

ICCROM
Integrated Territorial and Urban Conservation,
ITUC, Programme - Phase I (1994 - 1998)
Summary Report

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ICCROM

Integrated Territorial and Urban Conservation, ITUC, Programme - Phase I (1994 - 1998)

Operational summary of the exploratory first phase of
ITUC and its background¹

WHY ITUC

Global challenge

Historic cities and urban settlements have traditionally been the focal points of creative developments in society, the places where people have met and where creative ideas and activities have been stimulated and sustained. The oldest urban settlements have developed in the axes ranging from the Mediterranean to the Orient; subsequently, and particularly in the past two centuries, urbanization has interested all the rest of the world.

Until fairly recently, the modern conservation movement has focused on the protection and restoration of heritage identified with ancient monuments and historic buildings. However, and especially in the past forty to fifty years, the concepts of heritage and the concern for protection have extended also historic urban centres and, since some years, even to rural areas and cultural landscapes. In fact, since the 1970s, there is growing concern about the environment and the ecology of natural habitat.

To a great deal, this concern for the environment and the urban heritage has resulted from the fear that such resources and heritage could be irreversibly destroyed and lost. This is certainly due to some fundamental changes in the world society. These changes are characterized by an explosive population increase and rapid urbanization especially in the second half of the twentieth century. From 3,6 billion in 1970 the world's population has grown to 5,6 billion in 1995, and is estimated to continue beyond 7 billion by 2015. Much of this population growth concentrates in ever larger urban centres and metropolitan areas, and in areas that carry some of the most important testimonies of humanity and social evolution.

Since the 1980s, the situation has been further aggravated by the failure of previous policies. Eastern Europe is one of the regions where the society is going through a major change. Here, the people are now turning from a centrally guided socialism toward private opportunities and consumer markets. The consequences are felt in the lack of planning control, and the outdated of previous legal and administrative systems. The architectural and urban heritage are thus left subject to a jungle of ad hoc actions and investment opportunities. The political instability, poverty, financial crises, armed conflicts and frequent natural disasters add to the problems that are currently faced by many parts of the world.

Environmental concerns and 'integrated conservation'

Since the 1970s, there has been an increasing awareness of the limits of growth, as declared by the Club of Rome in the 1970s, as well as a concern for the degenerating ecological situation on earth expressed in various international meetings, such as those of Stockholm in 1972, the Habitat conference in Vancouver, in 1976, and the Rio De Janeiro conference on the environment, in 1992. The causes and principles for the consequent need for sustainability in development were written out in the *Brundtland Report* of the United Nations World Commission on Environment and Development, published in 1987 (United Nations 1987), which has been a reference for the development of ecologically conscious 'green plans' in several countries. Although the report did not discuss the conservation of cultural heritage, it prepared a basis for it. Environmentally sustainable plans are now being prepared for the management of the built historic environment as a substantial national resource and capital investment. The declaration of the Habitat II Conference in Istanbul, in June 1996, specifically promoted the 'conservation, rehabilitation and maintenance of buildings, monuments, open spaces, landscapes and settlement patterns of historical, cultural, architectural, natural, religious and spiritual value'.

The European Charter of the Architectural Heritage, adopted by the Committee of Ministers of the Council of Europe in September 1975, recognized that 'the groups of lesser buildings in our old towns and characteristic villages in their natural or manmade settings' were part of European architectural heritage. The charter declared that such heritage was in danger, partly due misapplied contemporary technology, partly due to errors and speculation in land-use management. As a necessary means for an effective protection of this heritage, the charter recommended '**integrated conservation**'. Recognizing that the restoration of historic centre areas should be undertaken 'in a spirit of social justice and should not cause the departure of poorer inhabitants', the charter recommended that conservation principles be 'one of the first considerations in all urban and regional planning' (par. 7); such 'integrated conservation' should depend on legal, administrative, financial and technical support, and could only succeed with the co-operation of all citizens. The *Amsterdam Declaration of the European Architectural Heritage Year*, October 1975, gave further weight to the concept of 'integrated conservation' of urban and rural areas.

ICCROM's response to the challenge

ICCROM's programmes have attempted to respond to the challenge of urban conservation since its inception. Urban conservation was an integral part of the International Architectural Course, ARC, organized by ICCROM, first in collaboration with the University of Rome, since the early 1960s.

Following the world-wide 1964 meeting in Venice, where the Venice Charter was produced, and that of Poland the following year when ICOMOS was founded, international collaboration increased dramatically. Many such meetings focused on problems in historic cities; such as UNESCO's 1976 recommendation concerning the *Safeguarding and Contemporary Role of Historic Areas*, where ICCROM participated in the preparation of the document.

Ultimately, considering the complexity and scale of the problems concerned, ICCROM decided to establish an '*Urban Conservation Initiative*', UCI, in 1995. The name was later changed to '*Integrated Territorial and Urban Conservation*', ITUC.

Urban Conservation in the ARC Programme

The Architectural Conservation Course, ARC, established in the early 1960s, was the first international course offered by ICCROM, and one of the first conservation courses in the world. It was an instrument for training architects in conservation, but also for the exploration of various conservation issues during a period rich in developments. The course was initially directed by Prof. Guglielmo De Angelis d'Ossat, Former Director General of Cultural Heritage in Italy and the Director of the School of Architecture, and co-ordinated by Dr. Italo C. Angle, the Secretary General of ICCROM. In 1977, the direction of the course was assumed by Dr. Jukka Jokilehto, course assistant and co-ordinator since 1972.

The study of historic urban areas was an integral part of the programme, and the various experts included: Miroslav Base, Leonardo Benevolo, Ingrid Brock, Vittoria Calzolari Ghio, Gian-Franco Caniggia, Pierluigi Cervellati, Carlo Cesari, Gian Carlo De Carlo, Salvador Diaz-Berrio, Pietro Gazzola, Giorgio Lombardi, Tomislav Marasovic, Armando Montanari, Luciano Pontuale, Roy Worskett. In parallel with the theoretical part of the course, attention was given to the study and analysis of historic areas. Some of the early initiatives resulted in a field workshop in **Tunisia** in the late 1960s, followed by a project in **Korcula**, a small historic town on an Adriatic island, close to Split. At the same time, the ICCROM Library began to systematically collect publications on the conservation planning and management of historic cities.

Capua

In 1971, the ARC course undertook a field project in the historic town of Capua,² near Naples. The project consisted of a detailed analysis of the historic fabric and conservation needs, analysis of building typology, cognisance of the distribution of activities, and assessment of the conditions of existing structures. The project was financed by the Municipality of Capua, and it was co-ordinated in close collaboration with the planners and architects responsible for the city; on ICCROM's side, the direction was assured by Prof. Luciano Pontuale and Ms. Ingrid Brock. As part of the agreement with Capua, the results were published. In his introduction to this publication, Prof. Paul Philippot, Director of ICCROM (1972-77), emphasized the importance of methodology in the protection of historic buildings within their context:

'This method should assess the values of that which should be preserved, in such a way that the archaeological, historical and aesthetic aspects of individual buildings or complexes of buildings are systematically connected with the actual social, cultural and economic life of the town and its region as well as with the planning of their future development.' (Brock, et al. 1972:6)

Kotor

In 1974, the course participants prepared a similar field analysis of the historic town of Kotor in Dalmatia as guests of the local authority. This latter workshop was directed by Prof. Tomislav Marasovic in collaboration with local experts, and assisted by J. Jokilehto. It resulted in collection of a substantial amount of data, providing a basis for further conservation planning schemes. Again, the course was able to benefit from hospitality offered by the municipality on the agreement that the results of the workshop be handed over to the municipal authorities. The material consisted of a substantial series of analyses covering the entire historic town, an analysis of the condition, architectural merits, and historical period of all buildings, their current

condition and use. In addition, proposals were made for the improvement and conservation of specific features of the city (now included on the World Heritage List).

Tivoli and Rome

Similar analyses were undertaken in the historic town of **Tivoli**, close to Rome. The direction of the workshop was guaranteed by Prof. Luciano Pontuale, Prof. Gianfranco Caniggia and J. Jokilehto. Close collaboration was established with the authorities and planners of Tivoli, who provided the basic material for the work. Caniggia later used the material prepared by him for the analysis of the historic fabric of Tivoli as an appendix in his publication on the methodology of urban conservation. Subsequently, the attention of the course was given to different parts of Rome, including the area of **Tordinona**, then a pilot rehabilitation scheme for the municipality, as well as **Trastevere**, where ICCROM itself was situated. These projects were co-ordinated by Armando Montanari and Roberto Marta. Contacts were also kept with the municipal office responsible for the historic city centre of Rome, established in 1977 under the direction of Prof. Vittoria Calzolari Ghio.

Ferrara

In the 1980s, the attention given by ARC to urban areas continued in the series of workshops and field projects organized in **Ferrara** under the direction of the city architect, Carlo Cesari. The workshops were conducted in close collaboration with and supported by the Municipality of Ferrara, who gave particular importance to conservation planning, and welcomed the opportunity to make such experience known internationally. Conservation planning in Ferrara was also closely connected with the developments in Bologna where innovative approaches were guided by Pier Luigi Cervellati; both cities became important references in the development of the methodology and principles of integrated conservation planning as expressed in the *Amsterdam Declaration* of the European Architectural Heritage Year 1975. In the late 1980s, Ferrara activities also included two international conferences focused particularly on training. The Ferrara experience was fundamental offering participants tangible contact not only with the reality of an historic city, but also with the historic territory of which this important Renaissance city was part. Since the establishment of the d'Este government in Ferrara in the fifteenth century, there has been a conscious policy to extend their administration to the entire territory. Therefore, the rivers, canals, rural centres, as well as the country residences of the family became important elements and nodal points in the management of a cultural landscape extending to the Adriatic coast. The region has been one of the areas in Italy where the government financed pilot projects in territorial planning.

Technical studies

The ARC course brought up new attention towards historic buildings, structures and materials, as component parts of the fabric of historic urban areas. These studies gave substance to the often abstract 'historical-typological' or 'morphological' studies in the planning sphere. With Sir Bernard Feilden as Director of ICCROM (1977-81), major attention was given to the management of conservation work sites, regular inspection of historic structures and the implementation of maintenance strategies. Sir Bernard also introduced the use of an architectural conservation laboratory as a complementary element to city planning and to the conservation of urban fabric, with the purpose to improve the capacity of architects to understand the behaviour of

building materials, and to develop a common language between different disciplines, field practitioners and laboratory workers. The aim was an improved understanding of the full reality in an existing settlement, these efforts were complemented with courses on historic gardens and cultural landscapes by Prof. Derek Linstrum, then Director of Studies at the *Institute of Advanced Architectural Studies*, York.

Matera

In 1993, the opportunity was taken from an ICOMOS evaluation mission to the Sassi di Matera,³ in southern Italy, for nomination to the UNESCO World Heritage List. As a consequence of this mission, a yearly field workshop was introduced into the ARC programme. The aim of the first workshop (involving Jokilehto, Linstrum, Herb Stovel, Andrea Urland, and Pietro Laureano, in collaboration with the Matera authorities) was to prepare a statement of character (following the World Heritage Committee's commitment in its 1992 twenty-year review to developing 'character statements' for inscribed sites) of the Sassi. In subsequent years (1995, 1996 and 1998), the exercise continued, and each time the focus was placed on different physical, social and cultural aspects of the urban fabric and the community. The reports have been regularly submitted to the Matera authorities who collaborated by providing guidance and source material. Special collaboration was established with the new international centre for the study of rock-hewn architecture, APOGEA, directed by Pietro Laureano. The ICCROM ARC course work can therefore be seen as part of the efforts and the on-going process of raising awareness of the significance of the Sassi and of the environment of Matera, as well as developing an analytical approach to monitoring the changes, and the development of appropriate methodologies. This process has been supported by the Italian government by the establishment of a regional centre for testing traditional materials and conservation methods.

Development of ITUC strategy

As part of the process to review its current position in the international context and in relation to current challenges, the question was put: *What has ICCROM achieved so far?* In fact, ICCROM could be seen as the foremost international organization, apart from UNESCO, to deal specifically with the conservation of both built heritage and movable property in the world. Recognized by professionals, Member States and international organizations, ICCROM had become a centre of reference for technical co-operation, training and specific know-how in relation to conservation policies, science, and technology. ICCROM had a large network of contacts and relationships in the world. Relating particularly to the built heritage, the next question was: *What are the challenges today?* It was recognized that the concept of cultural heritage had broadened rapidly in recent years and had brought in new challenges related to historic territory. Although ICCROM had consolidated its position internationally, it was now challenged together with many other institutions and individuals in search for experience and knowledge in the new areas of interest. In order to be innovative and serve the needs of its Member States, it was considered necessary for ICCROM to formulate a strategy based on collaboration and complementarity. This required new efforts in networking, and the redefinition of the role of ICCROM in areas where it could be referred to as a centre of excellence.

Recognizing the fundamental importance and urgency of further developing the methods in the conservation of historic urban and rural areas, and integrating them as

an essential part of the planning process, ICCROM decided, in 1994, to establish a special programme for this purpose. The programme was first known as the 'Urban Conservation Initiative', then renamed as the programme on *Integrated Territorial and Urban Conservation, ITUC*. In November 1995, the strategic framework of the project was approved by the ICCROM General Assembly.

The project was based on the recognition that the processes affecting historic territory were fast and well-defined, and demanded an active role from the heritage sector. There was need for environmental regulations and specific projects and subsidies, as well as a new relationship between public and private sectors, new planning tools, new arguments and new political attitudes for planners and people in general. Cultural environment should mean continuous regeneration of values, allowing gradual, sustainable change and a compatible scale of development within the existing social and physical context. There was need to work closely with the sectors of labour, industry, commerce and agriculture, as well as with the private sector in order to develop appropriate guidelines and training required by capacity building in the new situation to manage today's environment as a place for everybody.

Objectives of ITUC

Considering the character of living historic areas, and the need to manage change, the planning process needs the capacity to consider the cultural-historical significance of historic areas in balance with other issues. The main goal of ITUC is to establish an international forum with its objectives falling into the following main areas:

1. Teaching: Development of training strategy related to the conservation of historic areas, addressed to disciplines involved in planning practice and/or in teaching activities. Training strategy should involve a process with parallel developments at several institutions, and a critical comparison and 'cross-fertilization' of results.
2. Research: Establishment of a network with universities and research centres for the collection and critical assessment of existing plans related to the management of historic areas. The purpose is to identify essential elements as part of the planning process, and to develop appropriate instruments for conservation planning and management.
3. System of seminars: Creation of an international forum, aiming at the elaboration of information, and the critical discussion of the results of teaching, research and practice together with partners associated with the ITUC strategy. The results of seminars will be systematically canalized to the benefit of training and education.
4. Information centre: Establishment of an information system on research and field activities in territorial and urban planning. This system should be compatible with those created by other international organizations.
5. Technical co-operation: Establishment of an international system of networking through experts and partnerships in order to identify and assess acquired experience and diffuse this in a co-ordinated manner for use in research, training, planning and management. There is a need to transform rivalry into effective co-operation with mutual respect and professional standards.

The purpose of ITUC is to be based on the actual needs in Member States, verified through collaboration and surveys. The programme will support the development of national policies and conservation management plans, aiming at target groups that are part of planning process. ITUC is conceived as an effort to activate networking, with

major attention to training, and taking into account the specific conditions in different cultures and on specific sites. The aim is to identify qualified experts, teachers and national or regional centres as focal points and local references for a world-wide education system in the field of conservation. The purpose is to base training on the study and testing of feasible methods, and a critical assessment of the application of such methods in concrete pilot projects in a variety of contexts and conditions.

Relationship of international and regional activities

ITUC has been conceived as a system of collaboration at the international and regional levels. The aim has been to assist national agencies and institutions to form partnerships required for professional capacity building according to the specific needs of each region, and for communication and the exchange of information at the international level around the lessons emerging from regional experiences.

1. At the international level, ICCROM will identify partners with similar objectives, who are available for collaboration. ITUC activities are guided in close contact with an Advisory Group of experts, who will communicate and meet on a regular basis. Expert Meetings will allow presentation of specific themes for critical debate, formulation of policies, and recommendations. International training workshops will bring together the experience from the different regions and the pilot projects for critical assessment, counsel, and feedback.
2. At the regional level, the purpose is to collaborate with Member States for the initiation of a process identifying and assessing the current situation in planning, the needs and the existing and potential resources. Based on a critical judgement, the programme will consist of a series of actions tailored to the character and the priorities in each region.

ICCROM will continue international training programmes both as a reference and as an international forum. Such training will be complemented by regional and national training programmes, together forming a coherent system of collaboration for building up required professional capacities in Member States. In terms of resources, ICCROM will provide ITUC a minimum of funding and personnel in order to guarantee the co-ordination of the programme, and as an incentive for the various initiatives. Efforts will be needed to identify resources (human, financial, information, logistics) elsewhere, and to develop a strategy for sharing them. Perhaps the biggest challenge in the programme is the issue of management, at the same time both subject of the programme and the means for accomplishing it. This issue will be part of the development scheme in collaboration with partners and appropriate institutions.

Co-ordinating staff of ITUC at ICCROM

From its beginning in 1994 until July 1998, the programme was co-ordinated by Jukka Jokilehto. The ITUC programme's first activities were guided by efforts in 1993 and 1994 to entrust Herb Stovel and Carlo Cesari with the organisation of the urban conservation component of ARC. In 1995 and 1996, the project benefited from collaboration with Silvio Zancheti, Federal University of Pernambuco, Brazil, who undertook post-doctoral sabbatical study at ICCROM. At the same time, an ITUC team was formed with the participation of ICCROM staff members, A. Umland, M.T. Jaquinta, and S. Widmer as secretary, as well as external experts, including Francesco Siravo, Carlo Cesari and Herb Stovel. In the fall 1996, Joseph King began to collaborate with Jukka Jokilehto in programme management. Later the group of external experts

was enlarged, forming an Advisory Group. Since September 1998, the international co-ordination of the programme has been assured by Herb Stovel.

ITUC, INTERNATIONAL ACTIVITIES

In the period from 1995 to 1998, the principal international activities of ITUC included the establishment of contacts with international organizations (especially UNESCO, ICOMOS, and the World Bank). Four Expert Meetings were organized, the first taking place at ICCROM in February 1995 ('Urban Conservation Initiative', UCI), the second at the University of Montreal in Canada, April-May 1996, the third at ICCROM in April 1997, and the fourth in Recife, Brazil, October 1998. The ITUC-97 International Workshop on Integrated Territorial and Urban Conservation Planning was organized at ICCROM from the end of February to the end of April 1997.

1st Expert Meeting; Inception of the programme, Rome 1995

The first expert meeting on the conservation of historic areas, 'Urban Conservation Initiative', UCI, took place at ICCROM in Rome from 16 to 18 February, 1995. The meeting was attended by 18 participants representing: UNESCO, International Scientific Committees of ICOMOS (CIF, CIVVIH, Wood, Vernacular), Organization of World Heritage Cities (Quebec), Council of Europe Training Centre for Crafts (Venice), ICCARHE (Ferrara), Norwegian Directorate for Cultural Heritage, Institut National du Patrimoine (Tunis), ADER-FES (Fez), R. Lemaire Centre for Conservation (Leuven), Institute of Advanced Architectural Studies (York), University of Ferrara (Ferrara), Centre for Built Environment (Calcutta), The Norwegian Institute of Technology (Trondheim), Mediterranean Centre of Architectural and Urban Heritage (Split) Centre d'Études Supérieures d'Histoire et de Conservation des Monuments Anciens (Paris), Institute for Heritage Education (Montreal). The meeting was chaired by Marc Laenen, Herb Stovel acting as the synthesizer and Jukka Jokilehto as rapporteur.

The meeting conceived 'urban conservation' in the broad sense as related to historic areas in general, and in the spirit of the UNESCO Nairobi Recommendation of 1976. The general aim of the Workshop was twofold,

- * to establish an international network as a vehicle for the exchange of ideas, co-ordination of programmes, and improving the effective use of resources;
- * to prepare recommendations concerning appropriate strategies in the conservation planning of historic areas.

Objectives of the meeting

The objectives of the meeting were to:

- 1) identify existing initiatives in capacity building: scope, target groups, working context, support structures, organizational mechanisms, future concerns and plans;
- 2) define a vision for training in urban conservation, identifying goals and considering the requirements of different target groups and situations;
- 3) identify principal topics and priorities, and how these are seen by different groups, issues being explored, resources, and who is carrying out significant research;
- 4) identify possible joint ventures among groups and individuals, avoid overlaps and use properly the limited resources;

- 5) identify means of exchange of information and communication;
- 6) nominate a working group to further elaborate the results of the meeting, and to advise on the organization of future contacts within the network.

Topics of debate

The meeting was organized partly in plenary, partly in small working groups. In the discussion the meeting noted the different actors in the planning process and conservation management (institutions, politicians, administrators, professionals, technicians, educators, population). International organizations involved in heritage management should think together, and work with state agencies, local communities, enterprises and training centres, to develop new types of training and awareness programmes. Organizations such as World Bank should be encouraged to integrate heritage concepts in their programmes.

The role of conservation professionals in the decision making process needs to be clarified, and it is essential to encourage inhabitants to participate. Conservation management will refer to heritage as a resource issue, and should adopt objective means that are clear to everybody. Some of the main problems at present result from rapid development, insufficient legal provision, difficulty in interdepartmental co-ordination of planning, execution and monitoring. Conflict management should be included in the scheme, as well as promotion of strategic thinking, advocacy, legal regulation, and clear action plans.

Some of the main issues to be covered in training include: clarification of values, setting laws and measures vs. national policy, information management, as well as conflict solving. Risk preparedness process and monitoring could be used as test models to identify weak points. Training should be constantly evaluated in order to form a basis for the next event, and it should be rather spontaneous not to lose the momentum. The process for getting from a model to action could involve establishing commissions in relation to specific issue, such as identification and understanding of values, integrated planning based on shared values, and strategic thinking leading to advocacy, legal regulations and execution. For each issue there should be corresponding action at the local, national, regional, and international level. Results that are achieved should form a filter to test new projects.

Recommendations concerning an action plan

The general aim of the action plan for development of training in urban conservation is to facilitate the implementation of heritage conservation awareness in the decision making process in relation to urban and rural planning. Specific goals for a coherent training strategy are: to develop ICCROM as a resource centre for training; to develop a network of supporting partners; to build a network of trainers; to identify people who can share experiences and diffuse knowledge, and who are qualified to deal with specific issues relevant to the actual reality; to promote a system approach to training, involving a global vision, strategic planning, tactical problem solving techniques, implementation procedures, preparation of operational guidelines, and the use of monitoring tools. Furthermore, there is need to produce and diffuse 'key documents' on training strategies and urban conservation management; create an urban conservation team within ICCROM for the implementation of training programmes, pilot workshops in different countries, and international sessions at ICCROM.

2nd Expert Meeting, Montreal 1996

The second expert workshop was organized at the University of Montreal, from 29 April to 1 May 1996, by ICCROM, University of Montreal, OWHC, and the Canadian Urban Institute with the participation of representatives of ICOMOS and UNESCO, and experts from national and local institutions, administrations and universities in North and Latin America, Africa, Asia and Europe. The plenary sessions were chaired by Herb Stovel; Jukka Jokilehto was rapporteur.

Scope of the workshop

The focus of the meeting was to further explore the problems related to the field of historic areas, and particularly to providing input into the forthcoming international training programme at ICCROM. The goal of the meeting was to define objectives, the key elements and considerations, as well as the key messages for the ITUC programme in general. The invited experts of the workshop presented problems and challenges faced in their own countries. The three main issues were identified as: heritage values and evaluation (why we conserve?), conservation planning process in relation to historic areas (how we manage conservation planning?), and the promotional and catalysing functions required in modern society (who are the actors and partners in the process?). These three issues were also identified as topics for working groups which met during the meeting to discuss them more in depth.

Participants

The principal organisers of the meeting were ICCROM, the University of Montreal, The Organization of World Heritage Cities (OWHC), and the Canadian Urban Institute (CUI), which had projects in the Baltic States. The meeting was also attended by representatives of UNESCO, ICOMOS and its international scientific committees CIF and CIVVIH, the Canadian ICOMOS Committee, as well as a selected group of experts representing several countries and continents. Professionally the participants were urban planners, architects, landscape architects, archaeologists, lawyers, economists, historians, museum managers, specialists in risk preparedness, educators and teachers, representing different types of institutions in the management and administration (Canada, USA, Russia, Lithuania, Hungary, Tunisia, Sri Lanka, Tanzania, Czech Republic), in the field of training (Universities of Montreal, Budapest, Recife, Moratuwa, Savannah), as well as municipal authorities (including Budapest, Quebec, Telc, Vilnius, and Zanzibar).

Main topics discussed

The notions of 'urban' and 'territorial' should be understood in the broad sense as referring to urban and rural areas in their territorial context. Considering the relevant terminology, one can identify the notions from historic area to the built and natural environment, showing how the concept of cultural heritage has rapidly broadened in its scope. Cultural landscape, in its recent definition, refers to an area that has matured as a testimony of harmonious interaction between nature and human interventions over a long period of time. While landscape would principally refer to natural or rural scenery or area, cultural landscape (*site culturel* in Tunisia) would emphasize cultural aspects; these concepts can overlap depending on the emphasis given from the planning point of view.

The notions defining cultural heritage in its different aspects are related with the terminology describing conservation action, ranging from conservation to sustainable development. It is understood that historic areas and their surroundings form a whole composed of human activities, buildings, and spatial organizations. Integrated urban conservation refers to the need of integrating conservation methods in the urban planning process so as to allow for sustainability of development in relation to existing resources, and taking into consideration the character and significance of the area.

The integration of conservation criteria into the urban and territorial planning process should be carried out through the development and use of appropriate *planning tools*. The process involves several phases and should allow the identification of the *character and specificity* of the historic area, an understanding of the evolution of the type and form of the settlement and the urban structure, the criteria and patterns of functions and uses. In the former socialist countries, there was a need for a *global approach* to the management of cultural and natural environment, in order to allow for *sustainable evolution and change*. In order to integrate heritage values into community development, it was necessary to encourage communication with and raise the awareness of politicians, property owners and the general public.

One of the key issues that emerged from the Montreal Workshop were the values and the need to raise awareness of key sectors in society.⁴ The process will require dissemination of information, and empowerment of local population, and it should lead to a negotiation of a consensus on commonality of values. On this basis, it is possible to develop a conservation process, and the role of values is reinforced by assuring the continuation of such a process. Considering that values should be related to a community, it will also be important to define what constitutes a community. In this regard, a *Heritage Region* was defined as an area where the population worked together to maintain and improve its quality of life, capitalizing on the historical and environmental forces which create a community of interest. Conservation should thus be an integrated approach, involving people's empowerment and collaborative management; the economics should be related with sustainable development based on the resources of the region.

Conclusions

The meeting did not draft formal conclusions, but the outcome of the discussions was assessed with the following comments:

The meeting recognized that ITUC had now already formed a platform where different partners can meet, including governmental institutions, NGOs, and others. It was important that this platform should continue. The meeting noted that the main focus of the debate had been on needs, but that one should also think of hopes and aspirations. International networking required strengthening, improved collaboration, identification of partners, and efficient information management. In order to make it functional, there was need for a strategic plan of action, based on the assessment and improvement of the current situation. Training programmes should be integrated into a system, including databases and sharing of information. It was noted that ICCROM's course on the conservation of historic areas would be organised in 1997, following the recommendations of the first expert meeting in 1995. The meeting further considered it useful to explore the possibility for internships in other institutions or practice on site, in order to learn how things are done elsewhere. It was observed that the Internet can be useful in collecting information in a systematic manner. The idea of an open university model for training could also be tested using the Internet connection.

3rd Expert Meeting, Rome 1997

The third meeting of the ITUC Advisory Committee was held at ICCROM from 14 to 16 April, 1997, in conjunction with the eighth week of the ITUC-97 international training workshop. In attendance at the meeting were 17 participants of the ITUC-97 workshop, 13 invited members of the Advisory Committee, and 4 persons from ICCROM including workshop staff.

The meeting was divided into 5 half-day sessions, including presentation of reports on the ITUC programme, and on the ITUC-97 international workshop, as well as presentations by the workshop participants and by attending organizations.

Summary of issues discussed

The ITUC-97 training workshop was prepared through a process, and the key issues were in: participatory planning, planning by objectives, and planning the involvement of participants as learning resources. Emphasis was placed on what could be learnt rather than on what could be taught. The meeting expressed a general satisfaction with the direction that the overall programme and the workshop were taking. At the same time, it was necessary to consolidate the gains that had been made. Appreciation was expressed at the participatory method used to design the workshop, as well as the emphasis on conflict resolution, conflict solving, and relational skills. There was now a need to develop clear methodologies in order to deal with the complex situations found in different cities and communities.

The main issues of the workshop were articulated into: values, planning process, management, and relational skills. The reports by participants dealt with: working definitions and introduction to planning methodologies; values; historic investigation, investigation of current conditions, and future vision of the city; the legal and administrative framework and integration of planning into the larger planning framework; the city in its territory; economic and financial management and tourism; citizen participation, forming partnerships, advocacy, lobbying and promotion; risk preparedness.

The members of the Advisory Group were impressed with the quality of the reports. They commented on the fact that the level of professionalism was high, and were impressed with the calibre of discussion that had been achieved over the course of the workshop. Much of the discussion that followed centred around the issue of values and how they should be approached by conservation planners. There was a feeling that conservationists must be careful in speaking about common values. It was argued that there is great difficulty in trying to reach some sort of a common base. Instead, cultural diversity must be recognized. There is need for special attention to local values and local conditions. This seems to be the level in which any discussion of values would be most operative. In fact, it was pointed out that, often, even within a local community, there will be a diversity of values that must be taken into account.

Considering the future of the ITUC programme, the issues that came out from the debate included the following:

Continuity: There is a strong need to guarantee continuity for ITUC. The work done so far has been useful and a good start, but, as a pilot programme, there is still a need for development. Work must begin immediately in order not to lose the momentum.

The regional and international levels: There is a need for programmes on both the regional and international levels, feeding each other in a circular mode. International

courses guarantee an overall process for the examination of relevant issues. These issues are then taken to the regional level where they are processed and used for specific situations, dealing with the conditions and problems on the ground. In turn, information from the regional initiatives must then be fed back up to the international level in order to reformulate global policies to help them meet local conditions. This forms a continuing dialogue between the two levels of action, providing sustainability and intellectual support for each other.

International Workshops: This international workshop had been a positive experience and there was a need to continue events at this level. There are several suggestions as to the possible future aims of the international workshop, such as training of regional trainers, processing issues in a global perspective, finding the commonalties which can then be fed back to the regional level to find the specificity, and discussing practical management-based issues of conservation. There needs to be a focus on the process, rather than just the content, and an important aspect in the future was clearly the issue of communication.

In terms of content: Conservation must be seen within the overall economic, planning, and development context of a given situation. There is need to discuss conservation as it applies to the issue of sustainability, taking into account social, cultural, and economic issues. An important part of the international workshop effort could be to work out a consensus regarding the definitions of terms. There is need to recognize that each region and locality has different ways of doing things, and an international course should be careful to present them in a systematic way.

Regional Initiatives: Regional initiatives need to be grounded in the specific issues that pose the problems and challenges to that specific region. There should be research components, awareness components, training components, capacity and institution building components, co-ordination components, but, at the same time, the projects must be kept at a manageable level.

Co-ordination of International activities: On the international level, ICCROM needs to maintain a strong co-ordination and control over its regional projects in order to avoid duplication and make sure that benefits from one region can be shared, where applicable, in other regions. ICCROM can also be used as a co-ordinating mechanism within a particular region in regard to the variety of conservation related projects in that region.

Network: ITUC must build a network of communication between the regions and on an international level, starting with the participants of ITUC-97. The use of internet is to be considered seriously as a means of communication for ITUC, seeing that it is becoming feasible even in developing countries. Universities should be involved in the various ITUC initiatives. Care should be taken, however, that the research have the necessary real world elements in it.

Database or Repository of Information on Integrated Conservation Planning: It was suggested that ICCROM institute a system of keeping a variety of information related to integrated conservation planning including: legislation, norms, codes, and regulations; master plans and other planning instruments; information on organizations involved in conservation planning; their activities, what events they are sponsoring etc. This could be carried out in collaboration with ICCARHE or other institutions. It was suggested that it might be useful to organize this on the regional level, with each region handling its own information (monitoring and updating it).

This could then be co-ordinated by ICCROM which could facilitate the transfer of information between the regions.

4th Expert Meeting, Recife 1998

The fourth expert meeting of ITUC took place in Recife, Brazil, jointly with the Second International Conference on the 'Integrated Conservation and Urban Sustainable Development: a Theoretical Approach', from 5 to 9 October 1998. The conference was attended by some 250 professionals from all over Latin America, being a great success. The ITUC meeting was attended by a group of 30 invited experts and members of the Advisory Group. In addition, other two meetings were programmed in the same context, including a meeting of World Heritage City managers, co-ordinated by the Organization of World Heritage Cities with the support of the Getty Conservation Institute, and the meeting of the ICOMOS International Training Committee, CIF. The overall organization of the events was guaranteed by CECI with the general direction of Prof. Silvio Zancheti.

Issues discussed in the meeting

Summary of the development of the ITUC programme, including a report on its achievements until the present, and recommendations for the future.

ITUC-97 International Training Workshop, Rome 1997 ⁵

The training programme, '*An Integrated Approach to Territorial and Urban Conservation Management*' with particular emphasis on the Conservation of World Heritage Cities, was organized at ICCROM from 27 February to 28 April, 1997. The workshop was designed to serve two principal target groups: 1) mid-career professionals involved in or leading the process of territorial and urban conservation, and 2) specialists involved in teaching this field. The purpose of the course was to establish an international forum for the critical comparison of experiences, methodologies, and the development of guidelines for conservation management.

Following from past experience at ICCROM, and considering the complexity of the planning process, an in-depth training with benefit would require several weeks. On the other hand, there were financial and other technical limitations. The length of two months was considered a reasonable compromise between the different requirements, allowing to choose some topics for detailed examination in the light of current experience, and to guide group work to further an understanding of the conservation process and policies in relation to the specific cultural, economic and social conditions that prevail in different cultures and regions.

The project was the responsibility of J. Jokilehto in consultancy with Silvio Zancheti, Carlo Cesari, Francesco Siravo as external experts, and an ICCROM team consisting of Maria Teresa Jaquinta, Andrea Urland, Anna Stewart, Sonia Widmer, and Joe King. The person most closely involved both in the preparation and the day-to-day execution of the project was Joe King, employed as assistant co-ordinator. The work followed a systematic process, based on advice by a professional training consultant, Mr. Gabriele Diviso.

Preparation of the International Workshop

The diagnostic process for the preparation of the course consisted of the following main steps:

- The development of a model of required competencies, based on the judgement by experts and on task analysis;
- The assessment of the present level of performance, starting from a hypothesis checked through a questionnaire, circulated to field professionals and teachers;
- The assessment of gaps between the model and the present performance, aiming at the definition of learning objectives;
- Designing a learning plan, turning needs into learning objectives, identifying learning activities, indicators for evidence of learning, and designing the structure and format of the learning experience.

It was noted that the ITUC workshop should be structured to suit the learning expectations of experienced professionals, and making the contents problem oriented, realistic and pertinent. Trainers should be considered as facilitators, and participants together with trainers should be learning resources. Evaluation of the workshop should be made by the learners themselves.

The desired model profile of professionals to be trained was translated into the form of a questionnaire, listing the set of competencies as a hypothesis regarding the knowledge (facts, ideas, concepts, examples, data, etc.), skills (intellectual, technical,

operational), and attitudes (relational skills implying a high degree of consciousness of human behaviour and dynamics) required by professionals in the field concerned. The questionnaire was circulated to the experts who had participated in the expert meetings, as well as to others, including all candidates who applied to the course. The questionnaire was answered by persons from 41 countries, representing urban planners, conservation architects, historians, government officers, and teachers. The needs that were indicated as requiring most attention in the conservation planning of historic urban and rural areas, included:

- focus on **economic variables** at the macro and micro levels, and integrating urban conservation into the general economic development process;
- focus on **urban conservation and the environment**, including the ability to place conservation within an overall environmentally sustainable framework;
- focus on need to **disseminate information**; sources of information must be made available for the different groups who participate in the planning process;
- focus on **developing countries** operating with scarce resources, and with lack of infrastructures, lack of significant local models, lack of trained professionals;
- focus on **influencing policy and policy makers**, noting the inflexibility of some bureaucracy and regulation (many only pay lip service to conservation);
- focus on **community** was considered as important as influencing policy makers; heritage must be a value for every citizen;
- focus on **integrated conservation planning and management issues**; training should be cross-disciplinary, but without loss in depth for each individual.

Structure of Workshop Programme

All the answers to the questionnaire were collected and analysed in a systematic manner. In the analysis, attention was given to: reference to the background of the respondent, key concepts coming out of the responses, indications on the competence analysis, suggestions and additions, as well competence priorities. The following priority areas were thus identified as a basis for the contents of the workshop:

- 1) Related to the analysis of the existing situation of the territory concerned:
 - Ability to identify and interpret values and their relation with the physical and functional structure of the city. The related objectives include increasing the ability to identify the critical points and their dynamics within the set of values of a local or regional context.
 - Ability to investigate the historic development process of a city, the main constraints, political and economic forces and actors that have driven the process in the recent past. The objectives include increasing ability to analyse critically different approaches to historic investigation.
 - Ability to read and interpret the main data for the physical, social and economic characterisation of a city, with the aim of fostering a perspective view of its development and future. The objectives involve ability to understand the methods and 'systemics' undergoing the design of future scenarios.
- 2) Creation of the conservation master plan:
 - Ability to develop planning methods and tools for the preparation of plans and projects in the conservation and development of a historic city. Amongst the objectives there is a need to increase knowledge of approaches and techniques required for the study of feasibility plans, understanding the economic and political constraints, and having an ability to reach stated objectives within the planning process.

- Ability to lead and motivate team work in the conservation planning process with the objective of enhancing awareness of diversity as a group resource and of the potentials and limits of personal styles of leadership management.
 - Ability to deal and negotiate with different interpreters and actors and conflict situations in the planning process. One of the principal objectives is ability to activate basic problem- and conflict-solving strategies.
- 3) Implementation and management of the plan:
- Ability to implement and manage integrated conservation plans, including legal, administrative and political frameworks, forming relationships and partnerships, monitoring and maintenance planning, planning for and management of crisis situations, and identifying the role of the conservation planner in the management process.
 - Ability to establish contacts and involve different actors in the integrated planning and development process, with the principal objectives of increasing knowledge of the tools and techniques for social communication regarding promotion, lobbying, advocacy and fund-raising, and paying attention to enhancing effective communication with the public.

The listed issues were first transformed into learning objectives, then identifying the preferred training approach and activity, the resources (staff, invited experts, participants) required, the time, and the means of verification. In the building up of the course structure more in detail, the above considerations were taken into account in a systematic manner. On the arrival of participants, at the beginning of the workshop, time was dedicated to the establishment of agreements on the expectations from the side of participants and from the side of organisers. Special attention was given to learning about relational skills, communication and conflict solving. Such techniques were immediately put into practice by involving participants in refining the contents of the course, and agreeing about their personal contribution to the different sections.

The general scheme of the course by subjects was as follows:

Subjects	Hours	% of total
General sessions, evaluations, etc.	42.50	18 %
Integrated Planning	28.25	12 %
Values	10.50	4 %
Investigation and analysis	15.00	6 %
Administrative & legal frameworks	12.75	5 %
Economics, finances	12.50	5 %
Community, partnerships	20.00	9 %
Relational skills	22.50	10 %
Visits, study tour	52.00	22 %
Individual study	18.00	8 %
	234.00	

Selection of Candidates to the Training Workshop

In the selection of trainees, the selection criteria were defined in harmony with the learning objectives. The total number of applicants was 67, representing 38 countries from Europe, Middle East, Sub-Saharan Africa, Indian Subcontinent, Southeast Asia, Central and South America, and North America. The selected group of participants of

the workshop was an international group of rather senior, mid-career professionals (the average age was 41 years) from: Western and Eastern Europe, Middle East, Sub-Saharan Africa, Indian Subcontinent, East and Southeast Asia, as well as Central, South and North America. Nine participants had PhD qualification, and 13 were University Teachers. Other professions included government officers, leading architects, senior urban planners, and directors of conservation.

Conclusion on the Workshop

The course became an international expert workshop, and a moment of reflection in order to define concepts and values, to compare the planning requirements of different types of areas in relation to their cultural environment, and to identify the effectiveness of processes. There was discussion about potential models for regional initiatives, and the development of relevant management guidelines. The members of the course decided to establish an international network of professionals to support each other in the future. In the course programme, particular attention was given to relational skills, and negotiation and problem-solving techniques, emphasizing participation of all sectors of population in the conservation planning process. While each heritage site has its specificity and values, it was confirmed that there was a need for a continuing dialogue between different regional and international initiatives. Programmes at the regional and local levels could provide concrete data on the content referred to specific realities and case studies, while the international forum would enable participants to examine the process, identify common features and develop methodologies as a support to planning and management in continuously changing situations. It was agreed that sustainability was essential not only in relation to environment, but especially concerning social, cultural, and economic issues.

ITUC, REGIONAL INITIATIVES

Regional initiatives have included a series of missions to different regions, such as Latin America, North America, Central and Eastern Europe, Sub-Saharan Africa, North Africa, the Near and Middle East, South-East Asia, and contacts with national authorities, and various organizations, institutions, and universities. Two major regional programmes have been started in this period, one in Brazil for **Latin America**, the other in Lithuania for **N-Eastern Europe** as will be reported below.

In **North Africa**, the initiatives will be conceived as part of the on-going regional programme for Maghreb countries, where a training course is foreseen in Fez, and a regional conference in Marrakesh. In **Western and Central Asian** countries, the issue of planning in historic cities is included in the programme initiated with the first Regional Conference for Western and Central Asian countries, organized in Tehran in 1995. The secretariat for this programme has been established within the Cultural Heritage Organization of Iran. A meeting for programme strategy was held in Tehran in November 1998, and the next regional conference is planned in **Georgia** in 1999 with urban conservation as its main theme. Contacts have been established with the Aga Khan Trust for Culture to participate in the development of a training component in the programme in **Samarkand**, to sensitize authorities about the significance of traditional habitat.

At the invitation of the World Bank, and together with UNESCO and the Getty Conservation Institute, in July 1996, Francesco Siravo undertook a mission on behalf of ICCROM to **Mali** to examine the feasibility of initiating international campaigns related to two World Heritage Cities, Timbuktu and Djenne. ICCROM's proposal was to collaborate in the case of **Timbuktu**, and to co-ordinate a regional field workshop addressed for young technicians. The purpose will be to analyse selected areas and related urban communities, to identify their qualities, problems and specific needs, and to propose alternative solutions, guidelines and priorities for planning and conservation management in the framework of the World Bank guided master plan.

Contacts have been established with several universities and learning institutions for collaboration. The University of York has organized an international workshop on urban conservation issues in July, 1996. Collaboration is established with the European Training Centre of the Council of Europe in Venice, who will integrate the general scheme with issues at the practical level, focusing to technicians and operators. There is a potential to benefit from initiatives that aim at a comparative analysis of planning methodologies, such as the recent project, URB-AL, financed in the European context, to compare planning in selected historic cities in Latin America and Europe.

In agreement with Prof. Serge Domicelj, the former President of AIU, ICCROM undertook a feasibility study in **south-east Asian** countries in order to initiate training programmes in the conservation of historic cities. The purpose of this initiative was to contact universities interested in urban planning and conservation, and to establish a regional network jointly with local authorities in selected communities for the development of a survey on needs, and the preparation of a regional training course in line with the Latin American project.

Regional Programme for North- Eastern Europe

Building the programme

The ITUC programme for NE Europe began with the invitation of the Vilnius CUI office to collaborate in the development of a cultural heritage training programme for Vilnius. The CUI, charged by CIDA, the Canadian International Development Agency, with fostering 'democratic decision-making mechanisms' in the Baltic Republics and working through its programme for Baltic co-operation in Tallinn, Riga, and Vilnius, had invited Prof. Herb Stovel of the University of Montreal in September 1995 to advise the municipality on possible means of improving effective public participation in urban conservation. The success of this mission, and growing realisation of the importance of Vilnius as a World Heritage City, led to a further invitation of Prof. Stovel in late 1996 to begin to develop a training course for urban managers involved with conservation issues. Prof. Stovel turned to ICCROM as a partner well positioned to increase the potential impact of CUI efforts.

This well corresponded with ICCROM's interest in developing urban conservation training in Eastern Europe to address the problems of conservation planning and decision-making in 'transition economies'. This interest had been explored during a mission carried out in May 1996 by Jukka Jokilehto and by Director General Marc Laenen's participation in an International Donors' Meeting, organized by the World Bank and UNESCO in spring 1997, to develop a revitalization strategy for Vilnius Old Town.

As a result of these initiatives, ICCROM commissioned Prof. Stovel to carry out a needs' assessment of urban conservation efforts in NE Europe in late spring 1997, and to organize a co-ordination meeting of international agencies for urban conservation in the region in order to prepare with the CUI, and the Lithuanian Ministry of Culture, a pilot course in urban conservation management in October 1997.

1997 Activities

The course was prepared in detail by a Task Force of local professionals and officials, representing various agencies involved. The training programme was organized jointly by the Canadian Urban Institute, ICCROM, and the Lithuanian Ministry of Culture, and it took place at the Urbo Kalnas Training Centre at Nida, on the Baltic Coast, from 27 to 31 October 1997. Participants included 40 public sector managers at the municipal, county and national levels, as well as planning professionals from major historic cities in Lithuania, Estonia, Latvia and Belarus. Lectures were given by professionals from Lithuania, Canada, USA, Scotland and the Netherlands. The Lithuanian Ministry of Culture made a significant financial and intellectual contribution to the course, in aiming to strengthen appreciation of Lithuanian conservation expertise and know-how in the Baltic region. An important contribution was also made by the Edinburgh Old Town Renewal Trust, working closely with the Vilnius Old Town Revitalisation Agency. Significant contribution to the co-ordination of the preparations was done by members of ICOMOS Lithuania, its President Aundronė Kasperaviciene and Arunas Bėksta, former Vice-Minister of Culture in Lithuania, who acted with Herb Stovel, as co-facilitators of the course.

The course was designed to focus on the needs of two target groups:

- Middle level and senior municipal and state managers, administrators, decision-makers, whose decisions affect the heritage values of historic cities;

- Senior conservation specialists interested to update their skills and become aware of comparative approaches to similar problems outside Lithuania.

While these audiences had different experiences and interests, the pilot course treated them together given the needs of the two groups to improve collaboration for effective urban heritage conservation. About half of the participants had teaching roles of one kind or another. The process for the development of the course was based on certain guiding principles in response to perceived needs at local level, i.e., establishing operational ties with key local groups and key local professionals, the use of local steering committee to clarify needs, review and refine course framework and identify appropriate teachers, speakers and facilitators, perceiving the course as a workshop based on exchange, and taking it as a first step in a long-term process of building capacity in participants.

In the assessment at the end of the course, its success was considered to have been reflected in several ways. First of all, participants were involved by course presentations and discussions and were prepared to stay late without complaint; they clearly felt they were part of something special and worthwhile. The participants wrote the *Resolution of Neringa*, which reflects the degree to which the course succeeded in transferring some of the needed management skills. The relatively new approach to training in this regional context, consisting of discussion and debate more than set-piece lectures, was considered useful and was much appreciated. The process of organising the course built valuable long-term partnership between the participating organisations; it allowed cost sharing and improved the quality of the product. The experience gave useful indications for the organisation of similar training in the future, including the importance of using workshop-type learning processes, encouraging the participation of non-heritage professionals and managers, and breaking down the barriers between 'western' and 'eastern' planning stereotypes.

The first workshop on Integrated Urban Heritage Conservation showed that historic cities do not have to become museum areas. Rather, heritage conservation may serve the purposes of encouraging municipal economic development and creating community well-being. Such activities can attract businesses and visitors, and through associated restoration activity, generate new jobs. Satisfied with the results, the organisers decided to repeat the training programme for a broader audience in the following year, to develop other training programmes on specific themes, and to arrange an international seminar on infill in historic cities.

1998 Activities

Regional Training Programme for Latin America, Recife

Building the programme

The ITUC programme for Latin America was initiated in Brazil, and named ITUC/BR. The background for this development was the 'First International Seminar on Strategies of Intervention in Historic Areas', organized in Recife in August 1995, where ICCROM was represented by J. Jokilehto. As a result of this first contact, there developed a collaboration between the Federal University of Pernambuco and ICCROM. In particular, Prof.Dr. Silvio Zancheti, the co-ordinator of the first seminar, decided to undertake a post-doctoral research period at ICCROM in Rome, from September 1995 to August 1996, focused on the conservation of historic cities. At ICCROM, Zancheti was involved in the preparation of ITUC-97 workshop as well as participating in the 2nd Expert Meeting in Montreal. Back in Brazil, he contacted the Federal University of Pernambuco, UFPE, and initiated the process for ITUC/BR.

The first issue was the establishment of CECI, *Centro de Conservação Integrada Urbana e Territorial*, within the Federal University, and with the objective to promote awareness, education and research in the field of territorial and urban conservation adopting the perspective of the sustainable development. The activities of CECI are directed to the Brazilian and the international academic and technical community, and the specific objectives are: to organize specialization and extension courses to promote sustainable development; to develop research on integrated conservation themes; to promote conferences, meetings and seminars; to develop methods of analysis, assessment and intervention; to provide technical assistance to the community; to promote the exchange of lectures and researches between the UFPE and internationally recognized conservation centres.

1997 Activities

The first course on Integrated Urban and Territorial Conservation, ITUC/BR, was organized from 15 August to 15 December, 1997. It was part of the activities of the Master Programme in Urban Development (MDU) of the Department of Architecture and Urbanism (DAU) at the Federal University of Pernambuco (UFPE). It was set up in collaboration with the UNESCO World Heritage Centre, ICCROM, and the National Institute of the Historic and Artistic Heritage of Brazil (IPHAN).

The course consists of 360 hours of teaching, and lasts four months. Having successfully completed the course, the participants are awarded a specialist certificate, and can then apply to a research project to be developed into a Masters Dissertation. The course is principally addressed to two target groups: a) professionals involved in or managing urban and territorial conservation programmes, plans and projects (town planners, architects, economists, managers, and others); b) trainers and teachers in the field of urban planning and urban conservation. In the first course, there were 19 participants, mid-career professionals, mainly from the area of Recife, but also from other parts of Brazil, as well as from Bolivia, Peru, and USA. The second course took place one year later in 1998.

The persons who organized and taught the course within CECI were: Prof. Silvio Mendes Zancheti (Co-ordinator), Ms. Germana Zaicaner (Assistant Co-ordinator), Prof. Fátima Furtado, Prof. Fernando Diniz, Prof. Geraldo Marinho, Prof. Lucia Leitão, Prof. Norma Lacerda, Prof. Vera Milet Pinheiro.

The main objective of the course is to train experts in the management of urban and territorial conservation process with special emphasis on areas of natural, historic, artistic and cultural interest. The programme is designed to encourage the introduction of conservation principles into the urban and territorial planning process and sensitivity to differing cultural, social and economic realities on various parts of the world. Special emphasis is given to Latin America and the Caribbean.

The specific objectives of the training programme are as follows:

- *Values* - definition of the process of assessment and dissemination of cultural values in a context of social, political and cultural diversity, integrated sources of funding and information;
- *Policy* - the development of local conservation policies with critical reference to international and national recommendations and legal frameworks;
- *Planning and management* - guidelines for organisation and management of local conservation policies, programmes, plans and projects;
- *Implementation* - comparative assessment of various implementation strategies and planning tools;
- *Information management* - promoting awareness of conservation principles among professionals, policy makers and the general public.

The course will discuss the meaning and the methodology of conservation in the context of urban and territorial planning with regard to continuity with tradition and control of change in contemporary society. This will involve a balanced assessment of values, establishment of appropriate policies, and development of structures for the planning, implementation and management of projects. The programme is divided in 10 modules, and deals with the following topics:

- clarification of relevant concepts and definitions in urban and territorial conservation with regard to international guidelines and recommendations;
- integration of dynamic conservation principles into the planning process with a view to sustain ability of rehabilitation and development of the existing environment;
- identification of actors and formulation of objectives in the decision making process as a basis for designing appropriate strategies;
- redefinition and use of planning tools as part of a critical process, including mobilization of resources, documentation, databases, norms, standards and legal procedures;
- implementation, control and verification of project management, and promotion of public awareness of sustainable development.

The aim of the course is to establish an international forum for the exchange and critical comparison of the experiences on the basis of case studies, in order to identify the fundamental criteria of the conservation planning process and their application to specific cultural, social and economic realities. Substantial contribution from each participant is an essential prerequisite for the success of the course. The participants will play an active role in the definition of the content, critical evaluation and documentation of the course.

1998 Activities

Course 1998

Conference???

WHERE DO WE GO NOW?

Although historic towns, villages and cultural landscapes are being recognized as an essential part of our heritage, for example, by the Council of Europe, the UNESCO World Heritage Committee and now even by the World Bank, the concepts relevant to conservation and restoration still tend to refer back to artistic and historic monuments or to 'conventional planning processes'. The fundamental difference between planning the conservation of an historic community and restoring an historic building, would seem to be partly in the definition of what is being preserved, and partly in relevant value judgements. The difference is currently being tested in countries that are undergoing rapid changes in their social and economic structures. Although conservationists may well be aware and defend cultural values in this process, they are in minority, and the situation is continuously escaping from their control.

In town planning; the conventional, enforced master plans tend to be too static to meet current challenges in society. While many countries in the world are still trying to enforce their urban master plans, there are others, for example in Northern Europe, where the tendency is to abolish static planning schemes in favour of a more flexible management structure that would allow to meet the changing requirements in terms of development. Such transformation is particularly striking in the former socialist block, where the impact of market economy is currently flooding the society - for good and bad. Historic buildings and sites that used to be protected by the State are being taken over by private proprietors, and the role of State authority is shifting from the exercise of full control towards advocacy and consultancy. Such a change is reflected in attitudes and may be building up a new 'culture', although this will take its time. Similar changes can also be detected in other parts of the world; in south-eastern Asia, conservationists have started working at the community level, in order to promote grass-roots awareness of heritage values. Such developments also coincide with the aim in risk preparedness programmes through the international Blue Shield movement.

A city is a functional entity which has the constant need of satisfying the requirements of its users. A town is conceived as historical if it is associated with relevant concepts and values. Such association is often seen in the elements of a city which have been there for a long time and have contributed to the identity of the place, such as ancient monuments, public squares and other physical features. What is more difficult to define is the continuity of functions. Defining a city as a dynamic process may assist in understanding what changes can be conceived as part of such continuity; this should necessarily be related with the physical fabric of the town, the character and typology of its buildings and spaces. It is the dialectic relationship of physical features and functions that electrifies and creates an appropriate intensity in the use of an urban ensemble; in fact, this should be a creative and stimulating experience for the

inhabitants and users. No wonder that urban centres have always been cultural focal points promoting evolution and development.

The term 'integrated conservation' was coined in the mid-1970s with the purpose to include cultural heritage values into the planning process at an equivalent level with economic and social issues. In the 1980s, this concept was complemented with the issue of 'sustainable development'; this should however be properly qualified. Major emphasis is often given to environmental sustainability, in order to avoid too drastic changes in modern society, and not to destroy the often delicate balance between the built and natural environment. The difference between integrated conservation and environmentally sustainable development would be in their different objectives; while one emphasizes the protection of features that are associated with particular heritage values, the other focuses on the management of resources. Conservation of exceptional features of high cultural value may not always be economically viable, and could therefore risk being rejected by advocates of sustainability. There is certainly also parallelism between the two approaches; therefore, communication would be beneficial to both. In order to establish a common ground, both approaches should be considered in the community planning and negotiation process. It is here that the different values should be critically assessed and compared in view of balanced judgements.

The recent debate on authenticity has risen due to two main reasons; one is related to diversity of values, the other to diversity of heritage. In either case, the issue is about clearly defining the aim of conservation. If conservation is based on the recognition of the historicity of specific artefacts or structures, the answer is in keeping the genuine material; if, instead, the aim is to maintain and continue traditional know-how and a way of life, focus would be on 'non-physical' features and traditions. In an historic town, it would be necessary to consider both aspects, and the question is how to find the right balance. It would be a mistake to define 'urban conservation' only in reference to the management of change, but it would be equally problematic to impose museum functions on living historic ensembles. Furthermore, conservation of historic towns needs to be dealt with in reference to the whole ensemble and its context. This is a matter that can not be solved by an authority alone; there is need for a clear definition of values and an informed negotiation of priorities with the participation of all sectors of society in the decision-making process.

APPENDICES

Neringa Resolution 1997 Baltic Workshop 1997

Because heritage is a unique and a concrete expression of human achievements and is continuously threatened with irreversible destruction;

Because heritage conservation is a means of slowing down and reversing this process of destruction;

Because integrated urban conservation recognises the complexity and interrelatedness of the many material and human elements;

Because human communities living in cities are immediately responsible for their preservation, and the most important planning decisions rest with local authorities;

Therefore, we, conservation specialists from Belarus, Canada, Estonia, Italy, Latvia, Lithuania, The Netherlands, and Scotland, assembled in the unique natural and cultural setting of Neringa, October 27-31, 1997;

Thank the Ministry of Culture of the Republic of Lithuania, the Canadian-Baltic Municipal Co-operation Program, the Canadian Urban Institute (CUI), The International Centre for the Study of the Preservation and Restoration of Cultural Property (ICCROM), and the Edinburgh Old Town Renewal Trust (EOTRT) for organising a Pilot Course on Integrated Urban Conservation with particular focus on the current problems of Eastern Europe;

State that the problems of urban conservation of this region are similar, and that during this course, a mutual understanding developed between specialists of many states and a network of close co-operation was established;

Define the essential problems of urban conservation of this region;

Urge that the following principles and recommendations be adopted by appropriate individuals and agencies:

REGIONAL PROBLEMS

- Wholesale changes in forms of property ownership are taking place affecting the condition of urban heritage;
- There is inadequate knowledge and acceptance of heritage values in state institutions and the community;
- There is inadequate preparation of specialists to work under the new conditions;
- There is unintegrated, often duplicated, activity among various specialists and agencies;
- Social, environmental, and cultural heritage requirements are inadequately integrated;
- The implementation of urban conservation is more fragmentary than integrated;
- Municipalities do not have adequate rights and responsibilities in preserving and managing their heritage.

RECOMMENDATIONS

General Principles

- 1) Conservation of urban heritage is a normal, unending and self-renewing part of living.

2) Conservation of urban heritage should be an integrated and creative process encompassing political, economic, social, cultural, environmental and technological considerations.

Co-operation:

3) In pursuit of urban conservation, it is necessary to have openness and dialogue at all levels of the community:

- a) among specialists;
- b) among disciplines;
- c) between specialists and state agencies;
- d) among various state agencies;
- e) between state agencies and the community;
- f) between specialists and the community;
- g) between regional states having a shared background;
- h) with co-operating state institutions such as the Canadian Urban Institute, the Edinburgh Town Renewal Trust;
- i) with international organisations such as UNESCO, ICCROM, ICOMOS.

4) The relations among participants in urban conservation should be open, transparent, based on the exchange of information, and the activities of heritage specialists should be consistent and predictable.

5) The preparation of laws relating to urban heritage should be open and transparent and include as many agencies and community organisations as possible.

6) It is important to encourage the attitude, that in the process of urban conservation, particularly when reaching decisions, various community groups should participate and their interests should be addressed.

The Planning of Strategy and Financing

7) The democratization and decentralization process should be carried out by giving the municipalities more rights and responsibilities.

8) When solving the problem of urban heritage conservation it is necessary to have a strategy, plans for its realisation, and mechanisms for propagating and controlling the conservation process.

9) In financing heritage conservation, all sources of raising funds must be explored, particularly such progressive western innovations as tax relief. Funds must be used rationally.

10) The solving of urban heritage problems should be grounded in urban research, working in interdisciplinary groups, especially in preparing territorial planning documents.

11) The municipalities and property owners should be responsible for urban heritage research and strategy creation.

12) Funds for urban heritage research should be included in state, municipal and investor budgets.

13) There should be legislation requiring that all documents pertaining to urban heritage research and development, in one copy, be deposited in the state archives where they are available to the community.

Education:

14) To ensure urban heritage conservation and public participation in it, education of the community, its decision-making leaders, owners of heritage objects, and the youth is particularly important. This includes specialists of all kinds as well as craftsmen.

15) The integrated urban conservation course, addressing and solving regional urban heritage problems, should be continued: this process should be established through appropriate international regional initiatives that include ICCROM, (ITUC), ICOMOS, EOTRT CUI, and national ministries of Culture, associations of architects, heritage agencies and municipalities. Such programmes and such courses should attract specialists from all fields, who would search for new solutions and make recommendations to resolve specific problems in regional urban conservation.

First Expert meeting, Rome 1995, List of participants

BONNETTE, Michel	Organization of World Heritage Cities, Québec
BRUNO, Andrea	R. Lemaire Centre for Conservaiton, KU Leuven, Belgium
BURMAN, Peter	Institute of Advanced Architectural Studies, University of York
CESARI, Carlo	University of Ferrara, Italy; ICCARHE, Council of Europe Training Centre, San Servolo, Venice
EL HAJJAMI, Abdelatif	ADER-FES, Fes, Morocco
FEJERDY, Tamas	ICOMOS CIVVIH, Budapest, Hungary
GHOSH, Santosh	Centre for Built Environment, Calcutta, India
JOKILEHTO, Jukka	ICCROM; ICOMOS CIF
LAENEN, Marc	ICCROM; ICOMOS Vernacular Architecture Committee
LARSEN, Knut Einar	The Norwegian Institute of Technology, Trondheim; ICOMOS, Wood Committee
LESAGE, Denis	Institut National du Patrimoine, Tunis
MARASOVIC, Tomislav	Mediterranean Centre of Archit. and Urban Heritage, Split; ICOMOS Croatia
MARSTEIN, Nils	Directorate for Cultural Heritage, Oslo; ICOMOS Norway; ICCROM Council Member
METRO, Alexandre	Centre d'Études Supérieures d'Histoire et de Conservation des Monuments Anciens, Paris
NOGUCHI, Hideo	Cultural Heritage Division, UNESCO
STOVEL, Herb	ICOMOS, Institute for Heritage Education, Montreal
TONELLOTO, Alfeo	UNESCO
VAN NISPEN, Leo	ICOMOS

Observer:

BONDOUX, Thierry Ministère de la Culture, Paris

Other invited persons, who did not attend:

CARBONARA, Giovanni	University of Rome
DAVIES, Richard	UK; ICCROM Council Member
DE SILVA, Nimal	ICOMOS Sri Lanka
DOMICELJ, Serge	Association Internationale d'Urbanisme, AIU
LUXEN, Jean-Louis	ICOMOS
MATTOS-CARDENAS, L.	Peru; ICCROM Council Member
von DROSTE, Bernd	World Heritage Centre, UNESCO
WHALEN, Timothy	Getty Grant Program

The First List of Persons Invited to the ITUC Advisory Committee

Bonnette, Michel, Mr.	Director of Research and Development	Organization of World Heritage Cities	Canada
Bouché, Nancy, Ms.	Consultant	The Council of Europe	France
Bray, Paul, Mr.	Senior Counsel	New York State Legislative Bill Drafting Committee	USA
Bruno, Andrea, Prof.	President	R. Lemaire Centre for Conservation	Belgium
Burman, Peter, Mr.	Director of Studies	I.o.A.A.S., University of York	England
Cesari, Carlo, Mr.	Director	Centro Europeo per i Mestieri, Venezia	Italy
Dalibard, Jacques, Prof.	Professor	University of Montreal	Canada
Davies, Richard, Mr.	Director	COTAC	England
Denhez, Marc, Prof.	Professor, Barrister- Solicitor	University of Montreal	Canada
Domicelj, Joan, Ms.	Conservation Consultant	Private Practice	Australia
Domicelj, Serge, Prof.	President	Association Internationale des Urbanistes	Australia
El-Hajjami, Abdelatif, Mr.	Director General	ADER-FES	Morocco
Fejerdy, Tamas, Mr.	President	ICOMOS CIVVIH	Hungary
Jacobs, Peter, Prof.	Professor	University of Montreal	Canada
Lincourt, Michel, Mr.	Consultant	UNESCO, World Heritage Centre	France
Noguchi, Hideo, Mr.	Programme Officer	UNESCO, Cultural Heritage Division	France
Piccinato, Giorgio, Prof.	Professor	Third University of Rome	Italy
Siravo, Francesco, Mr.	Consultant Planner	Private Practice	Italy
Stovel, Herb, Prof.	Professor	University of Montreal	Canada
Tanghe, Jan, Prof.	Professor	R. Lemaire Centre for Conservation	Belgium
Van Nispen, Leo, Mr.	Director	ICOMOS	France
Zancheti, M., Silvio, Prof.	Professor	Federal University of Pernambuco	Brazil
Metro, Alexandre, Prof.	Acting Director	Centre d'Etudes, Palais de Chaillot	France

List of participants to the ITUC-97 International Workshop at ICCROM

Alaya, Flavia	School of Social Science and Human Services	USA
Assi, Eman	An-Najah National University	West Bank
Attwell, Melanie	City Planner's Department	South Africa
Best Costa, Lorenzo	University of Chile	Chile
Bjonness, Hans	Norwegian University of Science and Technology	Norway
Es Sherif, Amr	Alexandria	Egypt
Inaba, Nobuko	Agency for Cultural Affairs	Japan
Khimshiashvili, Kakha	Ministry of Culture	Georgia
Kienzl, Barbara	Bundesdenkmalamt	Austria
Klosek-Kozłowska, Danuta	Warsaw University of Technology	Poland
Kulatunga, Sarath	Cultural Triangle Project	Sri Lanka
Lee Chibli, José	INAH	Mexico
Milet-Pinheiro, Vera	Federal University of Pernambuco	Brazil
Mwalim, Ali Mwalim	Stone Town Conservation and Dev. Authority	Zanzibar
Perähuhta, Minna	Tampere University of Technology	Finland
Rojas-Avalos, Angela	Faculty of Architecture, Havana	Cuba
Sangachhe, Surya	Ministry of Culture	Nepal
Sharif, Walid	Ministry of Culture	West Bank
Staniuniene, Irena	Institute of Monument Restoration	Lithuania

ITUC-97, Questionnaire (Competence diagnostic)

KNOWLEDGE	<ol style="list-style-type: none"> 1. Knowledge of the basic conservation principles expressed in international conventions, recommendations and charters; 2. <u>Knowledge of the principles and criteria of integrated urban conservation planning in a sustainable development framework;</u> 3. Knowledge of the main political, legal and institutional environment where urban planning process takes place; 4. <u>knowledge of significant cases of urban conservation master plans, programmes and projects;</u>
SKILLS	<ol style="list-style-type: none"> 5. <u>ability to identify and interpret values and their relation with the physical and functional structure of a city;</u> 6. <u>ability to investigate the historic development process of a city, the main constrains, political and economic forces and actors that have driven the process in the recent past (50 years!);</u> 7. ability to make surveys and records, and to prepare reports on historic structures; 8. <u>ability to read and interpret the main data for the social and economic characterization of a city:</u> <ul style="list-style-type: none"> ▪ the physical structure of a city and its historical stratification; ▪ the main cultural systems in a city and forms of relationships; ▪ <u>a prospective view of the development and future of a city;</u> 9. ability to understand and evaluate master plans and projects formulated for the city in the past; 10. <u>ability to develop planning methods and tools for the preparation of general master plans and detailed projects in the conservation and development of a city;</u> 11. ability to organize and co-ordinate multi-disciplinary planning teams;
ATTITUDES	<ol style="list-style-type: none"> 12. <u>ability to establish contacts and involve different actors in the process of urban conservation and development;</u> 13. <u>ability to deal with different interpreters and actors in the conservation and development process;</u> 14. ability to recognize when advice must be sought in areas of specialization; 15. <u>ability to lead and motivate team work in the conservation planning process;</u> 16. <u>ability to manage situations with scarce resources in terms of information, data and institutional structures.</u>

LIST OF REFERENCES

ARC-94. 'Group Exercise Reports, Monitoring Seminar, Matera, 14-17 February 1994.' Seminar leaders: Jukka Jokilehto, Derek Linstrum, Herb Stovel, Pietro Laureano, and Matera Authorities. ICCROM.

ARC-98. 'State of Conservation of the World Heritage Site, Sassi di Matera.' Report submitted for the International Course on the Conservation of Architectural Heritage and Historic Structures. Report authors: ARC 98 course participants; Report co-ordinator, principal consultant: A. Urland. May-June 1998. ICCROM.

Brock, Ingrid, Paolo Giuliani and Christian Moisescu (1972). *Il Centro Antico di Capua, Metodi di analisi per la pianificazione architettonica-urbanistica*, ICCROM, Marsilio Editore, Padova.

CECI, *Conservação Integrada Urbana e Territorial, Programa Brasil, ITUC/BR*. Relatório Final de Avaliação, 1o Curso de Especialização, 15 de agosto - 15 de dezembro, 1997.

ITUC-97. Analysis of the Competency Diagnostic Questionnaire, JK (N.D.)

ITUC-97. Breakdown of applicants and participants. Jk.

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ITUC-97. Detailed Daily Programme, 27 February to 25 April 1997. ICCROM 1997.

ITUC-97. Draft Activities Plan. ACTIVIT1.doc, jk, jj, gd, 17 Jan., 99.

ITUC-97. Draft, Competencies for a specialist in integrated territorial and urban conservation, JK, 19 Dec. 96

ITUC-97. FINOBJ5.doc, by jj, jk, gd, 18 Dec. 96.

ITUC-97. 'ICCROM's Programme on Integrated Urban and Territorial Conservation, ITUC, Some reflections on present challenges and programme potential.' By J. Jokilehto in consultation with S. Zancheti (Brazil), K. Lisitzin (Sweden), and C. Cesari (Italy) (19 September 1996).

ITUC-97. List of names of persons invited to be on the Advisory Committee for ITUC. ACNAMES.doc, jk, 20 February 1997.

ITUC-97. Percorso di analisi e progettazione formativa, Competency Diagnostic, Indagine e promozione. G. Diviso, July 1996.

ITUC-97. Report on the ITUC Advisory Committee Meeting, 14-16 April 1997, ICCROM, Rome.

ITUC-97. Summary of First impression of results from the Competence Diagnostic, by J. King, 15 October 1996.

ITUC-97, Summary of the ITUC-97 Competence Diagnostic Questionnaire, by J. King (N.D.)

Zancheti, S. and J. Jokilehto (1997). 'Values and Urban Conservation Planning: Some Reflections on Principles and Definitions', *Journal of Architectural Conservation*, Nr. 1, Vol. 3, March 1997, pp. 37-51.

Zancheti, S., G. Marinho and V. Milet (eds.) (1995). *Estratégias de Intervenção em Áreas Históricas, Revalorização de Áreas Urbanas Centrais*. Mestrado em Desenvolvimento Urbano UFPE, Projeto PNUD-SEPURB BRA 93/013. Recife.

¹ **Deadlines and tasks:** Preparation of a synthesis of the development of ITUC programme from 1994 to date. The first draft should be submitted by 31 January 1999. Formal printing and presentation during the Nara meeting on Asian Historic Cities in early March 1999. The report should include: Inception of the programme (UCI in 1994) linked to the history of ICCROM's involvement with urban conservation; Evolution of thinking within the programme: key ideas coming from the international meetings; Key outcomes of regional activities in NE Europe and in Brazil (input to be provided by Herb Stovel and Silvio Zancheti); Conclusions re operational necessities, pragmatic orientations, incremental development, linking regional to international and the guiding philosophy of ITUC (integrated, sustainable, treatment of universal versus the particular, etc.: what does ITUC stand for?)

² The survey was later published by: Ingrid Brock, Paolo Giuliani and Christian Moisesescu (1972). *Il Centro Antico di Capua, Metodi di analisi per la pianificazione architettonica-urbanistica*, ICCROM, Marsilio Editore, Padova.

³ An ICCROM team, led by J. Jokilehto, prepared the World Heritage evaluation report. Subsequently, the course participants worked in Matera preparing a series of reports on the area of the Sassi. These reports have been collected and edited under the co-ordination of Dr. Andrea Urland.

⁴ As a contribution to the debate on values, Silvio Zancheti and Jukka Jokilehto had prepared a paper on this issue, 'Values and Urban Conservation Planning: Some Reflections on Principles and Definitions', later published in *Journal of Architectural Conservation* (See: Zancheti and Jokilehto, 1997).

⁵ The report concerning the ITUC-97 international workshop has been based on documents prepared by J. Jokilehto, J. King, and G. Diviso.