, and tenders are fundamental technical and administrative elements that set the terms of intervention. It is essential that these documents are written in clear language. They can refer to different phases of the conservation process. Their form and content thus depend on many factors: the specific character of the cultural heritage assets: the nature of the project and its objectives: the funding envelop, the activities and services to be provided: and the national legislation and regulations including land use planning.

Good practice examples of successful interventions in cultural heritage in Europe suggest that sufficient research, adherence to conservation guidelines, business planning, the involvement of qualified specialists, community consultation, investment in presentation and educational programming, proper documentation, and monitoring and management of the entire process ensure the best outcomes for heritage conservation. Research to assess the significance of the heritage asset would include: interrogation of documentary and visual evidence; detailed heritage recording and condition assessment; historical enquiries based upon direct and indirect sources; evaluation of decay mechanisms; and community consultation and possible oral history.

### ***Recommendations***

- The briefs and tenders should reinforce a conservation approach in which proposed interventions are based on adequate research – archival inquiries, investigations of the site and its setting, surveys, condition assessment, community consultation - so as to preserve the cultural heritage and uphold its cultural and associated values.
- The briefs and tenders should ascertain how the proposed intervention intends to respect the material consistency, the authenticity and values of the cultural asset.
- Project briefs and tenders should require that the benefits for the public that would derive from the proposed intervention are explained.
- Project briefs and tenders should ask for full information on any planned activities that may have a direct or indirect impact cultural heritage.
- A business plan, a conservation-maintenance and long-term monitoring plan are critical elements of any project concept.

## **3.3. Design**

Project design is an expression of an understanding of cultural heritage, its context and values. This understanding leads to quality.

### ***Lessons learned***

Design proposals should demonstrate an appreciation of the entire conservation-restoration, (re)use, enhancement, and management process. Proposals need to be based on studies (feasibility and detailed) to determine the characters and values of the cultural heritage, its state of conservation, needs and opportunities, risks and the objectives of the project. Using a log-frame matrix or its equivalent can be a way to conceptualize a project and ensure coherence among objectives, activities, outputs, and outcomes. This is a crucial step in project design and will lay the groundwork for monitoring and evaluation.

Insufficient time and financing for preparation will have a negative impact on projects (preliminary studies, analysis, diagnosis, surveys, community consultation and other essential investigations). Cultural heritage experts should be consulted at the beginning of the process, when they can influence the process positively.

Environmental assessment should include archaeological survey when a history of previous habitation or use is likely. Unplanned archaeological investigations and other diagnostic interventions during the design and implementation phases may result in delays. This can create difficulties which are hard to manage in the tight programming and financing framework of the EU Structural Funds. Additional challenges can arise when the scope of analysis changes during the project's development or implementation for different reasons.

Tourism development is a powerful argument often invoked in favour of new investments on cultural heritage. Care needs to be taken so that these interventions bring benefits to local communities and the local economy. Too often the impact of these interventions is measured only by the number of visitors attracted to a site without consideration of carrying capacity. It is well known that mass tourism can have a very adverse impact on cultural heritage sites and indeed on many aspects of local people's lives.

New uses may allow heritage – built or intangible - to continue its active contribution to society in a meaningful way. The best outcome will reinforce original values of the heritage asset. The presentation and interpretation of the cultural asset is an integral element of any intervention.

Projects motivated by ideological or political intentions or exclusively aimed at reconstructing a lost, destroyed or damaged asset/site for tourism purposes should not be funded by the EU.

### ***Recommendations***

- Analysis of the existing cultural heritage status, values, conditions and reasons for the proposed interventions should be provided for all proposals by their proponents.
- A risk assessment with mitigation measures should be provided with each project proposal.
- Where deemed desirable, a project should use contemporary creative design to emphasise and strengthen cultural values and give added value.
- New functions should respond to community needs and be compatible with the status of the heritage asset.
- Reflections on sustainability are fundamental. Green solutions must be promoted where and when possible.
- Project planning must acknowledge the need for ongoing maintenance and strengthen the capacity of local communities to look after their own heritage.

## **3.4. Procurement**

Projects with cultural heritage components require a form of contract that acknowledges the specific knowledge and skills required and possible heritage sensitivities. Flexibility in regard to timing or budget may be required as need arises.

### ***Lessons learned***

Awarding EU tenders for projects with cultural heritage elements on the basis of lowest price has been problematic. There is the need to revisit the EU's procurement methods so that they support quality cultural interventions.

Several issues have arisen that create distortions in procurement. One issue is that the EU Directive on Procurement, when applied to interventions on cultural heritage assets, often leads to the selection of large enterprises which are seen as financially robust yet may not provide best quality for specialist works. Moreover, heritage conservation often represents part of a much larger projects. Preparing the tender documentation can be complex so that large companies have the resources to apply, in practice edging out small local companies. Project managers often spend more time meeting financial requirements than on technical supervision, with adverse consequences. Another issue is that cultural heritage is often indirectly addressed by the calls in combination with other sectors and may not be known to heritage experts with the requested skills and experience.

The overall EU programming and funding systems currently in place may lack sufficient flexibility. Because cultural heritage intervention may involve unknowns that are not foreseeable in the initial diagnostic phase – the discovery of hidden architectural elements, archaeological finds, structural issues – requires allowance for change during the implementation process. Rules for procurement and contracts without such ability to adapt, can compromise the quality of the process and its outcomes.

### ***Recommendations***

- For more complex projects, a two-step selection process may be most efficient. Providing an EU funding facility for initial feasibility studies would be a way to develop good projects. This would be followed, in some cases, with funding for different stages of project development (detailed design, implementation, evaluation).

- A two-envelope system ranking the technical offer as separate from the financial one would be beneficial (standard practice in the World Bank and other international agencies).
- There is need for strong coordination during the procurement process. A designated support team with cultural heritage expertise within the scope of the funding may be advantageous.
- Improved capacity within the EU and at national, regional and city level should result from the introduction of quality principles. Multi-disciplinary teams including a cultural heritage specialist should examine the impacts on cultural heritage of proposed EU interventions, reviewing environmental assessments or cultural heritage impact studies.

### 3.5. Implementation

Successful implementation requires a comprehensive understanding of the heritage asset, professional planning and management, and good cooperation of stakeholders.

#### ***Lessons learned***

The implementation of a project is the culmination of feasibility studies and the tendering and procurement process. Full attention needs to be given during implementation to safeguarding consistency, authenticity and the use of appropriate materials, methods and technologies. Engaging skilled craftspeople is equally important. Premature and unreasoned activities pose the greatest quality risk during project implementation. Cost cutting measures that water down quality requirements – whether in relation to choice of materials, experience of staff, time allocations – may also be problematic. Ensuring that contractors understand the sensitivities of the heritage asset is paramount. The ‘design and build’ public procurement practice has produced suboptimal results in several heritage interventions.

Chance find procedures, generally set by national legislation, require a halt in construction works when unexpected discoveries occur that need additional research and/or new design solutions. Because this is often at variance with strict timelines and costs, there may be a tendency to underreport such discoveries.

In some cases technical restrictions may prevent the use of traditional materials and techniques, most often provided by local craftspeople. This may lessen the positive local economic and social impact of projects and compromise the authenticity of conservation works.

#### ***Recommendations***

- The implementation plan and management structure should be clearly defined and agreed, allowing for correction of actions and efficient use of resources.
- Communication channels should be established between workers on site and the management team; it is useful to name a contact person for conservation related support.
- Engagement of the stakeholders and end users should be encouraged during the implementation process. The presentation and interpretation of the heritage asset with a view to education and enjoyment enhance understanding and appreciation.
- The implementation process should be fully documented. The documentation should always be archived and made accessible to support future awareness and understanding of the actions taken.
- The implementation phase will need to acknowledge the inherent degree of uncertainty of any conservation work or intervention. This may include any unintentional omissions in the design or tendering phases. A contingency for any additional research, testing of materials, or other actions should be provided.
- Strengthening the capacity of public sector institutions – heritage as well as others - and local government to implement to time and budget is needed.

### 3.6. Project monitoring and evaluation

Monitoring and evaluation of project outputs and results are essential to achieve quality.

### **Lessons learned**

In projects with potential impact on cultural heritage, monitoring and evaluation need to examine these impacts from the cultural as well as economic, social, technical, and environmental perspectives to help assess the quality of the interventions.

Monitoring and evaluation design must be aligned with the objectives and context of the particular EU funded programme; they need to be coordinated at both EU and national levels so that the results can be comparable. Good evaluation is based on projects that set out objectives, planned activities, potential risks, and outcomes. Performance indicators should be developed to explore quality issues. In EU funded activities monitoring and evaluating of cultural heritage interventions will need to combine focus on financial aspects and implementation rates with that on the quality of the intervention. During the EU-level programming, design and tendering phases, monitoring and evaluation must be integrated into the total project package. Monitoring of interventions with respect to quality is yet to be standard practice. Capacity building for monitoring and evaluation is necessary at all levels of management. Independent heritage evaluators can guarantee the quality, consistency and continuity of the overall process. Mid-term reviews are a way to redirect projects as needed. In cases where monitoring and evaluation identify serious deficit of quality, project managers should be held accountable by the Member States. Equally, timely expert advice throughout the whole lifecycle of a project will help boost quality. The development of user-friendly checklists for guiding the monitoring and evaluation process will be helpful.

### **Recommendations**

- The evaluation framework should address technical, management, and financial considerations with a view to quality of intervention.
- Independent end-of-project and long-term evaluation of projects is recommended. This would include examination of cultural, technical, social, economic and environmental outcomes with attention to the impacts on local communities. An identification of emerging risks, issues and opportunities concerning the project and its setting would also be provided.
- A review of management and maintenance of the heritage assets after a five-year interval is suggested. In cases of proven high quality of the post-project management, additional funding could be awarded as a bonus to reward good stewardship.
- A 'soft touch' evaluation approach should be considered for small, low-budget projects.
- Project budgets should include adequate resources for independent evaluation.
- Data should be gathered at EU level to allow for comparison and exchange of experiences as evaluation is an important learning tool.

## **4. STRENGTHENING DRIVERS OF QUALITY**

The previous sections have highlighted areas where change at different stages of the life-cycle of the investment is needed. This section explores four external factors that can have an impact on quality: governance, risk assessment, research, and education and training. The concept of a heritage award is also presented.

### **4.1. Governance**

Governance is the process of due diligence. Good governance helps to ensure good management, good performance, good stakeholder engagement, and good outcomes. Governance is concerned with developing the appropriate structures, policies and processes to ensure successful outcomes. Good governance goes beyond fair and transparent processes that clearly set out responsibilities. It is also an attitude of mind, behaving with integrity and mindful of conflicts of interest.

Stakeholder involvement and an effective framework for collaboration and cooperation will ground the project. Sustainability and the duty to transmit cultural heritage to future generations are overarching goals. It is essential to ensure standards are met, that sufficient competence and capacity is in place to deliver quality, and that the project management structure is suitable to deliver the project. Ongoing monitoring for compliance will help ensure successful outcomes. Accountability is the cornerstone of good governance, as is sound financial management.

### ***Lessons Learned***

Issues of governance have come to the forefront in the last decade. Governments – and civil society – are more aware that the way public institutions conduct public affairs and manage public resources matters. Therefore, the process of decision-making and the implementation of such decisions is a question not only for the EU and government but for Europeans.

Tolerance for misuse or waste of resources in the cultural heritage sector has lessened. There are many examples of public campaigns to halt or revise cultural heritage projects that are seen by stakeholders to be damaging.

### ***Recommendations***

- EU funded heritage initiatives should involve civil society in decision making.
- EU institutions should uphold openness and transparency in their activities.
- EU should help ensuring clear and predictable regulatory frameworks within which cultural interventions take place.

## **4.2. Risk assessment and mitigation**

Risk assessment is a critical ingredient in achieving project quality. Integrating an understanding of risks with mitigation strategies is central to quality assurance. Common areas of risk include matters such as governance, lack of operational capacity or lack of staff, project overruns or cash flow issues and even fraud. To address such risks, most funding organisations have put into place risk assessment and mitigation strategies. Achieving a shared understanding of the application of risk management among diverse stakeholders is difficult because each stakeholder might perceive different potential harms, place a different probability on each harm occurring and attribute different severities to each harm.

### ***Lessons learned***

A key finding from current literature on risk management is the need to draw on specialised knowledge and expertise from a variety of disciplines. Calling upon cultural heritage professionals, in addition to economic, financial, and environmental experts, is a main enabling factor for quality management through risk assessment and mitigation. In some cases in past EU programmes, the role of national heritage institutions seems to have been marginalized, for example in the selection of projects at national level. Related to the issue of human resources is the importance of enabling tools (IT systems, databases, tools and guidance) to be in place. Continuous collection, aggregation, analysis and reporting of data related to risk are essential for organisations to make informed decisions.

The risk linked to the quality or the impact of an intervention itself is one component of the overall risk. It is important to understand that quality is dependent on the conditions met in each step of the life-cycle of a project. Two examples: when the focus is on encouraging a high level of expenditure or on 'correctly following procedures', the cultural heritage itself may be at risk. Another enabling factor is ensuring that the risk assessment from the cultural heritage point of view and the corresponding mitigation processes cover all stages of the life-cycle of the projects and of the funding programmes themselves. Risk management strategies should not only refer to the risk in achieving intended outcomes but also to the risk of unintended impacts of an operation. The risk management process should therefore include a quality assessment of indirect interventions. The ultimate test for quality objectives and risk management strategies is

in the long-term: has the cultural heritage been preserved for the well-being of the populations and for future generations or not?

### **Recommendations**

- Comprehensive risk assessments are fundamental to the success of cultural heritage projects. It is therefore recommended that the European Commission investigate and propose a tailored policy on risk management for cultural heritage projects and projects impacting cultural heritage
- Such risk management policy for cultural heritage should be applied uniformly throughout all its programmes.
- It is critical to build upon the responsibilities and expertise of the Member States regarding the question of risk in the conservation of their cultural heritage. At the EU level, it would be important to capture and use risk information, measuring risk uniformly and consistently across Member States and regions, and providing data for management decisions.

### **4.3. Research**

Research on cultural heritage is intended to extend knowledge and practical solutions for conservation experts as well as enhancing the understanding and support of politicians, administrators and citizens. Much multidisciplinary research in the field of cultural heritage conservation and management in Europe and worldwide is underway - from conservation methods and participatory governance to economic modelling and sustainability for cultural heritage sites.

This research activity has been made possible by public resources directed to cultural heritage throughout Europe. The cultural heritage-related research areas addressed by EC framework programs, such as Horizon 2020 and its successor Horizon Europe, or the Joint Programming Initiative on Cultural Heritage and Global Change<sup>23</sup> enable significant joint research efforts.

During the European Year of Cultural Heritage, the Commission launched a call for proposals to support the creation of a platform bringing together researchers, professionals, stakeholders and policy makers to map problems, practices and policy gaps relating to impact assessment and quality of interventions in the European historical environment and cultural heritage sites<sup>24</sup>.

### **Lessons learned**

Today the scope of cultural heritage research extends beyond conservation and restoration methods and tools to management, risk assessment, and potential impacts of interventions on the life and identity of communities. Research cooperation is broadly acknowledged as an efficient way to respond to emerging issues. There is scope to use these research results more effectively when programming and planning EU funding with potential impact on cultural heritage interventions.

Of central importance is the basic applied research that should underpin programme briefs and calls at the national or inter-regional level; this should be explicitly funded as part of EU initiatives. Developing the conceptual basis of programmes and projects needs preliminary studies to achieve high quality applications; financial resources and adequate time need to be envisaged. As the linkages of cultural heritage to many aspects of contemporary life have become more appreciated – issues of urban and rural policy, environmental protection, clean energy,

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<sup>23</sup> The JPI “Joint Programming” is an EU framework allowing concerted action between Member States and Associated Countries on public research programmes, in order to tackle challenges that cannot be solved solely on the national level. <http://www.jpi-culturalheritage.eu/>

<sup>24</sup> The selected project (in the form of a Horizon 2020 coordination and support action funded up to EUR 1.5 million for a period between 2 and 4 years) will start to run around December 2019.

governance, etc.- an integrated approach to cultural heritage research in Europe should be reinforced. Research into the economic and social value of heritage needs further elaboration

### **Recommendations**

- Support for an integrated research policy and joint programming on cultural heritage in Europe would help conceptualize the European dimension of cultural heritage. Building synergies with other EU funding programmes could bring considerable social and economic benefits.
- Research on cultural heritage interventions should be context sensitive and aware of changes in society, technology, the environment and the economy.
- Strengthening the capacity of research infrastructures to contribute to EU and national policy and practice is recommended.
- Developing interdisciplinary research and better integrating knowledge from the SSH (social sciences and humanities) field is to be encouraged. This may include research on participatory planning and management of cultural heritage and on the use of smart technologies.
- Inventories, in addition to identifying cultural assets, provide data on interventions and their impact on cultural heritage. Therefore, EU should encourage the composition and/or the permanent development of national and local inventories in this field.
- European research on cultural heritage needs appropriately scaled funding instruments providing opportunities for small projects and small actors.
- The forthcoming Horizon 2020 platform on the impact assessment and the quality of interventions on the historical environment and cultural heritage sites of Europe should build on the results of this document.

## **4.4. Education and training**

Education and training are fundamental to meeting the multi-faceted demands of cultural heritage conservation and management. The quality of education and training programmes (also lifelong learning opportunities) has a direct impact on the attainment of quality outcomes in the cultural interventions funded by the EU. There is a need to update educational and training provision so that professionals, craftsmen, and administrative and managerial staff have the tools to provide the highest standard of intervention. Similarly the sector needs to better identify the target groups to be addressed and specific gaps in the existing educational and training system throughout Europe. A group of national experts is currently investigating skills, training and knowledge transfer in the heritage professions in Europe, in the framework of the European Work Plan for Culture<sup>25</sup>. Their recommendations will be one of the deliverables of the European Year of Cultural Heritage and will be available at the end of 2018.

### **Recommendations**

- Establish provision in EU funded cultural heritage projects for necessary training or upskilling of staff within the project brief and tendering process, insofar as practicable.
- Seek the involvement, where possible, of educational and training Institutions with capacity to contribute to cultural heritage interventions and encourage relationships and networking among them.
- Quality conservation learning encompasses short and longer training courses which are based in real practice. Future conservation architects, building conservators and other practitioners should have the opportunity for training on an ongoing conservation project, to learn good survey skills, techniques of valorisation, and analysis and development of conservation proposals.
- Educational and training courses and programmes in the cultural heritage sector should regularly update their curricula so that they are abreast of technical developments and innovation.

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<sup>25</sup> Conclusions of the Council and of the Representatives of the Governments of the Member States, meeting within the Council, on a Work Plan for Culture (2015-2018) (2014/C 463/02) [https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.C\\_.2014.463.01.0004.01.ENG](https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.C_.2014.463.01.0004.01.ENG)

- A database of European training programmes and institutions in the cultural heritage sector (and possibly internationally) may be established through the EU, which would be continuously updated.

## **4.5. Rewarding quality**

Quality needs time, commitment, efforts, and dedication. It is not straightforward. Raising awareness of the issues faced in achieving quality in cultural conservation and management, and recognising achievements by those who are committed to quality is a factor that can contribute to create a positive environment. A good example is offered by the European Union Prize for Cultural Heritage / Europa Nostra Awards, an EU funded initiative that since 2002 has highlighted some of Europe's best achievements in heritage conservation and awareness raising. Independent expert juries have selected 485 award-winning projects from 34 countries. Exemplary heritage activities across Europe are awarded prizes in four main categories: Conservation projects, Research, Dedicated service to heritage conservation and Education, Training, and Awareness raising within Europe's cultural heritage sector. Good practice in adaptive and respectful (re)use of cultural heritage buildings is also rewarded by the European Union Prize for Contemporary Architecture – Mies van der Rohe Award, managed by Fundació Mies van der Rohe, granted every two years to acknowledge and reward quality architectural in Europe. To date no special emphasis has been given to EU funded projects within these schemes.

### **Recommendations**

- Evaluate the possibilities of rewarding quality in EU funded interventions on cultural heritage in the framework of existing prizes supported by EU programmes and actions (e.g, special nomination in the “EU Prize for Cultural heritage”, “Access City Award”, “RegioStars Awards”
- Look for synergies with other existing schemes and prizes.

## **5. CONCLUSIONS**

To be written after Venice

## Annex 1

### Main references<sup>26</sup>

#### 1 Recent EU documents related to Cultural Heritage

##### Relevant international documents on Cultural Heritage:

- European Parliament and of the Council - Regulation EU No 1295/2013 of the of 11 December 2013 establishing the 'Creative Europe Programme' (2014 to 2020)' and repealing Decisions No 1718/2006/EC, No 1855/2006/EC and No 1041/2009/EC1 - OJ L 347, 20.12.2013, p. 221.
- EU Council conclusions of 21 May 2014 on 'Cultural heritage as a strategic resource for a sustainable Europe' (OJ C 183, 14.6.2014, p. 36. )
- EU Commission communication of 22 July 2014 entitled 'Towards an integrated approach to cultural heritage for Europe' (COM 2014 0477),
- EU Council conclusions of 25 November 2014 on 'Participatory governance of cultural heritage' and on the 'Work Plan for Culture for the period 2015-2018' - OJ C 463, 23.12.2014, and to the 'European Year of Cultural Heritage' - OJ C 463, 23.12.2014
- EU Committee of the Regions' 'Opinion of November' 2014 on the Commission communication 'Towards an integrated approach to cultural heritage for Europe',
- Latvian Presidency of the EU Council: Final Joint Statement of the international conference "Heritage, Contemporary Architecture and Design in Interaction" - Rīga, March 12 and 13, 2015, [http://mantojums.lv/media/uploads/dokumenti/konf\\_sem\\_diksusiju\\_dokumenti/heritage\\_conference\\_joint\\_statement\\_13032015\\_final.pdf](http://mantojums.lv/media/uploads/dokumenti/konf_sem_diksusiju_dokumenti/heritage_conference_joint_statement_13032015_final.pdf)
- European Parliament resolution of 8 September 2015 'Towards an integrated approach to cultural heritage for Europe' (2014/2149) P8-TA(2015)0293: "Towards an integrated approach to cultural heritage for Europe" (TEXTS ADOPTED European Parliament 2014-2019)
- Council conclusions on the need to bring CH to the fore across policies in EU (2018/C 196/05)
- Urban Agenda for the EU, <https://ec.europa.eu/futurium/en/urban-agenda>
- HERO project - EU Urbact Programme, aimed at promoting integrated governance of historic cities and provided a guidebook on good practices in cultural heritage preservation and socialization as an important resource for local and regional development <https://urbact.eu/hero>
- European Commission, Mapping of Cultural Heritage actions in European Union policies, programmes and activities, August 2017. Available at: [https://ec.europa.eu/culture/sites/culture/files/2014-heritage-mapping-version-2017\\_en.pdf](https://ec.europa.eu/culture/sites/culture/files/2014-heritage-mapping-version-2017_en.pdf)

#### 2 International Standard setting texts related to Cultural Heritage

##### UN & Unesco

- Unesco, *Convention on the Protection and Promotion of the Diversity of Cultural Expressions*. Adopted by the General Conference at its 33rd session on 20 October 2005
- Other Unesco Conventions and Recommendations adopted by the Unesco General Conference available at: [http://portal.unesco.org/en/ev.php-URL\\_ID=12025&URL\\_DO=DO\\_TOPIC&URL\\_SECTION=-471.html](http://portal.unesco.org/en/ev.php-URL_ID=12025&URL_DO=DO_TOPIC&URL_SECTION=-471.html) and [http://portal.unesco.org/en/ev.php-URL\\_ID=12026&URL\\_DO=DO\\_TOPIC&URL\\_SECTION=-471.html](http://portal.unesco.org/en/ev.php-URL_ID=12026&URL_DO=DO_TOPIC&URL_SECTION=-471.html)
- SDGs, <https://www.un.org/sustainabledevelopment/sustainable-development-goals/>
- New Urban Agenda – HABITAT III, <https://habitat3.org/the-new-urban-agenda>

##### Council of Europe

- *Council of Europe Framework Convention on the Value of Cultural Heritage for Society (Faro Convention)*. Adopted by the Committee of Ministers of the Council of Europe on 13 October 2005. Opened for signature to member states in Faro (Portugal) on 27 October 2005. Entered into force on 1 June 2011. Available at: <https://www.coe.int/en/web/conventions/full-list/-/conventions/rms/0900001680083746>
- *Davos declaration 2018 - Towards a high-quality 'Baukultur' for Europe*. Adopted by the Conference of Ministers of Culture on 22 January 2018 in Davos (Switzerland). Available at: [https://davosdeclaration2018.ch/media/Brochure\\_Declaration-de-Davos-2018\\_WEB\\_2.pdf](https://davosdeclaration2018.ch/media/Brochure_Declaration-de-Davos-2018_WEB_2.pdf). Context

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<sup>26</sup> The validity of all links was checked on October, 31 2018

document *Towards a European vision of high-quality Baukultur*. Available at: <https://davosdeclaration2018.ch/media/Context-document-en.pdf>

- Council of Europe, *European Cultural Heritage (Volume I) – Intergovernmental cooperation: collected texts*, 2003, ISBN 92-871-4864-3
- Other cultural heritage related conventions adopted by the committee of Ministers of the Council of Europe available at: <https://www.coe.int/en/web/culture-and-heritage/standards>

## ICOMOS

ICOMOS develops a corpus of doctrinal texts as a necessary basis for conservation policies. The references below include key texts, a multilingual compendium of the doctrinal texts, as well as other useful links.

- *International Charter for the Conservation and Restoration of Monuments and Sites ( Venice Charter)*, adopted by the *IInd International Congress of Architects and Technicians of Historic Monuments meeting in Venice (Italy), 1964*. Available at: [https://www.icomos.org/images/DOCUMENTS/Charters/venice\\_f.pdf](https://www.icomos.org/images/DOCUMENTS/Charters/venice_f.pdf) (original French version) and: [https://www.icomos.org/charters/venice\\_e.pdf](https://www.icomos.org/charters/venice_e.pdf) (English version)
- *ICOMOS Charter- Principles for the Analysis, Conservation and Structural Restoration of Architectural Heritage*, Ratified by the ICOMOS at the 14th General Assembly in Victoria Falls (Zimbabwe) in 2003. Available at: [https://www.icomos.org/images/DOCUMENTS/Charters/structures\\_e.pdf](https://www.icomos.org/images/DOCUMENTS/Charters/structures_e.pdf)
- Other doctrinal texts by ICOMOS and other organisations available at: <https://www.icomos.org/en/resources/charters-and-texts>
- ICOMOS, *International Charters for Conservation and Restoration = Chartes Internationales sur la Conservation et la Restauration = Cartas Internacionales sobre la Conservación y la Restauración*. Monuments & Sites, Vol. I, ICOMOS, München, 2004, ISBN 3-87490-676-0
- ICOMOS, *Doctrinal Texts*, articles 8-10 in: *ICOMOS Rules of Procedure*, modified by the Extraordinary General Assembly in New Delhi (India) in 2017

## CEN-Standards of direct interest for cultural heritage

- BS EN 15898:2011 - *Conservation of cultural property — Main general terms and definitions*
- BS EN 16096:2012 - *Conservation of cultural property — Condition survey and report of built cultural heritage*
- BS EN 16853:2017 - *Conservation of cultural heritage - Conservation process - Decision making, planning and implementation*
- BS EN 16883:2017 - *Conservation of cultural heritage - Guidelines for improving the energy performance of historic buildings*

## 3 References related to some specific subtopics

### Monitoring and evaluation, indicators

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- JPI Cultural Heritage and Global Change. Strategic Research Agenda. Available at: <http://www.jpi-culturalheritage.eu/wp-content/uploads/SRA-2014-06.pdf>.

## Education and training and cultural heritage

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